

Product Release Notes for Rosterfy 2.0 – 22nd June 2021

Functional Updates	2
General	2
Photo popup edit improvements	2
Additional Terms included as translatable, under Events	3
Candidate Portal timeout warning update	3
Changes to data can be tracked in new 'history' option across platform	4
All locales/languages are available to be updated in a draft state	5
Communications	6
Additional SMS provider available: Ooderoo	6
Automations	8
Additional Automation guidance added	8
New Automation Action - emails can be sent to email attributes	8
Reporting	10
Report extract optimisation	10
Cancel report button added	10
Headcount	11
New role offer status: Waitlist	11
Settings & Permissions	13
Attribute restrictions available in permission roles	13
Technical Updates	14
General	14
Value added in the county list	14
Role offer status, within filters, for reports were not a dropdown	14
Cannot create Group without rules	14
Microsoft Teams integration not pulling meeting URL through	14
'Date/Time Added' for User Listings was not correctly showing in local timezone	14
Submit button covered when hit once	15

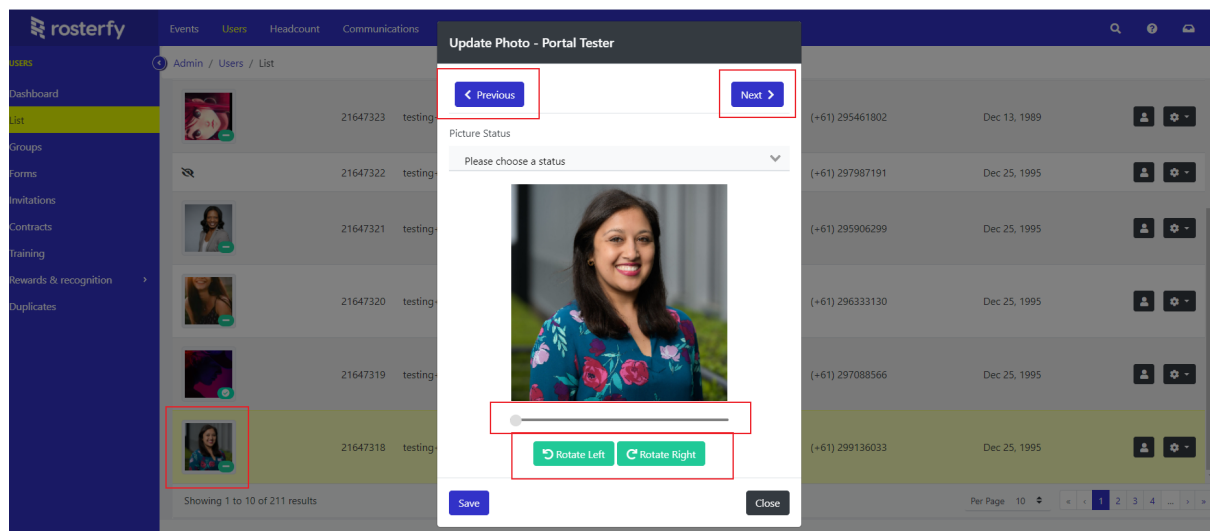
Functional Updates

General

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

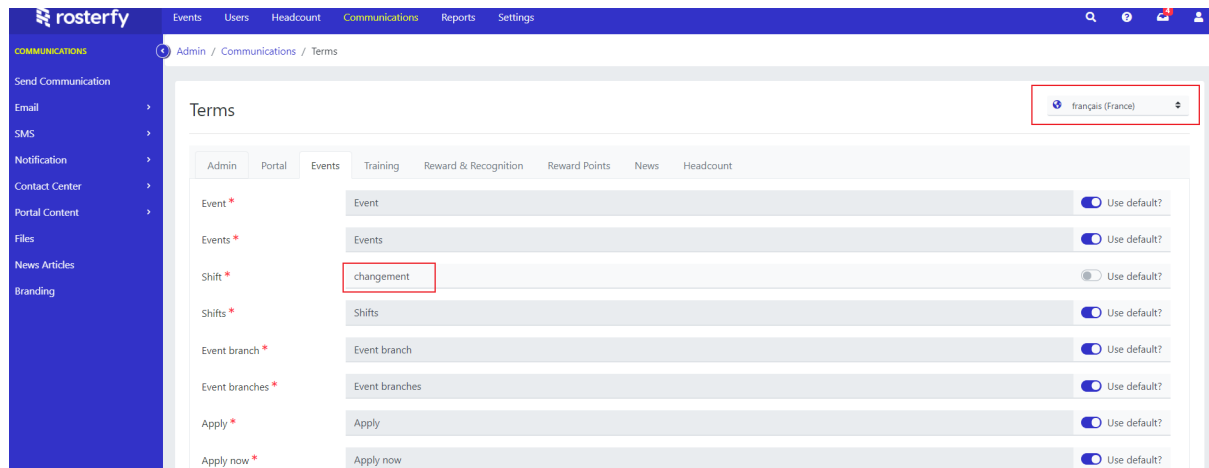
Photo popup edit improvements

Under the User List, Admins will now be able to see an improved popup view, where User photos can be more easily edited, approved (updating the status), and cycled between (previous and next).



