

Product Release Notes for Rosterfy 2.0 – 28th May 2021

General	2
Address Lookup on Portal	2
IP Restrictions Available for Admin Accounts	4
Checkpoint is Displayed on User Listing	5
Automations	6
Expression of Interest Automations	6
Reporting	8
Scheduled Repeated Reports	8
Events and Shifts	9
Shift Address Can Now Automatically Show the Venue Address	9

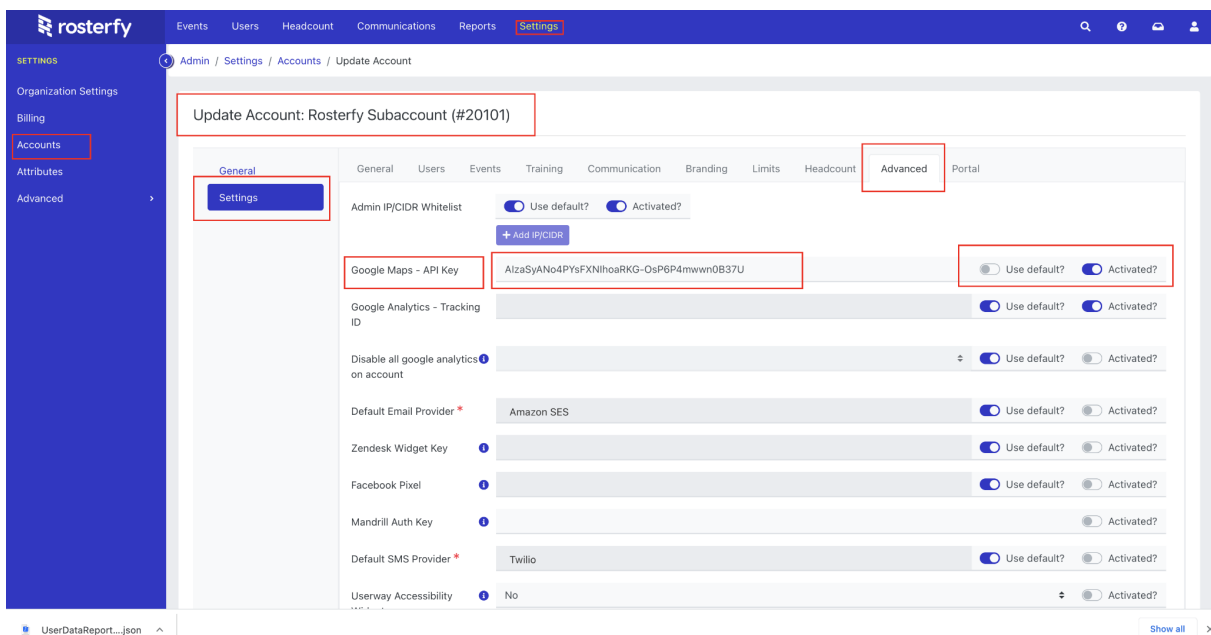
General

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

Address Lookup on Portal

With address fields now, Admins can add in a google maps API, and have the address field auto-complete.

Please see below steps (on the highest level account) to update subaccounts and include google maps API.



Update Account: Rosterfy Subaccount (#20101)

General Users Events Training Communication Branding Limits Headcount **Advanced** Portal

Admin IP/CIDR Whitelist ☒ Use default? ☒ Activated? [+ Add IP/CIDR](#)

Google Maps - API Key ☐ Use default? ☒ Activated?

Google Analytics - Tracking ID ☒ Use default? ☒ Activated?

Disable all google analytics on account ☒ Use default? ☐ Activated?

Default Email Provider * ☒ Use default? ☐ Activated?

