

Product Release Notes for Rosterfy 2.0

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General

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

Single Sign On - Small Update

A small update to logins - when an account has Single-Sign-On (SSO) enabled, the login page will have functions disabled that are not relevant, primarily password and 'forgotten your password?' fields.

Schedule Improvements

A number of improvements have been made in how the Rosterfy platform performs scheduled tasks, to reduce the delay in when they are expected.

In summary;

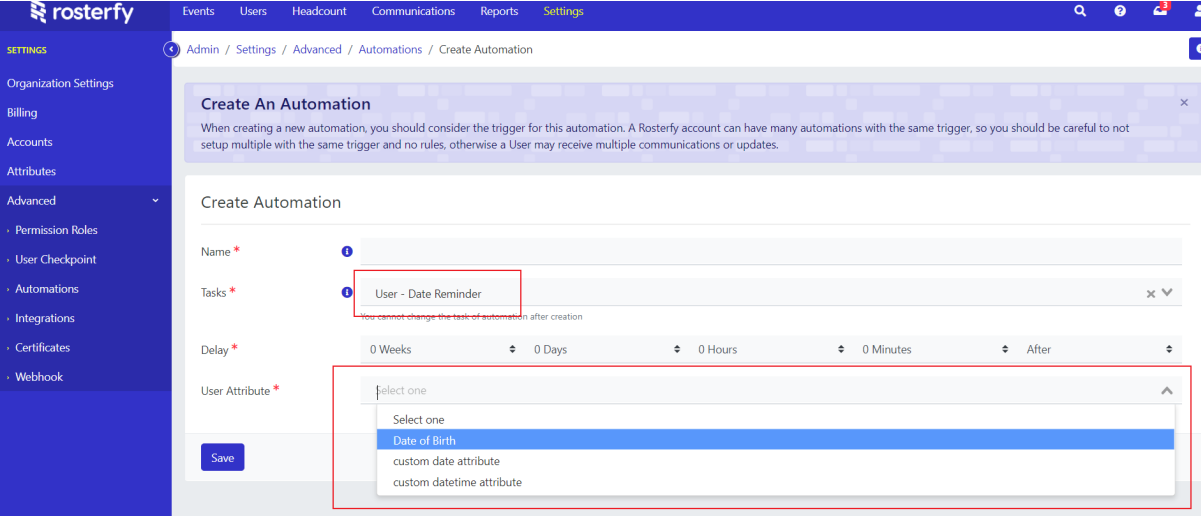
- Shift reminder emails - will run on 15 min intervals (the longest delay will be 14 mins)
- Scheduled Reports - will run on 15 min intervals (the longest delay will be 14 mins)
- Scheduled Communications - will run on 5 min intervals (the longest delay will be 5 mins)

Automations

New Automation Trigger - User Date Reminder Automation

A new Automation trigger has been added - 'User - Date Reminder'. This will allow Admins to build out Date Reminder automations against any User Attributes that are date fields.

This means that Automations can be built off dates - e.g. sending a happy birthday email to all your Users whenever it is their Date of Birth, etc.



rosterfy Events Users Headcount Communications Reports Settings

Admin / Settings / Advanced / Automations / Create Automation

Create An Automation

When creating a new automation, you should consider the trigger for this automation. A Rosterfy account can have many automations with the same trigger, so you should be careful to not setup multiple with the same trigger and no rules, otherwise a User may receive multiple communications or updates.