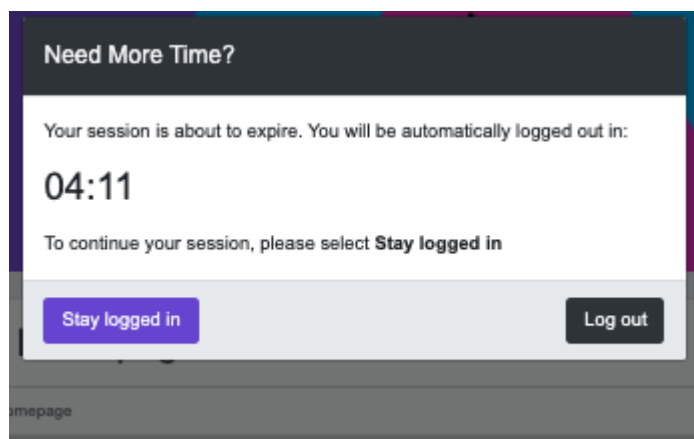
Additional Terms included as translatable, under Events

A number of additional terms are now available to be translated into different languages as necessary, within Events. This is still done in the same way, as per screenshot below. Note - 'Shift' is not new but only used as an example.



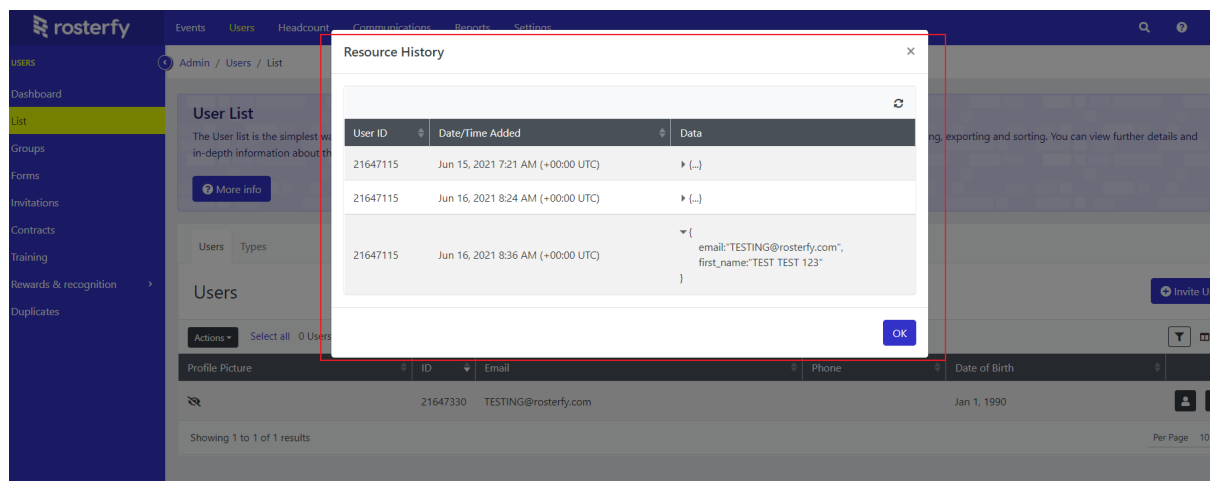
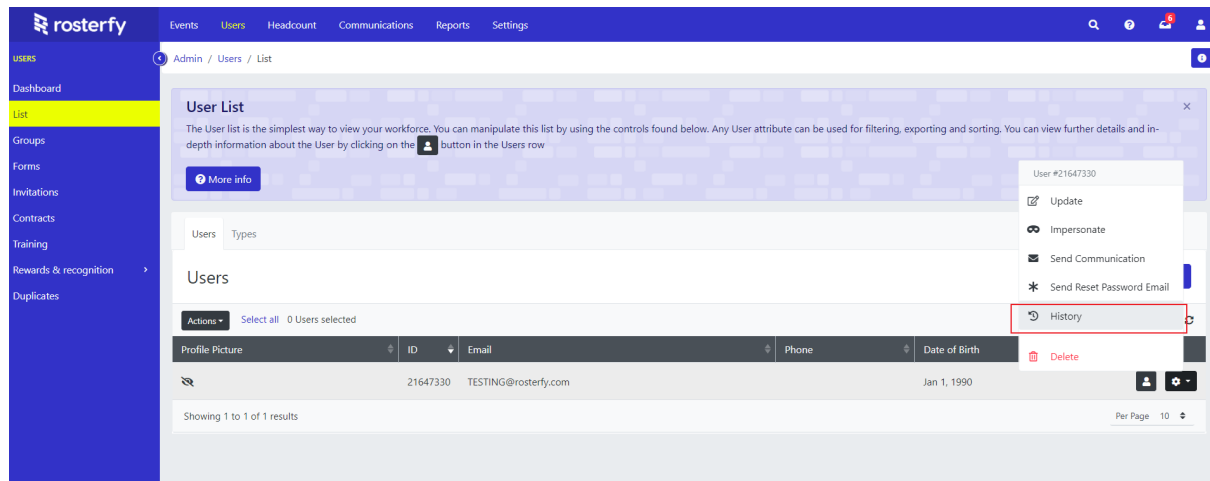
Candidate Portal timeout warning update

For Candidates, we have added the session expiry timeout warning, to mirror the same that exists within the Admin site. An example is shown below.