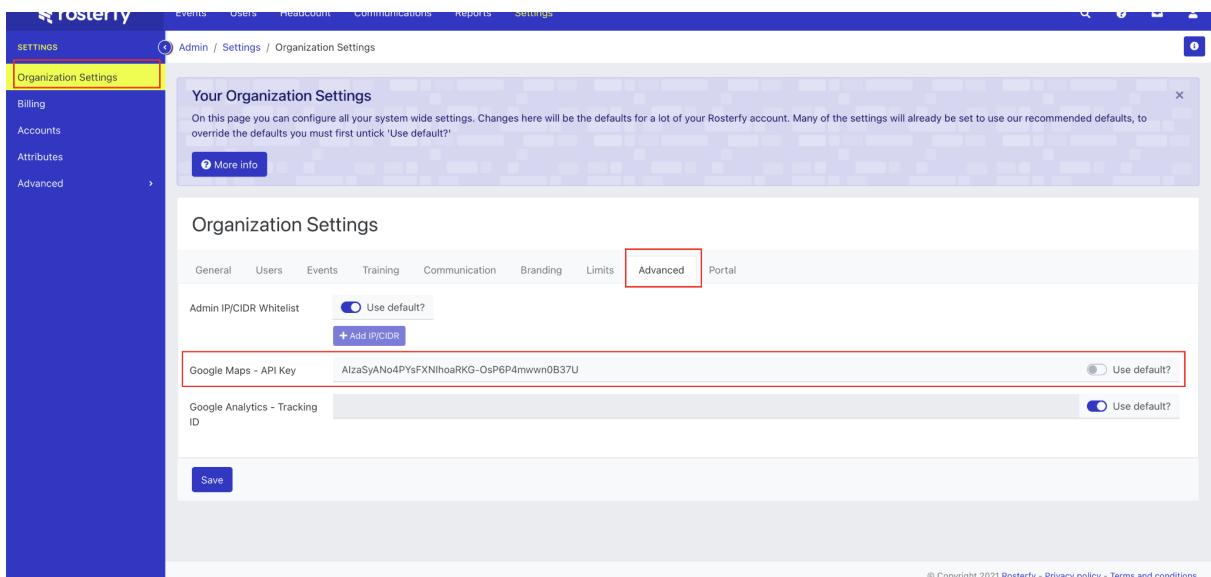
Zendesk Widget Key ☒ Use default? ☐ Activated?

Facebook Pixel ☒ Use default? ☐ Activated?

Mandrill Auth Key ☐ Use default? ☐ Activated?

Default SMS Provider * ☒ Use default? ☐ Activated?

Userway Accessibility ☒ Use default? ☐ Activated?



Your Organization Settings

On this page you can configure all your system wide settings. Changes here will be the defaults for a lot of your Rosterfy account. Many of the settings will already be set to use our recommended defaults, to override the defaults you must first untick 'Use default?'

[More info](#)

Organization Settings

General Users Events Training Communication Branding Limits **Advanced** Portal

Admin IP/CIDR Whitelist ☒ Use default? [+ Add IP/CIDR](#)


Google Maps - API Key ☐ Use default?

Google Analytics - Tracking ID ☒ Use default?

[Save](#)

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Rosterfy Testing

Dashboard

Notifications 5

My profile

My Availability

Training

Events

ut ratione aperiam

Subaccounts

News Article

Event History

Quia ea corrupti mollitia dolorum magnam optio.

Est cupiditate aspernatur assumenda inventore molestiae soluta.

Rewards

Contact us

1

Portal / Form

Address

Lookup Address

Look up a location to pre-fill address fields

Street Address

City/Town

Zip Code

State

Country


custom_eav_0

custom_eav_select_1

Select one

custom_eav_multiselect_1

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Rosterfy Testing

Dashboard

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ut ratione aperiam

Subaccounts

News Article

Event History

Quia ea corrupti mollitia dolorum magnam optio.

Est cupiditate aspernatur assumenda inventore molestiae soluta.