Create Automation

Name *

Tasks * User - Date Reminder

Delay * 0 Weeks 0 Days 0 Hours 0 Minutes After

User Attribute * Select one

- Select one
- Date of Birth
- custom date attribute
- custom datetime attribute

Save

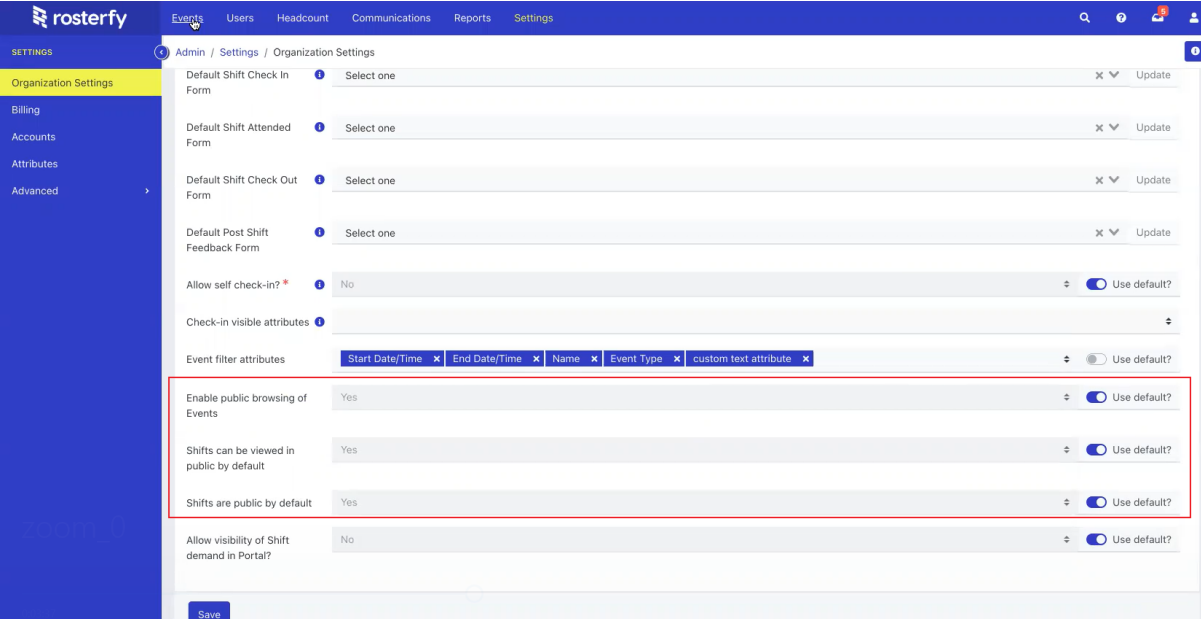
Events and Shifts

Public Browsable Shifts

Shifts are now able to be browsable by the public, i.e. people do not have to have a Rosterfy account to be able to see open shifts. They will still however be required to register with an account to actually ultimately apply or be placed onto a shift.

This must be turned on at 3 points:

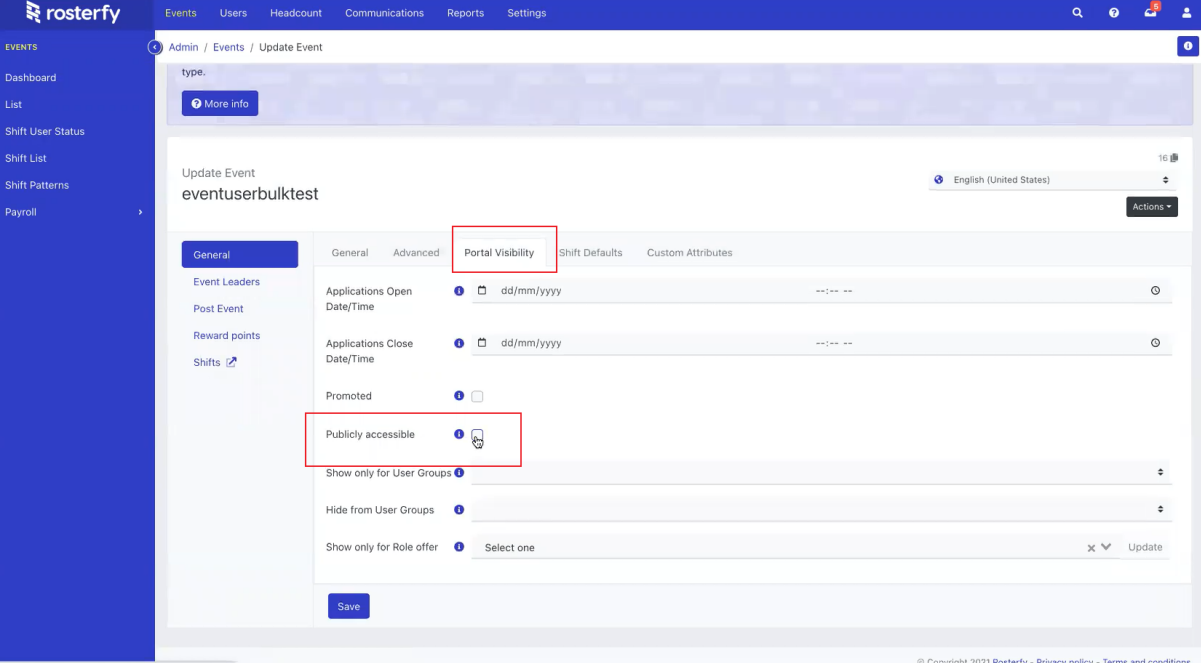
1. This is controlled on an account level by new settings under Settings > Organisation Settings > Events. This must be on your top level account, or please speak to your Rosterfy Customer Success manager for further help here
2. Then the setting must be turned on on the Event level under Portal Visibility
3. Finally at a Shift level, the Shift must have 'Shift Is Public' ticket under the Visibility tab (see 3 screenshots below)