Changes to data can be tracked in new 'history' option across platform

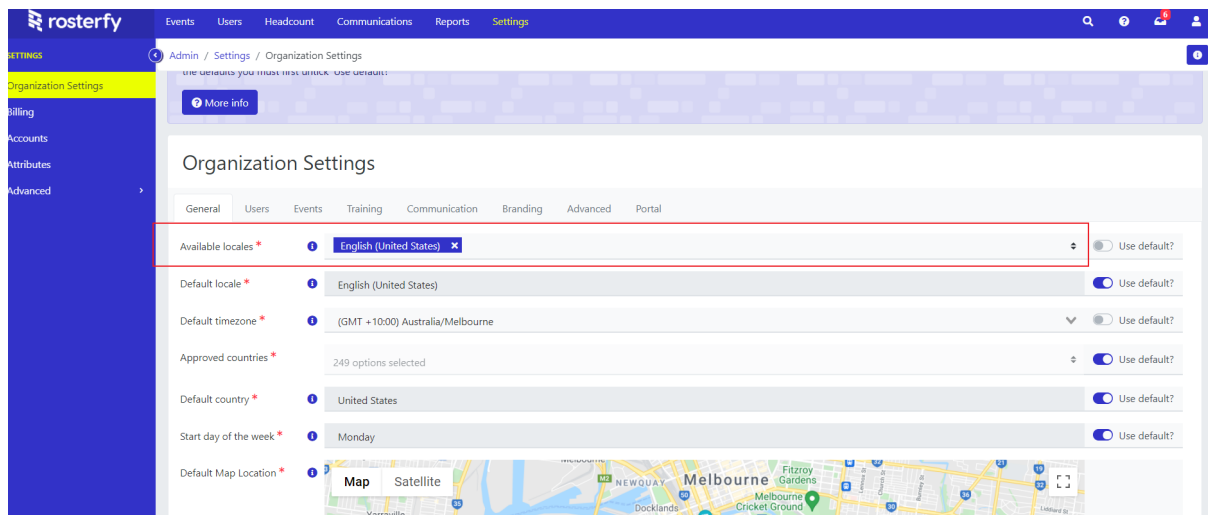
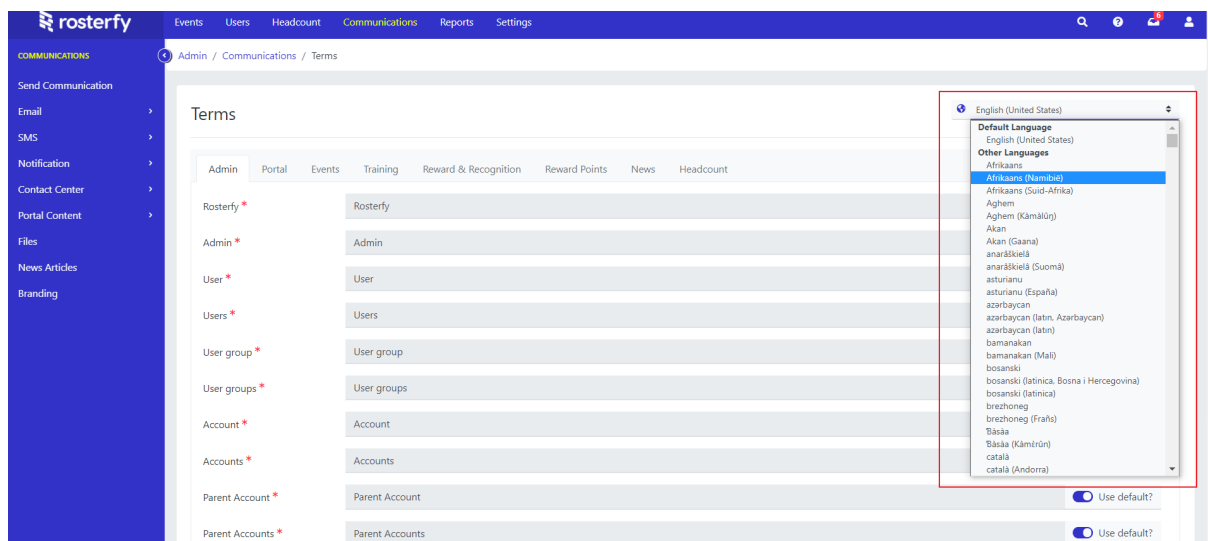
Admins are now able to track the history by clicking on the circular options icon across many dashboards across the platform. This will bring up a popup that will list out updates to this particular entity, as well as which attributes were updated, and at what time it was updated.



All locales/languages are available to be updated in a draft state

All locales/languages can now be prepared in a draft state by admins. This, for example below, can be seen by the dropdown available wherever languages can be selected (e.g. portal terms).

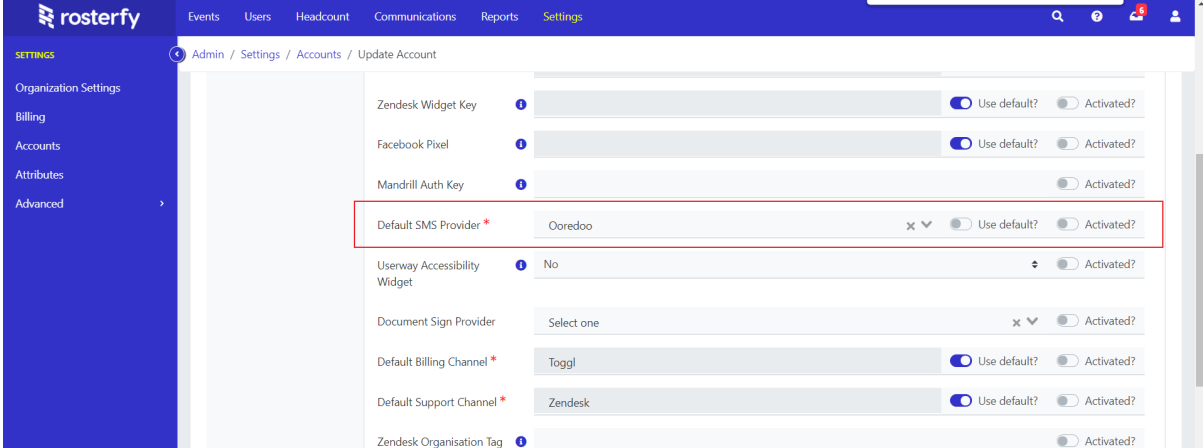
This means admins will be able to prepare their site for translations before it is available in full to candidates. Candidates will be able to see only languages relevant to their locales as per the existing settings (see second screenshot below).