Rewards

Contact us

1

Portal / Form

Address

Lookup Address

1/5

1-50 50th Avenue Long Island City, NY, USA

Vor der Schanz 1-5 Ginsheim-Gustavsburg, Germany

gen. Karola Kniaziewicz 1/5 1-502, Poland

1-55 Borden Avenue Long Island City, NY, USA

Calea Victoriei 1-5 Bucharest, Romania

powered by Google

State

Country

custom_eav_0

custom_eav_select_1

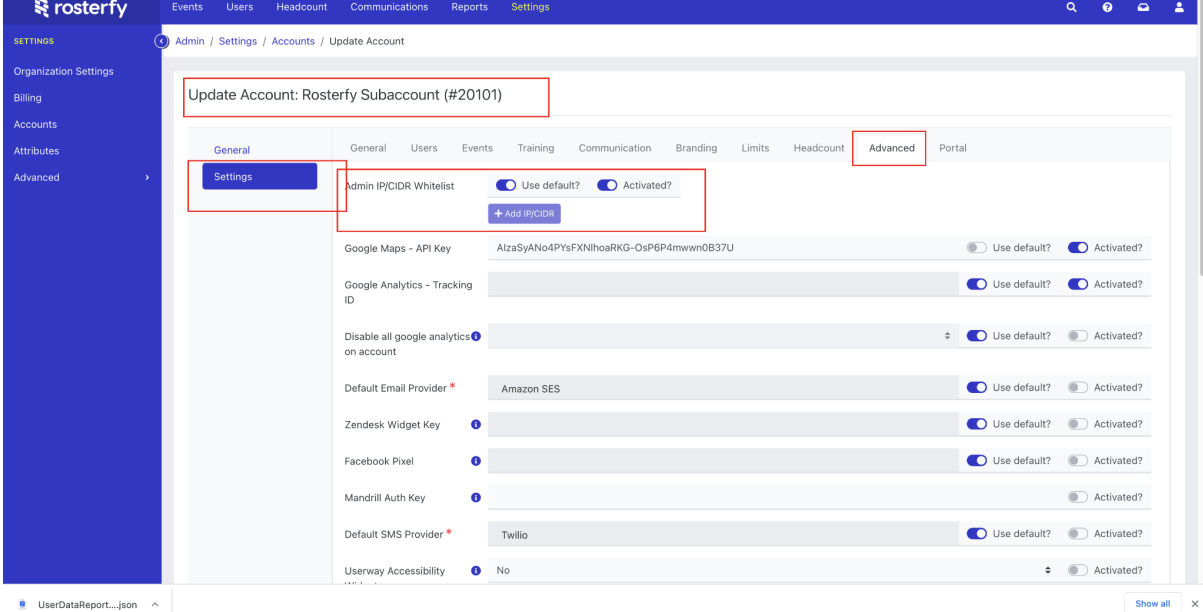
Select one

custom_eav_multiselect_1

IP Restrictions Available for Admin Accounts

Accounts can be set up so that, for security purposes, Admins are only able to log in from a particular IP Address.

This will be controlled by the highest level account, as per updating account settings screenshots below:



Update Account: Rosterfy Subaccount (#20101)

General Users Events Training Communication Branding Limits Headcount **Advanced** Portal

Settings

Admin IP/CIDR Whitelist ☒ Use default? ☒ Activated? [+ Add IP/CIDR](#)

Google Maps - API Key AlzaSyANo4PyfFXNIhoARKG-OsP6P4mwmn0B37U ☐ Use default? ☒ Activated?

Google Analytics - Tracking ID ☒ Use default? ☒ Activated?

Disable all google analytics on account ☒ Use default? ☐ Activated?

Default Email Provider * Amazon SES ☒ Use default? ☐ Activated?

