24 August 2021

R rosterfy

Product Release Notes for Rosterfy 2.0

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

Automations

Any Checkpoint Can Do Deactivation Tasks

For Admins, any Checkpoint now has a new tab, 'Actions', where the 3 Deactivation Tasks can now be actioned by any Checkpoint. As per the screenshot below, 'Remove From Groups', 'Remove From Role Offers' and 'Remove From Future Shifts' can be used in any combination. You can reach this by Update or Creating a Checkpoint.

🗟 rosterfy	Events Users Headcount Communications Reports Settings	Q 0	2 -
SETTINGS	Admin / Settings / Advanced / Checkpoint / Update Checkpoint		0
Organization Settings Billing Accounts Attributes	Update A Checkpoint You can set the permissions on a checkpoint to change the functionality that all the Users with this checkpoint will have in the portal. You also can change the title of the checkpoint which w admin console screens, filters and reports. You can specify which Event types the Users can access in the portal, and whether they can apply for Shifts or just view the Event details.	vill update how it appears in a	×
Advanced × Permission Roles User Checkpoint	Update Checkpoint Default	• English (United States)	3 🏚
Automations Integrations Certificates	General Permissions Actions		
Webhook	Actions are applied when a User goes into a checkpoint. This can be helpful to automate your User journeys		
	Remove from groups 2 Remove from Role offers 2 Remove from future Shifts 2		
	Save		

Events and Shifts

Automatic Rostering Prioritisation

When Admins are using the Automatic Rostering function, we have introduced the option for skipping Users who are already rostered onto Shifts within this Event.

😫 rosterfy									
VENTS	Admin / Events / Shifts / List	Automatic Rostering							
Dashboard List Shift User Status Shift List	Shift List The Shift list is where you can manage a single eve - Changing the statistics and other attributes - inport Shifts into the Event with the "import - Change the list results by filtering the list with	From * User Group User Group *	× ¥						×
Shift Patterns	Perform mass actions like updating Shift det More info	Status *							
Payroll >		Confirmed	× ¥						
	Shifts Types Auto Roster from group @ Shifts	Skip Users already rostered *	0					0	Create
	Actions T III List III Schedule Select none 1S	Selected Shifts	× ¥					Q T	
	ID ∲ Name ∲ Date/Time From 76 Shift 1 Aug 17, 2021 12:00 AM (+00:00 J	Import Updating 1 Shifts	Cancel	leader Pending	Confirmed	Rejected	Overview	Leader Overvi	ew 🗠
	-	JTC) Aug 24, 2021 12:00 AM (+00:00 UTC)	5 6	0 0	0	0			
	Showing 1 to 2 of 2 results							Per Page	10 0
			k						

Email Self-Check-In, Confirm and Reject

We have added a number of options for new mail merge tags, that include a Shift Confirmation, Shift Reject and Shift Check-In link.

This means that these options will be available to be set up with Candidates via email, meaning that Candidates will be able to Confirm, Reject or Check-Into a shift via their email only (not needing to login to their Rosterfy account).

			Start Date/ Time Time	
rosterfy	Events Users Headcount		Start Date/Time Offset	
	Admin / Communications / Se		Timezone	
Communication			custom_shift_eav_select	
	Template		custom_shift_eav_text	
	>		Address	
	Type G	Event Shift User	Custom	ending
	Branding	Check-Out Date/Time	Event Shifts Information	
	> Didnoing	Check-Out Date/Time Date	Event Shift Info	
	Subject *	Check-Out Date/Time Time		
	Content *	Check-Out Date/Time Offset		- :
		Event Shift Status		
		Check-In Date/Time		
		Check-In Date/Time Date		
		Check-In Date/Time Time		
	_	Check-In Date/Time Offset		
		Shift Confirmation Link		
		Shift Reject Link		
		Shift Check-in Link		
			Cancel	
	h a a la im			
	heck in			

Event: Auto Roster from group Shift: shift 3 Shift start date/time: Aug 17, 2021 11:00 AM Shift end date/time: Aug 17, 2021 8:00 PM

Are you sure?

Submit Cancel

Download Shift to calendar from portal

In the portal it is now possible to add a shift to your own calendar. Under any shift info in the portal, you will now see a 'add to calendar' button. Google, outlook and apple calendar are all supported.

A user can also download their shifts to a calendar from the shift confirm landing page (from a confirm link in an email), or from an event confirm landing page as well, which will download all their confirmed shifts on an event at once

ut	shift 3	
rent	S Wed, Sep 1, 2021 12:00 AM (+00:00 UTC) - Fri, Sep 3, 2021 12:00 AM (+00:00 UTC)	
eta	shift description	
lug	custom_shift_eav_select: Preschool Education Administrators	
	custom text attribute: text area	
um	Add To Calendar 🗙 Withdraw	
ts	Close	

	Add To Calendar			
2021	G Google Calendar	é Apple Calendar	Outlook Calendar	
			Close	
eav_s	elect: Preschool Educatio	n Administrators		

Headcount

Bulk Update Status of Functional Area Users

The option has been introduced for Admins to bulk update the Status of Functional Area Users. This will significantly improve the speed of updating in bulk. This can be found in the Functional Area Users list within the Headcount module.