Communications

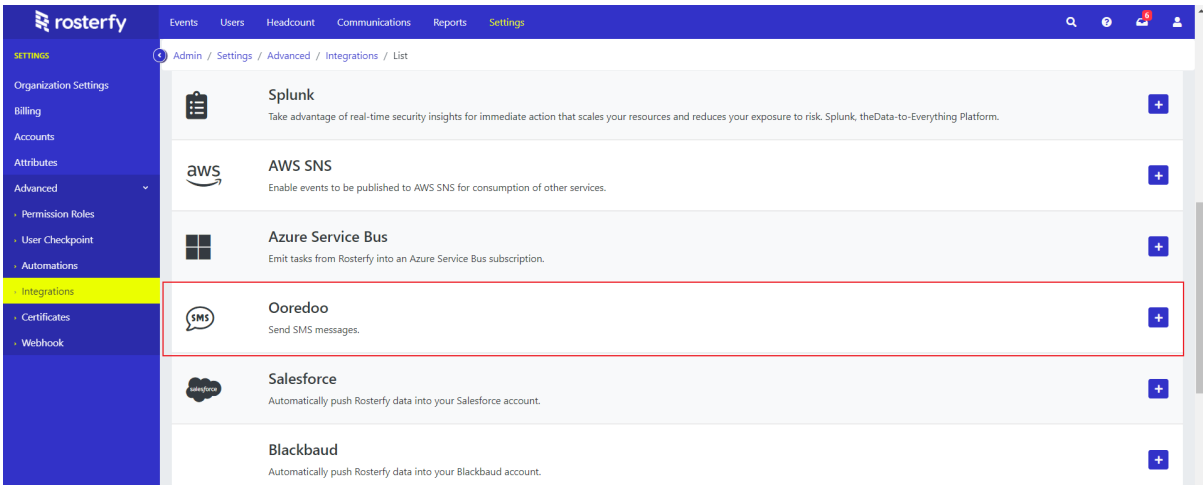
Additional SMS provider available: Ooderoo

An additional SMS provider is now available, Ooderoo. This will need to be selected in account settings on the parent account for sub-accounts, under settings > advanced. Admins will then be able to add against this SMS provider by adding in relevant details.



The screenshot shows the 'Update Account' settings page in Rosterfy. The left sidebar contains a 'SETTINGS' menu with options: Organization Settings, Billing, Accounts, Attributes, and Advanced. The main content area is titled 'Admin / Settings / Accounts / Update Account'. It lists various integrations and their status:

Integration	Value	Use default?	Activated?
Zendesk Widget Key	[Input field]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Facebook Pixel	[Input field]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mandrill Auth Key	[Input field]	<input type="checkbox"/>	<input type="checkbox"/>
Default SMS Provider *	Ooderoo	<input type="checkbox"/>	<input type="checkbox"/>
Userway Accessibility Widget	No	<input type="checkbox"/>	<input type="checkbox"/>
Document Sign Provider	Select one	<input type="checkbox"/>	<input type="checkbox"/>
Default Billing Channel *	Toggl	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Default Support Channel *	Zendesk	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Zendesk Organisation Tag	[Input field]	<input type="checkbox"/>	<input type="checkbox"/>



The screenshot shows the 'Integrations' page in Rosterfy. The left sidebar contains a 'SETTINGS' menu with options: Organization Settings, Billing, Accounts, Attributes, Advanced, Permission Roles, User Checkpoint, Automations, Integrations (highlighted), Certificates, and Webhook. The main content area is titled 'Admin / Settings / Advanced / Integrations / List'. It lists various integrations and their status:

Integration	Description	Activated?
Splunk	Take advantage of real-time security insights for immediate action that scales your resources and reduces your exposure to risk. Splunk, theData-to-Everything Platform.	<input type="checkbox"/>
AWS SNS	Enable events to be published to AWS SNS for consumption of other services.	<input type="checkbox"/>
Azure Service Bus	Emit tasks from Rosterfy into an Azure Service Bus subscription.	<input type="checkbox"/>
Ooderoo	Send SMS messages.	<input type="checkbox"/>
Salesforce	Automatically push Rosterfy data into your Salesforce account.	<input type="checkbox"/>
Blackbaud	Automatically push Rosterfy data into your Blackbaud account.	<input type="checkbox"/>

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EventsUsersHeadcountCommunicationsReportsSettings