The screenshot shows the Rosterfy web interface. The top navigation bar includes 'Events', 'Users', 'Headcount', 'Communications', 'Reports', and 'Settings'. The left sidebar lists 'SETTINGS' with sub-items: 'Organization Settings', 'Billing', 'Accounts', 'Attributes', and 'Advanced'. The main content area is titled 'Admin / Settings / Organization Settings'. It contains several settings for events, including 'Default Shift Check In Form', 'Default Shift Attended Form', 'Default Shift Check Out Form', and 'Default Post Shift Feedback Form'. Below these are 'Allow self check-in?' (set to No), 'Check-in visible attributes', and 'Event filter attributes' (with a list of attributes: Start Date/Time, End Date/Time, Name, Event Type, and custom text attribute). A red box highlights the following settings:

Setting	Value	Action
Enable public browsing of Events	Yes	Use default?
Shifts can be viewed in public by default	Yes	Use default?
Shifts are public by default	Yes	Use default?
Allow visibility of Shift demand in Portal?	No	Use default?

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



type.

Update Event
eventuserbulktest

English (United States)

Actions

General

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

Applications Open Date/Time dd/mm/yyyy

Applications Close Date/Time dd/mm/yyyy

Promoted

Publicly accessible

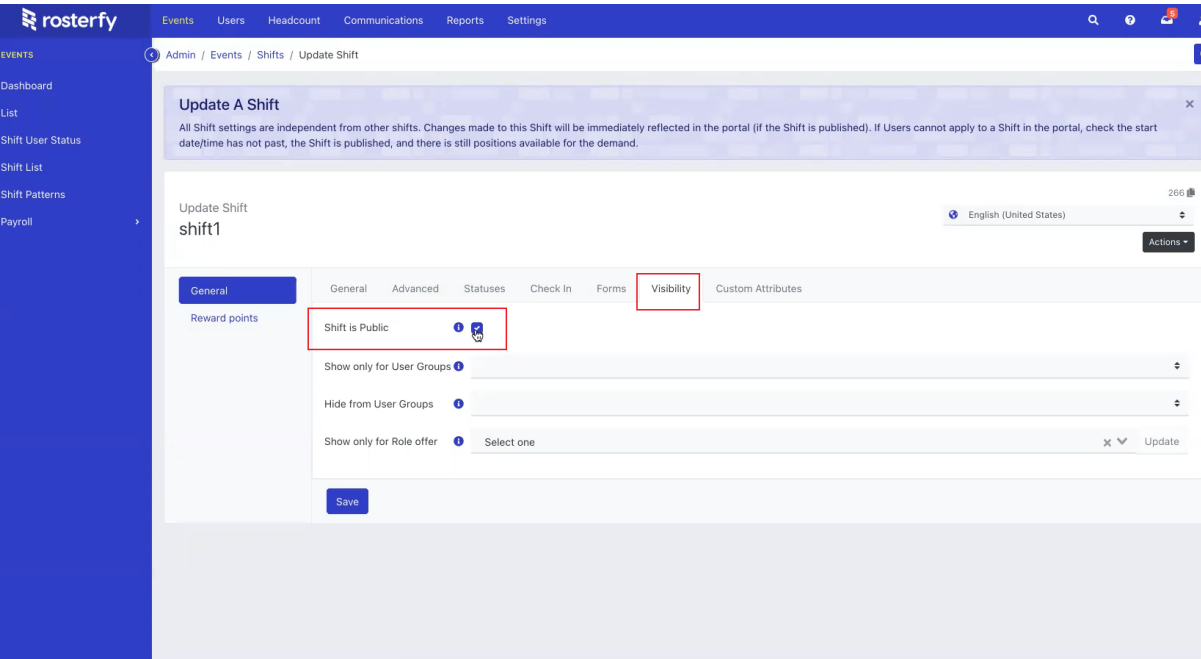
Show only for User Groups

Hide from User Groups

Show only for Role offer Select one

Save

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Update A Shift

All Shift settings are independent from other shifts. Changes made to this Shift will be immediately reflected in the portal (if the Shift is published). If Users cannot apply to a Shift in the portal, check the start date/time has not past, the Shift is published, and there is still positions available for the demand.

Update Shift
shift1