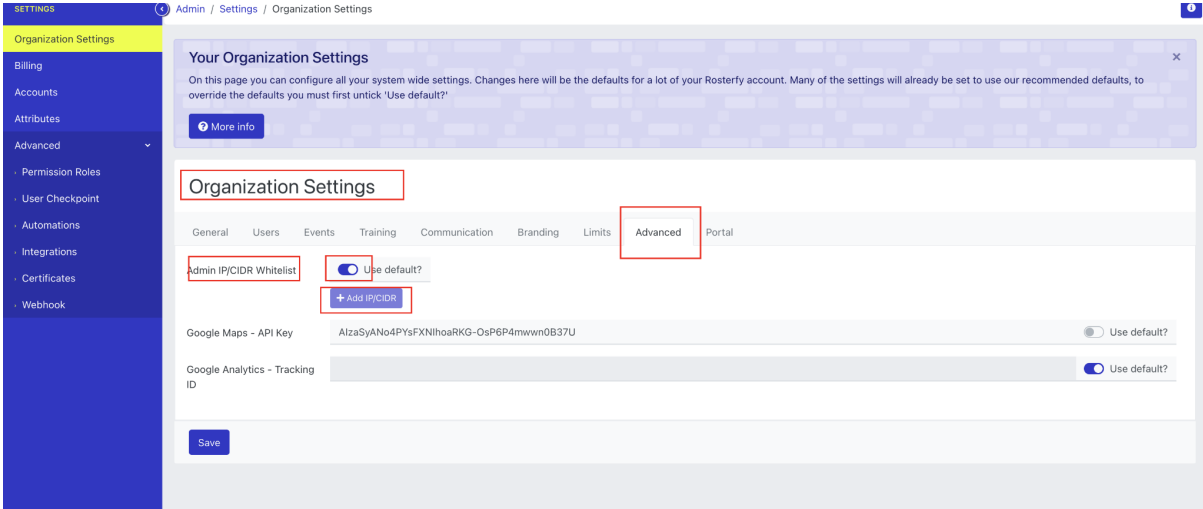
Zendesk Widget Key ☒ Use default? ☐ Activated?

Facebook Pixel ☒ Use default? ☐ Activated?

Mandrill Auth Key ☐ Use default? ☐ Activated?

Default SMS Provider * Twilio ☒ Use default? ☐ Activated?

Userway Accessibility No ☐ Use default? ☐ Activated?



Admin / Settings / Organization Settings

Organization Settings

Your Organization Settings

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[More info](#)

General Users Events Training Communication Branding Limits **Advanced** Portal

Admin IP/CIDR Whitelist ☒ Use default? [+ Add IP/CIDR](#)

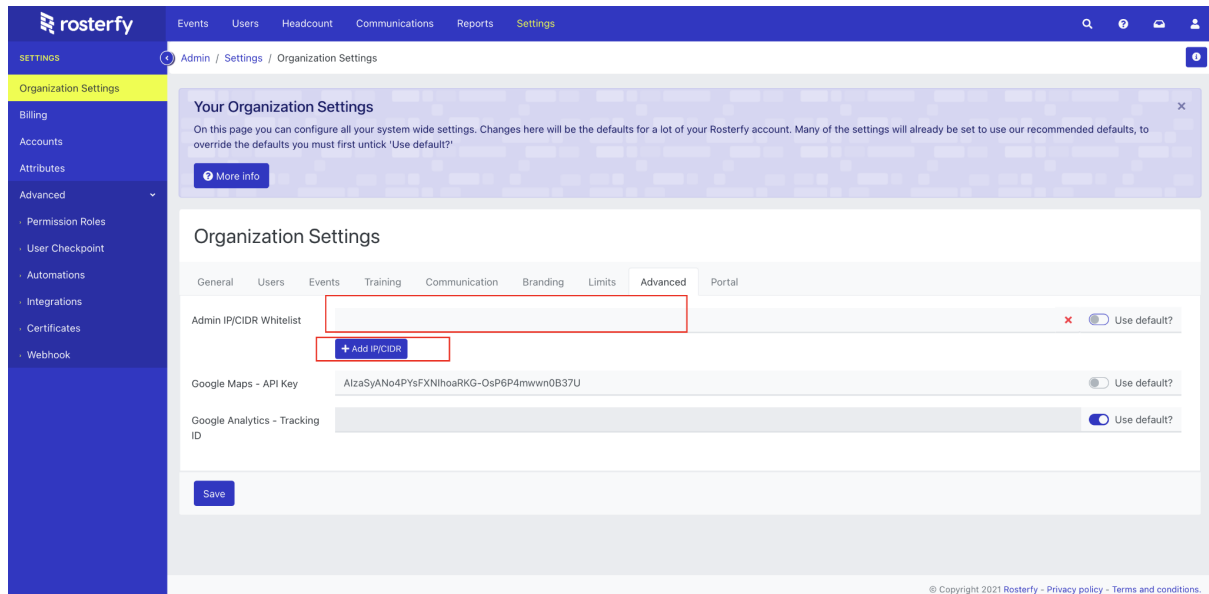
Google Maps - API Key AlzaSyANo4PyfFXNIhoARKG-OsP6P4mwmn0B37U ☐ Use default?