Admin / Settings / Advanced / Integrations / Update Integration

SETTINGS

Organization Settings

Billing

Accounts

Attributes

Advanced

Permission Roles

User Checkpoint

Automations

Integrations

Certificates

Webhook

Update Integration

Ooredoo

General

Originator *

Customer ID *

Username *

Password *

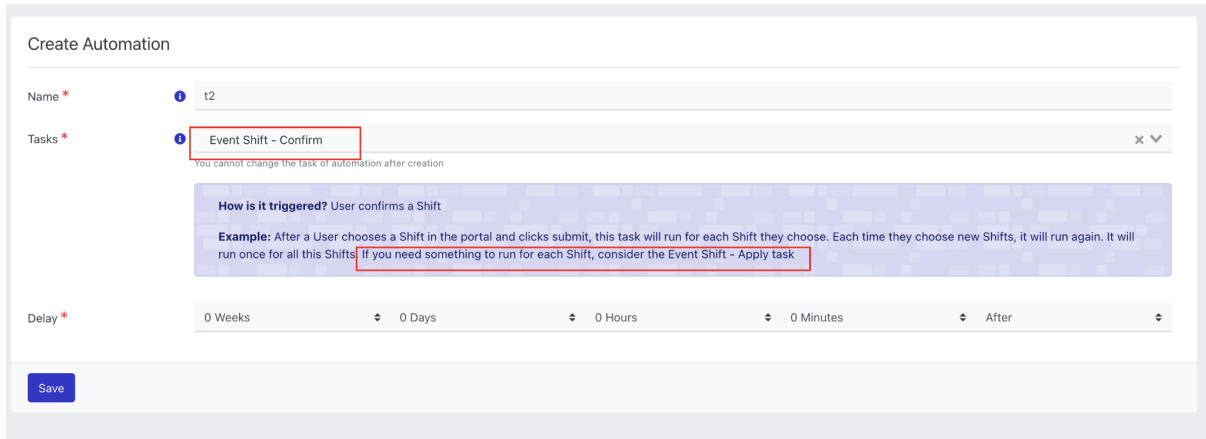
Enable

sms:ooredoo

Automations

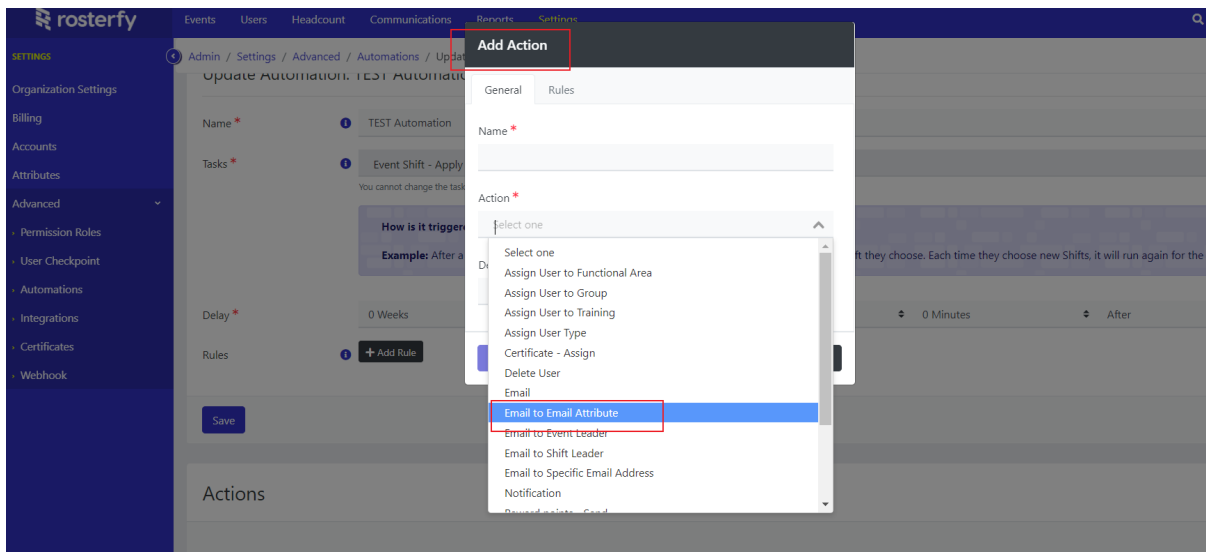
Additional Automation guidance added

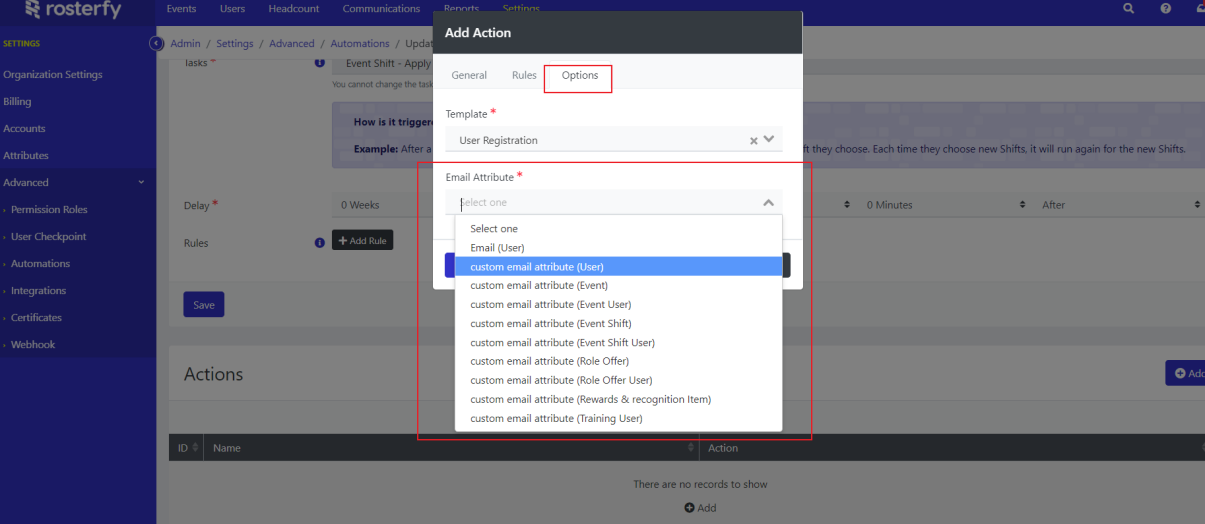
Following customer feedback, we have added additional guidance language on the 'Create Automation' screen for each task and how the trigger works.