English (United States)

Actions

General

General Advanced Statuses Check in Forms **Visibility** Custom Attributes

Reward points

Shift is Public

Show only for User Groups

Hide from User Groups

Show only for Role offer Select one

Save

This will then generate a link, as per usual, except now it is accessible to the public. You can see below. In summary, this new feature will allow:

- Users to browse public events and associated shifts
- Users to filter for shifts
- If the Users are interested, they can register to the system , existing users can login to the system from the public event page
- When Users Log In / Register they will be seeing the Event they were browsing

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EventsUsersHeadcountCommunicationsReportsSettings

3

EVENTS

Admin / Events / Update Event

Event Leaders

Post Event

Reward points

Shifts

Applications Open Date/Time

03/10/2021

11:00 AM

Applications Close Date/Time

dd/mm/yyyy

--:-- --

Promoted

Publicly accessible

Shifts Publicly accessible

Show only for User Groups

Hide from User Groups

Show only for Role offer

Select one

Update

Save

https://sub.testing.rosterfy.com/event/gUvImMsbPix1ZbPhySl5CSWYmxsTm

Copy Link

event_in_future

test Details

2113 Quizon Key Apt. 820, Deontaecheater, Victoria, Australia, 23216-1243

Tue, Nov 2, 2021 11:00 AM - Tue, Nov 16, 2021 11:00 AM

Doloribus earum et non. Expedita consectetur in et dignissimos sint non omnis. Voluptatibus earum ut sint labore. Enim et aut ipsum hic quaerat.

Cumque voluptatem dolor quo est ut. Numquam asperiores dolor quia dolorem adipisci possimus provident. Dolores odio ut quisquam repellendus iusto quis aut.

Voluptatem ipsum dolore consequatur. Sunt qui numquam harum fuga minus alias veritatis. Quidem eveniet veritatis qui quia. Maiores eligendi nobis molestiae reiciendis magni.

custom number attribute:

Register

Already have an account? Log in

Show map

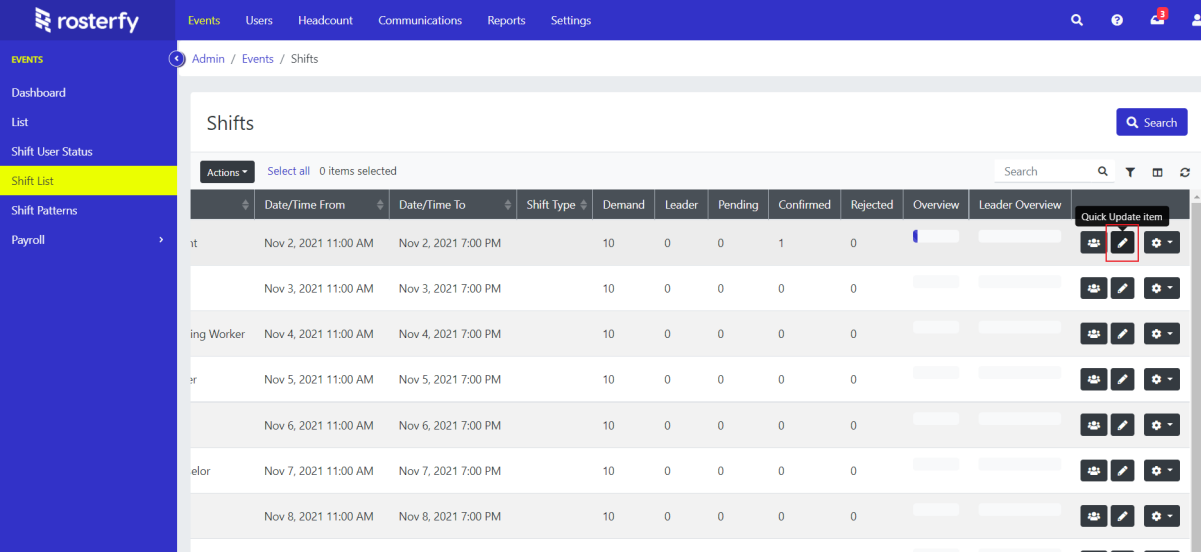
Available Shifts

From Jul 27, 2021

Quick Update of Shifts

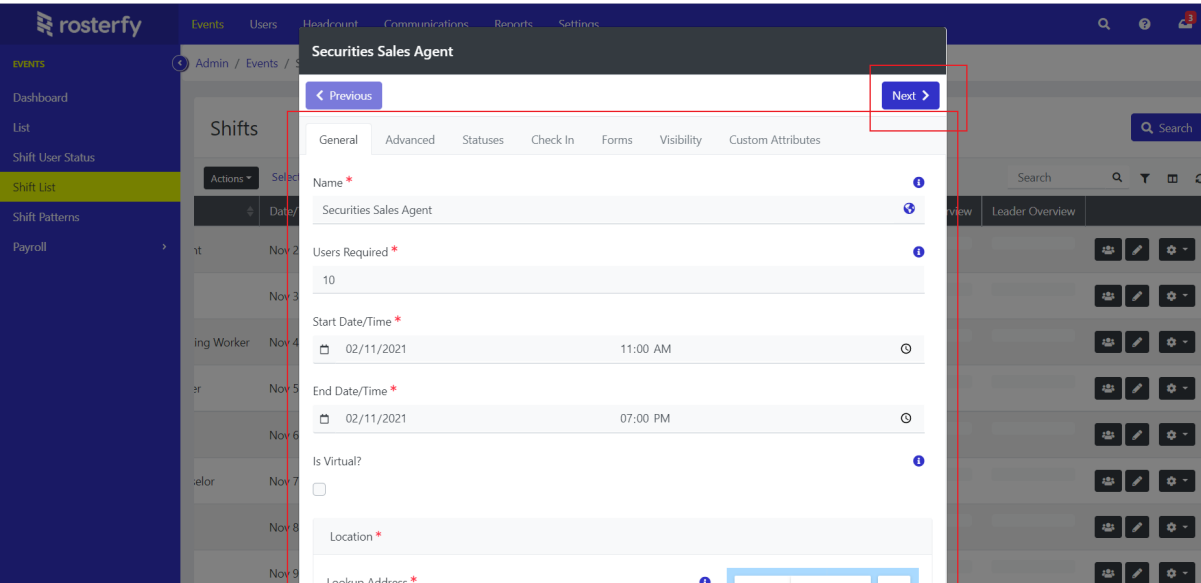
Similar to the Quick Update functionality available elsewhere in our platform, a Quick Update has been added to Shift List. This will enable Admins to more quickly update the details of a Shift on the Shift List, and also easily click Next to move onto the next shift.

This will be all Shifts across All Events by default, but Admins can use existing filter options if only a single event, date range, etc. is desired.



The screenshot shows the Rosterfy interface with the 'Shifts' list. The table has the following columns: Date/Time From, Date/Time To, Shift Type, Demand, Leader, Pending, Confirmed, Rejected, Overview, and Leader Overview. A 'Quick Update item' button is highlighted in the top right corner of the table.