Google Analytics - Tracking ID ☒ Use default?

[Save](#)

28th May 2021

Adding in your desired IP address here:



rosterfy Events Users Headcount Communications Reports Settings

SETTINGS Admin / Settings / Organization Settings

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[More info](#)

Organization Settings

General Users Events Training Communication Branding Limits **Advanced** Portal

Admin IP/CIDR Whitelist ✖ ☐ Use default?

[+ Add IP/CIDR](#)

Google Maps - API Key AlzaSyANo4PysFXNihoaRKG-OsP6P4mwwn0B37U ☐ Use default?

Google Analytics - Tracking ID ☒ Use default?

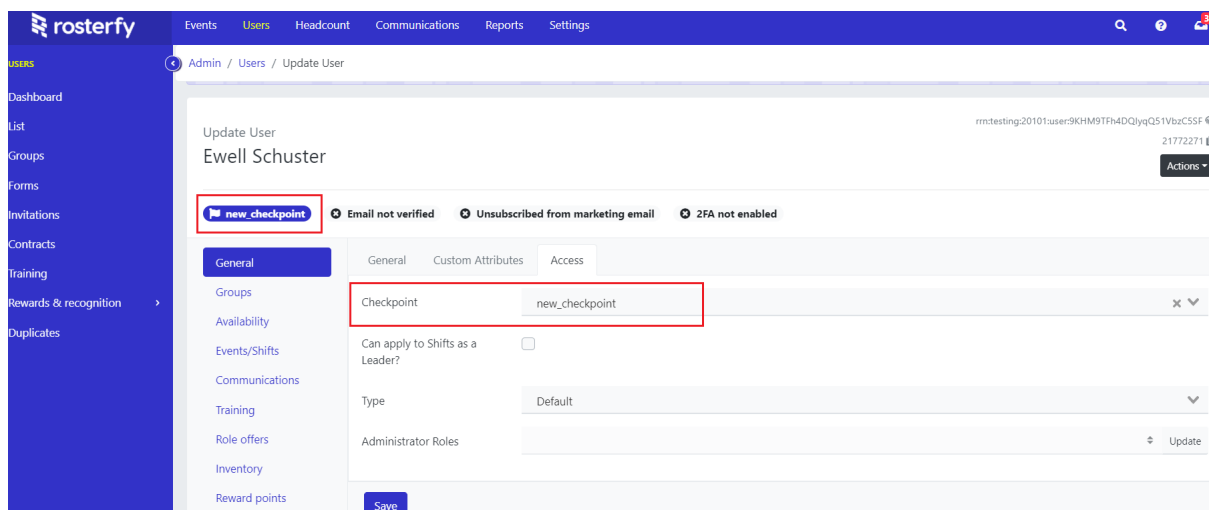
[Save](#)

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Checkpoint is Displayed on User Listing

A User's Checkpoint is now displayed on the User Profile Header. This will help Admins more clearly understand the status of a User while updating their profile.