R rosterfy	Events Users	Headcount Communications Reports	Settings						ଦ ଡ	2
COUNT tional Areas tions	3 Admin / Headcount Denaurt ™ Users	/ Functional Areas / Functional Area Users						Manually Add A	User To Functi	onal Area
offers	🛓 Default									
	Actions - Selec	t all 0 Users selected						Search	Q, Y	T
	🗷 Bulk Update	Status	⇔ Status ⇔	Source 4	Profile Picture	\$ ID \$	Phone	♦ Date of Birth ♦		
	auto check	success+268@simulator.amazonses.com	Pending	Automation	Ø	268		Jun 22, 1992	✓ × ±	•
	Dave Wunsch	success+30066@simulator.amazonses.com	Accepted	Automation	ø	30066	(+61) 295078635	Aug 12, 1968	±	\$
	Dawn Davis	success+30067@simulator.amazonses.com	Rejected	Automation	8	30067	(+61) 298283957	Sep 19, 2001	1	٠
	Brooklyn Fritsch	success+30068@simulator.amazonses.com	Rejected	Automation	8	30068	(+61) 295023796	Feb 22, 1947	1	٥
	Dovie Kirlin	success+30069@simulator.amazonses.com	Rejected	Automation	8	30069	(+61) 297808178	Jul 25, 1990	1	۰
	Niko Jenkins	success+30070@simulator.amazonses.com	Rejected	Automation	a	30070	(+61) 296041004	Nov 3, 1988	-	٥
	Zola Luettgen	success+30071@simulator.amazonses.com	Rejected	Automation	a	30071	(+61) 296666091	Apr 21, 1963		٥
	Evert Kohler	success+30072@simulator.amazonses.com	Rejected	Automation	æ	30072	(+61) 295193487	Jun 22, 1998	-	٠
	Mallory Murazik	success+30073@simulator.amazonses.com	Rejected	Automation	æ	30073	(+61) 295001925	May 5, 1988		٥
	Terrell Quitzon	success+30074@simulator.amazonses.com	Rejected	Automation	æ	30074	(+61) 297292868	Sep 7, 1957	1	۰
	Showing 1 to 10 of	11 results						Per Page 10	• « «	1 2 >

🗟 rosterfy	Events Users He	eadcour)	Communications Reports Satti	nas						ଦ୍ 😡	- ²⁹ - ±
HEADCOUNT	Admin / Headcount /	Functio	Bulk Update Status								
Functional Areas	Users		Status *						O Manually Add A Us	er To Functior	al Area
Locations	Lefault		Accepted					× ¥			
Role offers	_		Apply To *	h.							
	Actions • Select al	I O Use						~	Search	<u> </u>	
	Full Name 🔶	Email									
	auto check	succes	Update Updating 11 User Status					Cancel	Jun 22, 1992	~ × ±	¢ •
	Dave Wunsch	success	+30066@simulator.amazonses.com	Accepted	Automation	2	30066	(+61) 295078635	Aug 12, 1968	2	¢ •
	Dawn Davis	success	+30067@simulator.amazonses.com		Automation	8	30067	(+61) 298283957	Sep 19, 2001	8	¢ -
	Brooklyn Fritsch	success	+30068@simulator.amazonses.com		Automation	22	30068	(+61) 295023796	Feb 22, 1947	8	Q *
	Dovie Kirlin	success	+30069@simulator.amazonses.com		Automation	8	30069	(+61) 297808178	Jul 25, 1990	8	Q •
	Niko Jenkins	success	+30070@simulator.amazonses.com		Automation	8	30070	(+61) 296041004	Nov 3, 1988	8	Q •
	Zola Luettgen	success	+30071@simulator.amazonses.com		Automation	2	30071	(+61) 296666091	Apr 21, 1963		¢ •
	Evert Kohler	success	+30072@simulator.amazonses.com		Automation	8	30072	(+61) 295193487	Jun 22, 1998	8	¢ •
	Mallory Murazik	success	+30073@simulator.amazonses.com		Automation	ø	30073	(+61) 295001925	May 5, 1988		¢ •
	Terrell Quitzon	success	+30074@simulator.amazonses.com	Rejected	Automation	8	30074	(+61) 297292868	Sep 7, 1957	8	¢ *
	Showing 1 to 10 of 11 r	results							Per Page 10 🗢	1	2 > >