New Automation Action - emails can be sent to email attributes

A new Automation Action has been added - Admins can now create an action to 'email to email attribute'. This will pull a list of potential custom attribute values that have been set up as emails. This will add greater flexibility and functionality for Automations that require emails to go out to additional email addresses.





The screenshot shows the Rosterfy interface with the 'Add Action' dialog box open. The 'Options' tab is selected, and the 'Email Attribute' dropdown is open, showing a list of email attributes. The 'custom email attribute (User)' option is highlighted.

Add Action

General Rules **Options**

Template *
User Registration

How is it triggered
Example: After a

Delay *
0 Weeks

Rules
+ Add Rule

Save

Actions

Email Attribute *

- Select one
- Email (User)
- custom email attribute (User)**
- custom email attribute (Event)
- custom email attribute (Event User)
- custom email attribute (Event Shift)
- custom email attribute (Event Shift User)
- custom email attribute (Role Offer)
- custom email attribute (Role Offer User)
- custom email attribute (Rewards & recognition Item)
- custom email attribute (Training User)

ID Name Action

There are no records to show

+ Add

Reporting

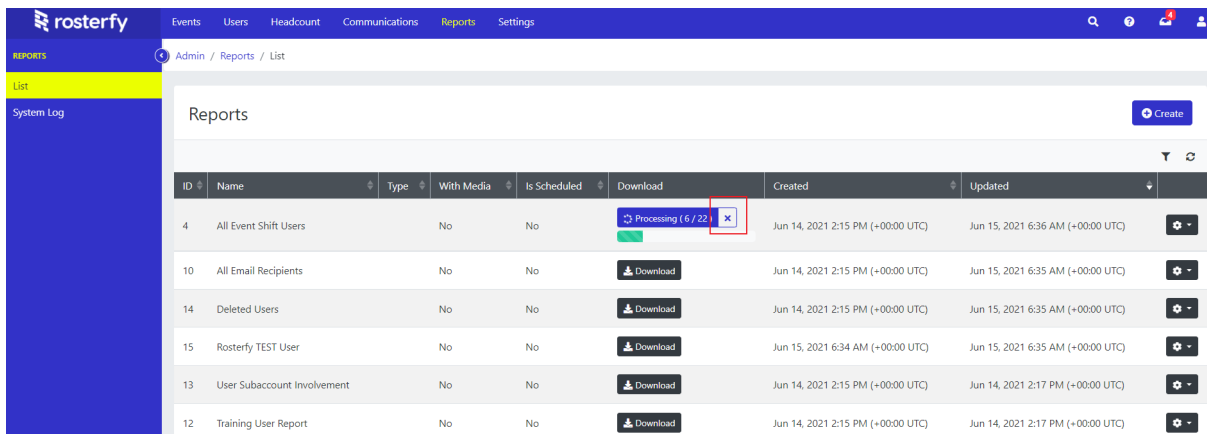
Report extract optimisation

Significant work has been done in core of the Rosterfy platform, so that reports will extract and run faster for Admins. Multiple reports will now also run concurrently, rather than reports running sequentially (waiting for the first to finish before the next starts).

Cancel report button added

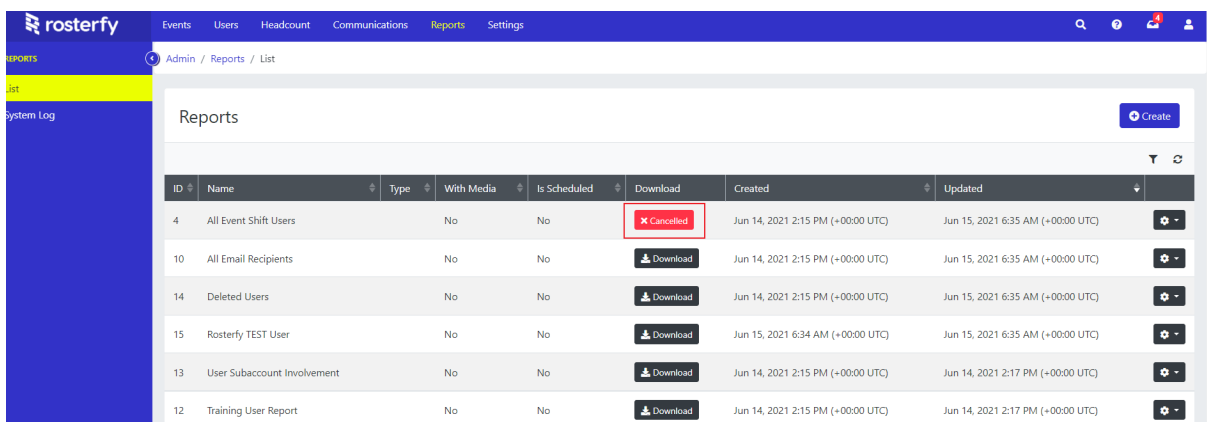
A cancel button has been added to the Reports module, where the 'x' button will allow admins to cancel reports, in the event that they are stuck (which typically would only potentially happen if the reports are extremely large). Rosterfy would advise re-running the report with less fields in this event.

Note - this cancel button does not exist for queued reports.



The screenshot shows the Rosterfy Reports module interface. The left sidebar contains 'REPORTS', 'List', and 'System Log'. The main area is titled 'Reports' and includes a 'Create' button. A table lists reports with columns: ID, Name, Type, With Media, Is Scheduled, Download, Created, and Updated. The first report, 'All Event Shift Users' (ID 4), is in a 'Processing (6 / 22)' state, indicated by a green progress bar and a red box around the 'Download' button which contains a cancel icon (an 'x' in a square).