See below:



rosterfy Events **Users** Headcount Communications Reports Settings

Admin / Users / Update User

Update User

Ewell Schuster

rmtesting20101user9KHM9TFh4DQlyqQS1VbaC5SF 21772271 [Actions](#)

new_checkpoint ☒ Email not verified ☒ Unsubscribed from marketing email ☒ 2FA not enabled

General General Custom Attributes Access

Groups

Availability

Events/Shifts

Communications

Training

Role offers

Inventory

Reward points

Checkpoint new_checkpoint ✖ ✓

Can apply to Shifts as a Leader? ☐

Type Default ✓

Administrator Roles ⬇ [Update](#)

[Save](#)

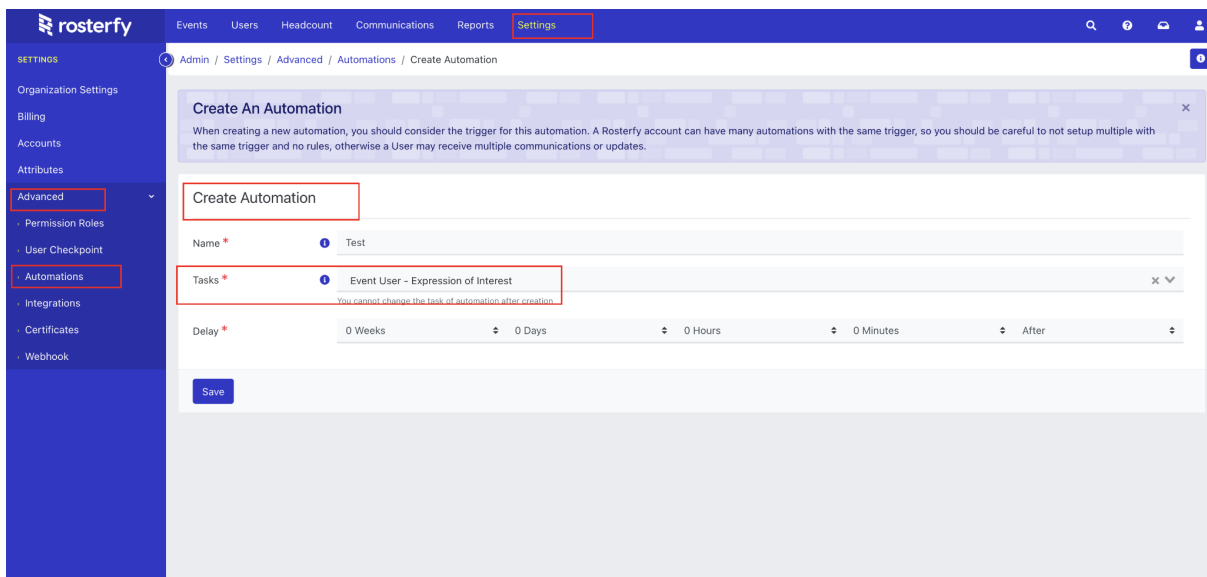
Automations

Expression of Interest Automations

The ability has been updated for an 'Expression of Interest' task to Automatically send an email to the Event Leader. This email is based on whatever template selected.

This will trigger an Automation whenever a Candidate submits an 'Expression of Interest' form for an Event, from the Candidate Portal.