Updates to the Bulk Import of Role Offers

The Bulk Import of Role Offers has been enhanced so that all data fields are able to be imported now. You can access this via the Actions off the Role Offers list, within the Headcount module, similar to all other Imports across the Rosterfy platform

🗟 rosterfy	Events	Users Heado	ount Communication						a	. 0 🖴
	Admin	/ Headcount / Role	offers / List	Import						
				Before you upload your file, make sure the file is ready to b	e imported.					
cations ble offers	Ro	ole offers		You can download a sample file below after you choose an is recommended	action. Excel					Create
	Acti	ons • Select all O i	Role offers selected	E EXCEL				Search	۹	
	ID 0	Functional Area	Job Title 🔶 I	c File *		nt Demand	0 Publish	Demand	Overview	
	29	Security	mutta	Multiple JT to existing FA and Existing Location.xlsx	Browse		No	40	-	
	27	susy	kada I	Supported file types: .xis, .csv and .txt Action *			No	10		4 ¢ ·
	26	Security	manager sec	Create	× Y		No	10	•	4 ¢ ·
	22	Security	Lift opr	Create missing parameters	0		No	10		a b ·
	21	Security	Door Man 1	a Default Functional Area	0		No	10		w 0 -
	20	Mainta	janiator123 <mark>4</mark> t	п	× ¥		No	10		a b ·
	19	Mainta	janiator t	ar Default Location	0		No	10		۵ ¢ -
	18	Mainta	cleaner	Sydney	× v		No	10		a ¢-
	17	Mainta	Repair	Upload	Cancel		No	10		a • •
	16	Transportation	Taxi driver	Velbourbne Clayton Default 0			Yes	100		<u>ت</u> ۵۰
	Show	wing 1 to 10 of 20 resu	its					Per Pa	ge 10 🗢 🗍	« « <mark>1</mark> 2 » »

Deleting Role Offers with Users - Warning and Permissions

Admins deleting Role Offers with Users still assigned, will be given a warning message prior to continuing.

🗟 rosterfy	Event	s Users Head		Banning Samini						۹	0	2
	Admi	in / Headcount / Rol	e offers / List									
	R	ole offers		There are 5 Users still	assigned to this Role	offer						Create
e offers				Continue			Cancel					
	A	tions Select none	1 Role offer selected						Search	۹ 1	T	
	D	Functional Area	Job Title	0 Location	Venue 🕴	User Type 🔅	Secondary Assignment Demand	🕴 Publish 🔅	Demand	Overview		
	16	Transportation	Taxi driver	Melbourbne	Clayton	Default	0	Yes	100	1	-	۰ د
	13	WHS	Stow	Default	Dandedong Mel1	Default	0	No	10		4	۰ م
	12	ιτ	System Admin	Default	Default	Default	0	Yes	5000		4	۰ م
	1	Default	English Language Teacher	Default	Default	Default	0	Yes	1		-	۰ م
	2	Default	Baker	Default	Default	Default	0	Yes	8		-	۰ پ
	3	Default	Airfield Operations Speciali	st Default	Default	Default	0	Yes	88		-	۰ م
	4	Default	Plasterer OR Stucco Mason	Default	Default	Default	0	Yes	94		-	۰ م
	5	Default	Microbiologist	Default	Default	Default	0	Yes	17		-	۰ م
	6	Default	Tax Preparer	Default	Default	Default	0	Yes	47		4	۰ م
	7	Default	Business Manager	Default	Default	Default	0	Yes	24		-	¢٠
	Sh	owing 1 to 10 of 13 res	ults						Per Page	10 e «	< 1	2 >



This also now can be controlled and turned off - i.e. particular Admin users may be denied the access to be able to delete any Role Offers with Users still assigned. This is controlled via settings on Permission Roles, similar to all other Permission Roles, as per below. These Admins will then not be allowed to proceed with deletion.