ID	Name	Type	With Media	Is Scheduled	Download	Created	Updated
4	All Event Shift Users		No	No	Processing (6 / 22) [Cancel]	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 15, 2021 6:36 AM (+00:00 UTC)
10	All Email Recipients		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
14	Deleted Users		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
15	Rosterfy TEST User		No	No	Download	Jun 15, 2021 6:34 AM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
13	User Subaccount Involvement		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 14, 2021 2:17 PM (+00:00 UTC)
12	Training User Report		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 14, 2021 2:17 PM (+00:00 UTC)



The screenshot shows the Rosterfy Reports module interface after the report has been cancelled. The 'All Event Shift Users' report (ID 4) now shows a red 'X Cancelled' status in the 'Download' column, highlighted by a red box. The 'Created' and 'Updated' timestamps are now identical.

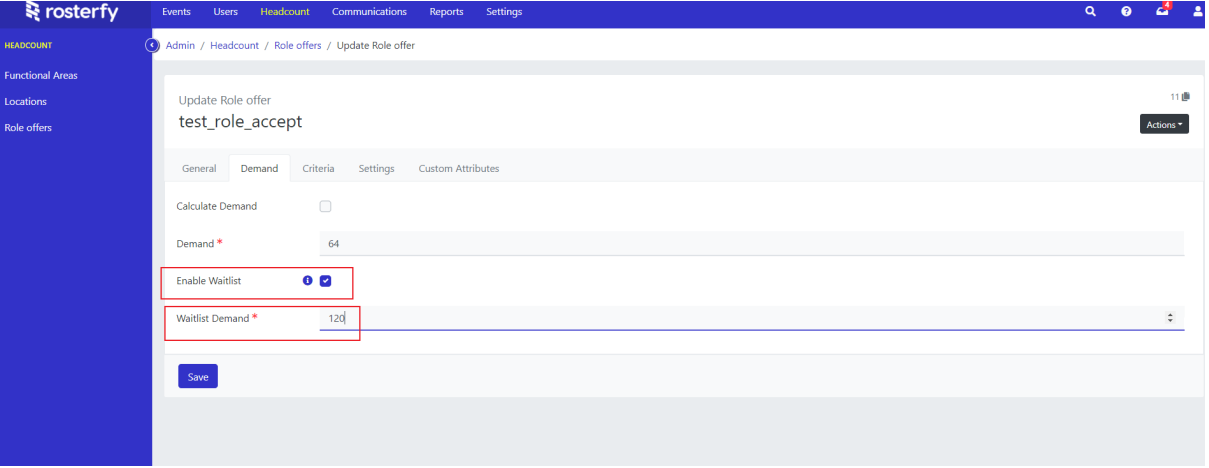
ID	Name	Type	With Media	Is Scheduled	Download	Created	Updated
4	All Event Shift Users		No	No	X Cancelled	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
10	All Email Recipients		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
14	Deleted Users		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
15	Rosterfy TEST User		No	No	Download	Jun 15, 2021 6:34 AM (+00:00 UTC)	Jun 15, 2021 6:35 AM (+00:00 UTC)
13	User Subaccount Involvement		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 14, 2021 2:17 PM (+00:00 UTC)
12	Training User Report		No	No	Download	Jun 14, 2021 2:15 PM (+00:00 UTC)	Jun 14, 2021 2:17 PM (+00:00 UTC)

Headcount

New role offer status: Waitlist

A new role offer status in our Headcount module can be turned on, named 'Waitlist'. Admins can activate this from the 'Demand' tab whenever they are creating or updating a Role Offer - via the enable tick box (see screenshot below) - and also Waitlist Demand can be set.

Once enabled, Waitlist will be able to be tracked separately to demand. This will allow Admins to track a separate Waitlist status for role offers where needed. This has been requested by some of our larger customers, where a Waitlist is needed as part of staffing Volunteers for events.



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Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / Update Role offer

Update Role offer

test_role_accept

General Demand Criteria Settings Custom Attributes

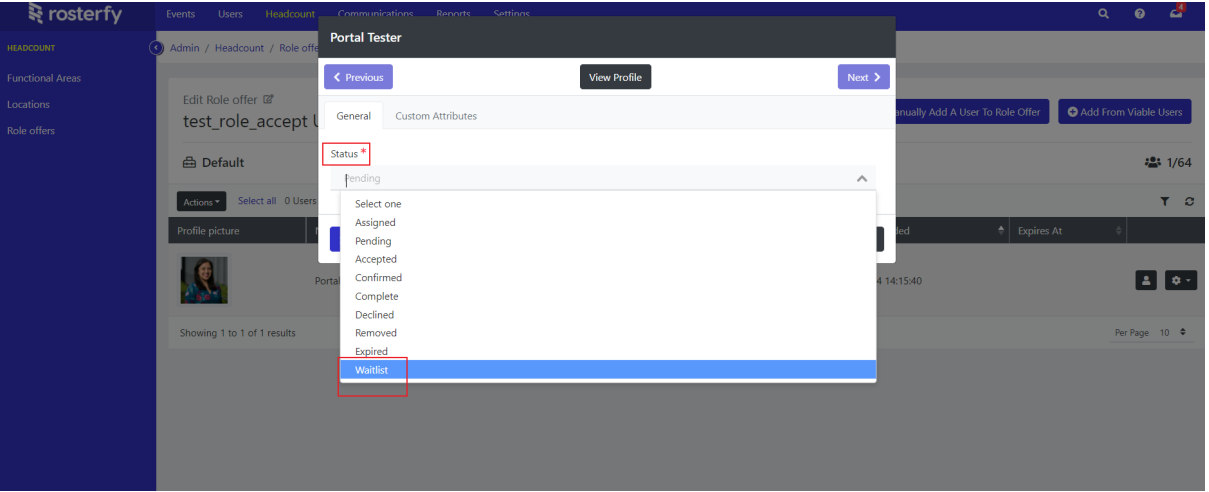
Calculate Demand ☐

Demand * 64

Enable Waitlist ☒

Waitlist Demand * 120

Save



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Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / Update Role offer