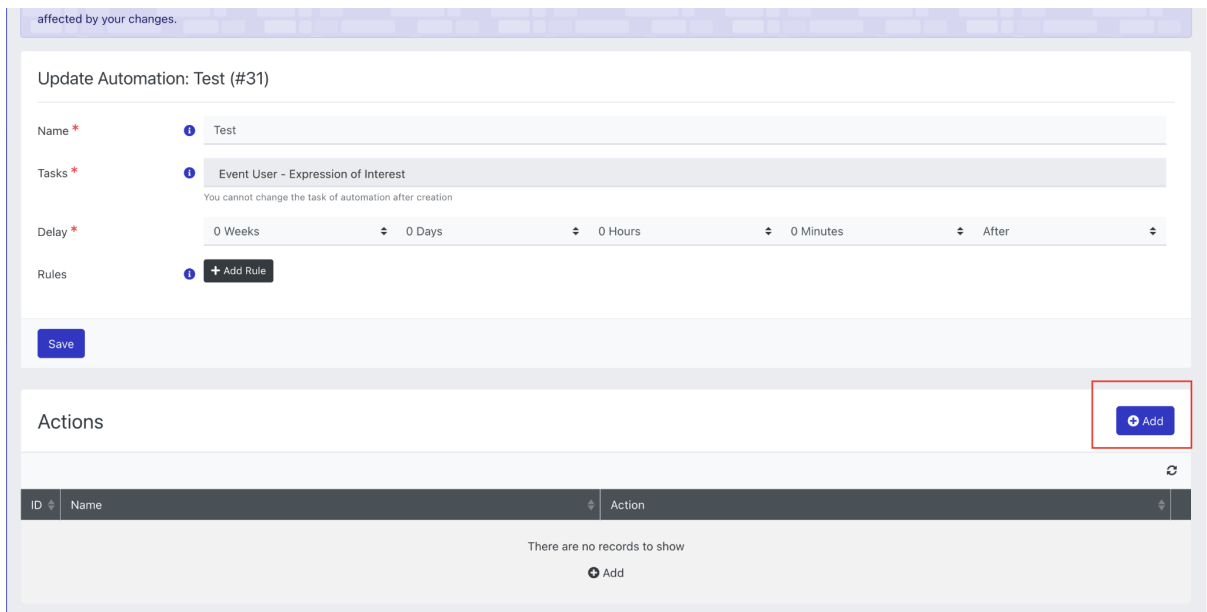
See screenshots below:



The screenshot shows the 'Create An Automation' form in the Rosterfy Settings menu. The 'Settings' tab is selected in the top navigation bar. The left sidebar shows the 'Automations' section under 'Advanced'. The form has the following fields:

- Name ***: Test
- Tasks ***: Event User - Expression of Interest (Note: You cannot change the task of automation after creation.)
- Delay ***: 0 Weeks, 0 Days, 0 Hours, 0 Minutes, After

A 'Save' button is located at the bottom of the form.



The screenshot shows the 'Update Automation: Test (#31)' form in the Rosterfy Settings menu. The form has the following fields:

- Name ***: Test
- Tasks ***: Event User - Expression of Interest (Note: You cannot change the task of automation after creation.)
- Delay ***: 0 Weeks, 0 Days, 0 Hours, 0 Minutes, After
- Rules**: + Add Rule

A 'Save' button is located at the bottom of the form.

Below the form is an 'Actions' section with an '+ Add' button.

At the bottom, there is a table with the following columns: ID, Name, Action. The table is currently empty, and a message states: 'There are no records to show'. An '+ Add' button is located below the table.

Communications Reports Settings

Add Action

General Rules Options

Name *

t

Action *

Email to Event Leader x v

Delay *

0 Weeks 0 Days 0 Hours 0 Minutes 0 Min

Submit Cancel

Communications Reports Settings

Add Action

General Rules Options

Template *

Select one x v

Submit Cancel

0 Days 0 Hours 0 Minutes

For this Automation trigger to work, the 'Expression of Interest' needs to be available for an event:

Update Event
ecpoint

General | Advanced | Portal Visibility | Shift Defaults | Custom Attributes

General

Event Leaders

Post Event

Reward points

Shifts

Expression of Interest

Type * Event

Timezone * (GMT +00:00) UTC

Portal Banner Image Choose an image Browse
Recommended size 1200px wide by 300px high

Portal Grid Image Choose an image Browse
Recommended size 500px wide by 300px high

Expression of Interest xp aj

Maximum Shift applications per User * Select one
Event User Interaction
exp aj

Minimum Shift applications per User * 0

Minimum gap between Shift applications per User in 0
Negative for overlapping

Reporting

Scheduled Repeated Reports

Admins can now schedule a report to run and repeat, into the future. This can be accessed via the new 'When?' tab when updating or creating a new report.

Note - the system will default to a maximum of 1 scheduled report in your account

Note- you will need to speak to your Rosterfy CS team member to activate this functionality

rosterfy

Events Users Headcount Communications Reports Settings

Admin / Reports / Update Report

Update Report

Type Columns Filters Sorting When?