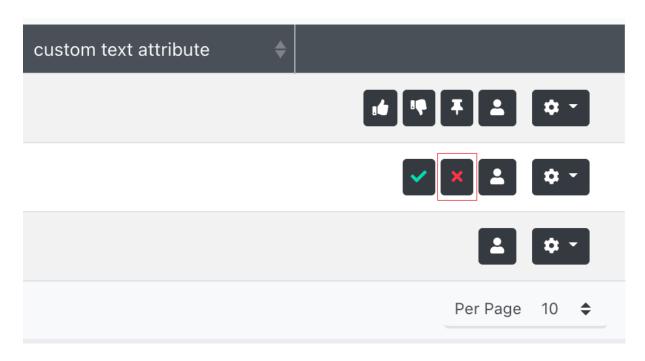
🗟 rosterfy	Events	Users	Headcount	Communications	Reports	Settings	۹	0	2	+
SETTINGS (Admin	Settings	/ Advanced / F	Permission Roles / Up	date Permissi	ion Role				
Organization Settings				Communication						
Billing				E 🛃 EAV						
Accounts				Event Vent						
Attributes				E 🗹 Form						
Advanced ~				E 🖌 Import						
Permission Roles				E 🛃 Rewards & recog E 🖌 Reports	gnition					
				E 🗹 Training						
 User Checkpoint 				E 🛃 User						
Automations				🛛 🛃 Webhook						
Integrations				Unreleased						
Certificates				🗄 😑 System Limits						
				E Headcoun	t					
 Webhook 				🕀 📃 Role						
			8	🛛 🕑 Integration						
	Sav	ve								
	Per	missio	n Role Us	ers					O Add	
							Search	Q	т	o
	Name			🗘 Email	1	Date/Time Added			÷	
	Admin	Testing		testir	ng+admin2010	01@rosterfy.com			•	-

HEADCOUNT	Events	Headcount / Role	count Communication:	Warnin	9							~	
Functional Areas	Admin	n / Headcount / Role	oriers / List	There are	e 5 Users still assi	aned to this R	ole offer						
Locations Role offers	R	ole offers		Contin		,		Cancel					Create
Role offers	Act	tions - Select all 0	Role offers selected								Search	٩	.
	ID 0	Functional Area	Job Title	¢	Location	Venue 🕴	User Type 🛛	Secondary Ass	ignment Demand	0 Publish 0	Demand	Overview	
	16	Transportation	Taxi driver		Melbourbne	Clayton	Default	0		Yes	100	1	0.01
	12	п	System Admin		Default	Default	Default	0		Yes	5000		
	1	Default	English Language Teac	her	Default	Default	Default	0		Yes	1		
	2	Default	Baker		Default	Default	Default	0		Yes	8		
	3	Default	Airfield Operations Spe	cialist	Default	Default	Default	0		Yes	88		
	4	Default	Plasterer OR Stucco M	ason	Default	Default	Default	0		Yes	94		w ¢+

R rosterfy

Not Approved Role Offer Status Added

When Role Offers are 'Not Approved' by Admins (hitting the red X button) this will move the Role Offer to a 'Not Approved' Status.



े rosterfy	Events Users Headcour	t Communications Reports Settings			୦ ଡ 🛥
	Admin / Headcount / Role of	Belle Goyette			
	Edit Role offer 🖉	< Previous View Pr	ofile	Next >	ole offer O Add From Viable Users
	Pick Users	General Custom Attributes			
	습 WHS	Status* Pre-assigned		^	:_: 4/2
	Actions • Select all 0 Use	Select one			Search Q T 🗖
	Name	Pre-assigned Not Approved		me Added	÷
	Brannon Schultz	Assigned Pending		8-17 01:23:25	± •
	Layla Huels	Accepted Confirmed		8-17 01:23:25	# 4 # £ ©
	Solon Jenkins	Complete Declined		21-08-17 01:23:26	× × ± ¢
	Bria Lakin	Removed Expired		21-08-17 01:23:26	~ × ± ¢
	Adolfo Will	Waitlist		1-08-17 01:23:26	± •
	Zola Dibbert	success+151@simulator.amazonses.com	Pre-assigned	2021-08-17 01:23:26	4472 0
	Belle Goyette	success+152@simulator.amazonses.com	Pre-assigned	2021-08-17 01:23:26	
	Ambrose Mante	success+153@simulator.amazonses.com	Pre-assigned	2021-08-17 01:23:26	
	Maribel Brekke	success+154@simulator.amazonses.com	Waitlist	2021-08-17 01:23:27	± •
	Tyrell Zulauf	success+155@simulator.amazonses.com	Assigned	2021-08-17 01:23:27	✓ × ± ≎
	Showing 1 to 10 of 11 results				Per Page 10 🗢 🤘 🗸 1 2 >

Role Offer Complete Feedback Form

When a user has completed a role, they now can access a feedback form in the portal. This can be used to provide an opportunity to upload data or ask the user questions based on the role.

Reference rosterfy

Update Role offer Amusement Attenc	• English (United States)	5 🎼 X V					
General Demand Crit	eria Settings Custom Attributes						
Choose a Training	Aircraft Engine Specialist 🗙		\$				
Certificate 1	Select one	🗙 🐦 Pr	review				
Accept Form	Select one	:	×¥				
Reject Form	Select one	:	× Y				
Complete Role offer Form ()	Role Offer Complete Form	:	× Y				
Enable Offer Expiry 3							
Save							

Role offers	
Amusement Attendant	Feedback Completed
My Training	
Aircraft Engine Specialist (approx 19mins)	Start