Portal Tester

Previous View Profile Next

General Custom Attributes

Status *

Select one

Assigned

Pending

Accepted

Confirmed

Complete

Declined

Removed

Expired

Waitlist

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Events Users **Headcount** Communications Reports Settings


Admin / Headcount / Role offers / Role offer Users

HEADCOUNT

Functional Areas

Locations

Role offers







Edit Role offer 

test_role_accept Users

Manually Add A User To Role Offer Add From Viable Users

Default Default Default 0/64

Actions Select all 0 Users selected

Profile picture	Name	Email	Status	Date/Time Added	Expires At	
	Portal Tester	testing+portal20101@rosterfy.com	Waitlist	2021-06-14 14:15:40		 
	Rosterfy Testing	testing+admin@rosterfy.com	Waitlist	2021-06-15 07:05:15		 

Showing 1 to 2 of 2 results

Per Page 10

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Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / List

HEADCOUNT

Functional Areas











Locations

Role offers

Role offers

Create

Actions Select all 0 Role offers selected

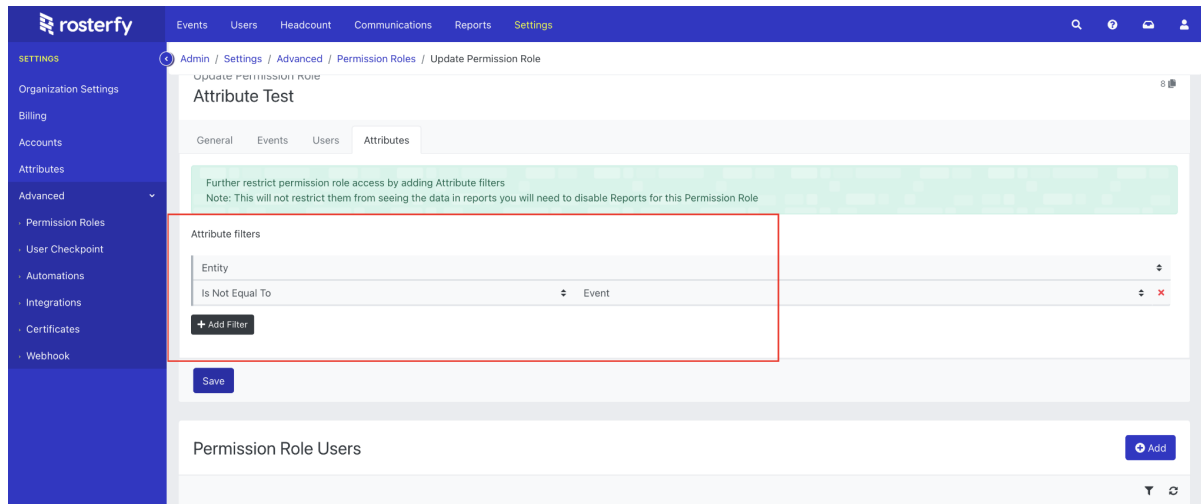
ID	Functional Area	Job Title	Location	Venue	Publish	Demand	Waitlist	Overview	
11	Default	test_role_accept	Default	Default	Yes	64	2		 
12	Default	test_role_reject	Default	Default	Yes	46			 
2	Default	Fence Erector	Default	Default	Yes	30			 
3	Default	Organizational Development Manager	Default	Default	Yes	68			 
4	Default	Sailor	Default	Default	Yes	77			 

Settings & Permissions

Attribute restrictions available in permission roles

Admins are now able to configure specific custom attributes to be hidden from selected permission roles. This is done via a new tab in Settings > Advanced > Permission Roles > Update Permission Role, as per screenshot below. You will now be able to set up an 'attribute filter' here to restrict certain users seeing sensitive data, in the system as well as within reports.

Note - this will apply to custom (newly created) attributes only, not system-attributes (i.e. first name, last name, etc.).



Technical Updates

General

Value added in the county list

A minor update, 'Dorset' was missing as an available county in the UK on Rosterfy - this update has been made

Role offer status, within filters, for reports were not a dropdown

Role offer filters in reporting should have been a dropdown value of role offer status values - rather than a free text field. This has been updated.

Cannot create Group without rules

When an admin user was creating a Group without a rule the page freezes. We have fixed this by adding a validation, where Admin users must add a rule, when the 'auto update' feature is used (i.e. an auto update option is selected).

Microsoft Teams integration not pulling meeting URL through

The Rosterfy-Microsoft-Teams integration had an issue where the URL for the Teams meeting was not pulling through - this has been updated.

'Date/Time Added' for User Listings was not correctly showing in local timezone

The column 'Date/Time Added' for User Listings within the User module was incorrectly showing the UTC time, not the correct local timezone for the account - this has been updated.

Submit button covered when hit once

(#2616)

A small UI update, the Submit Button will now be covered on the Admin site whenever it has been clicked once, and the spinning wheel of 'action processing' appears. This will avoid situations where the Submit button is accidentally hit multiple times.