Schedule for later? ☒

Timezone * (GMT +10:00) Australia/Melbourne

Start date * dd/mm/yyyy Start time * --:--

Repeat every * 1 Days

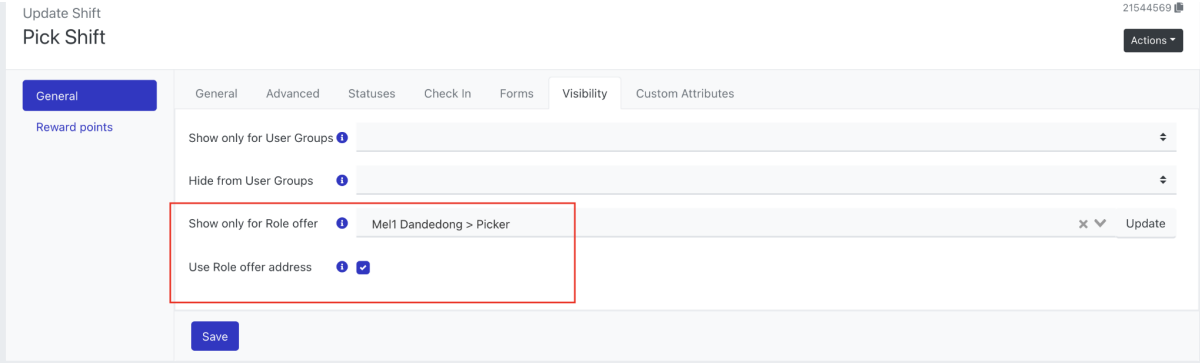
Previous Submit

Events and Shifts

Shift Address Can Now Automatically Show the Venue Address

On shifts, we have added a tick box under the 'visibility' within a shift to be able to use the Venue address of the Role Offer. This will be faster than typing in the Address if it is the same.

See this tick box below;



Update Shift
Pick Shift

21544569

Actions

General Advanced Statuses Check In Forms Visibility Custom Attributes

Reward points

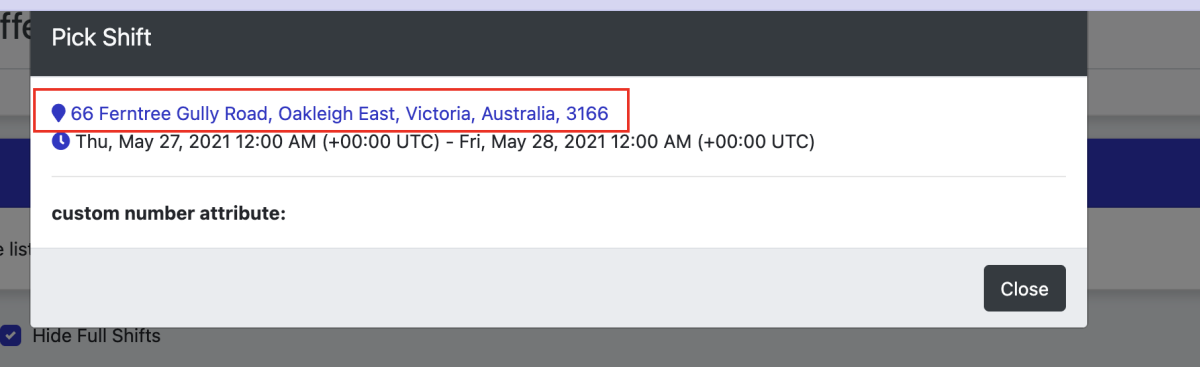
Show only for User Groups

Hide from User Groups

Show only for Role offer Mel1 Dandedong > Picker

Use Role offer address

Save



Pick Shift

66 Ferntree Gully Road, Oakleigh East, Victoria, Australia, 3166

Thu, May 27, 2021 12:00 AM (+00:00 UTC) - Fri, May 28, 2021 12:00 AM (+00:00 UTC)

custom number attribute:

Close

Hide Full Shifts