	Date/Time From	Date/Time To	Shift Type	Demand	Leader	Pending	Confirmed	Rejected	Overview	Leader Overview
nt	Nov 2, 2021 11:00 AM	Nov 2, 2021 7:00 PM		10	0	0	1	0		
	Nov 3, 2021 11:00 AM	Nov 3, 2021 7:00 PM		10	0	0	0	0		
ing Worker	Nov 4, 2021 11:00 AM	Nov 4, 2021 7:00 PM		10	0	0	0	0		
er	Nov 5, 2021 11:00 AM	Nov 5, 2021 7:00 PM		10	0	0	0	0		
	Nov 6, 2021 11:00 AM	Nov 6, 2021 7:00 PM		10	0	0	0	0		
elor	Nov 7, 2021 11:00 AM	Nov 7, 2021 7:00 PM		10	0	0	0	0		
	Nov 8, 2021 11:00 AM	Nov 8, 2021 7:00 PM		10	0	0	0	0		



The screenshot shows the Rosterfy interface with the 'Shifts' list. A modal form is open for 'Securities Sales Agent'. The 'Next' button is highlighted in the top right corner of the modal.

Securities Sales Agent

General Advanced Statuses Check In Forms Visibility Custom Attributes

Name * Securities Sales Agent

Users Required * 10

Start Date/Time * 02/11/2021 11:00 AM

End Date/Time * 02/11/2021 07:00 PM

Is Virtual? ☐

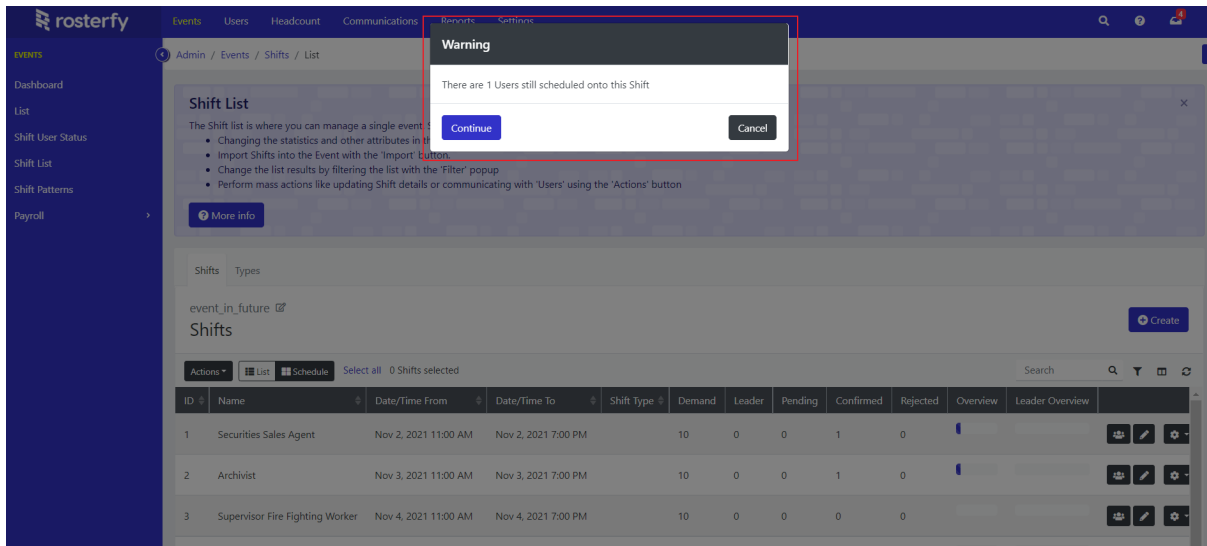
Location *

Lookup Address *

Delete Warning - Shifts with Users Assigned

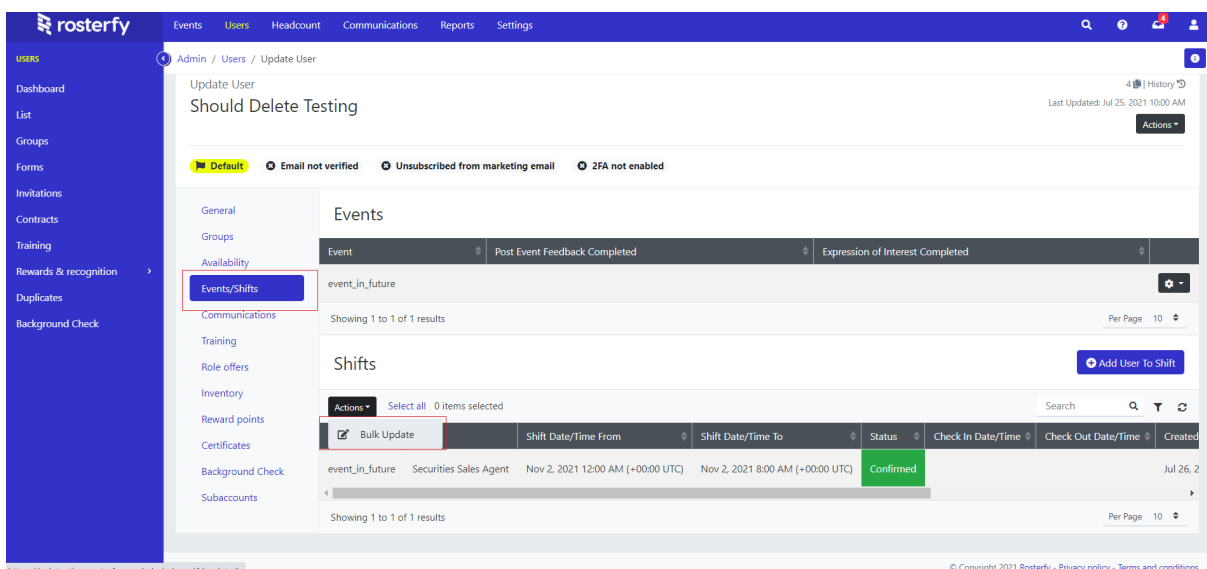
We have included an additional warning for whenever Shifts are being deleted, either manually or from Bulk Actions, so that Admins are aware of Shifts that are being deleted which are active with Users assigned.

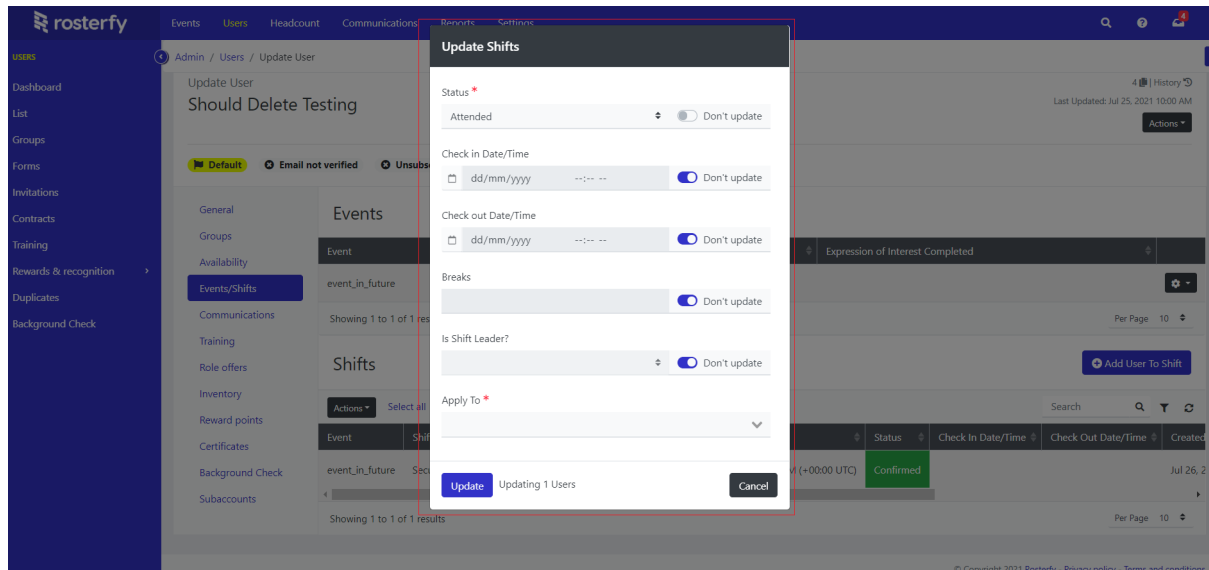
Additionally with Bulk Delete we will have the option for Admins to skip deleting Shifts with active Users assigned.



Bulk Update a User's Shifts from User Profile

Admins are now able to easily bulk-update shifts via a User profile, for faster updates applying onto a single User, via their profile.

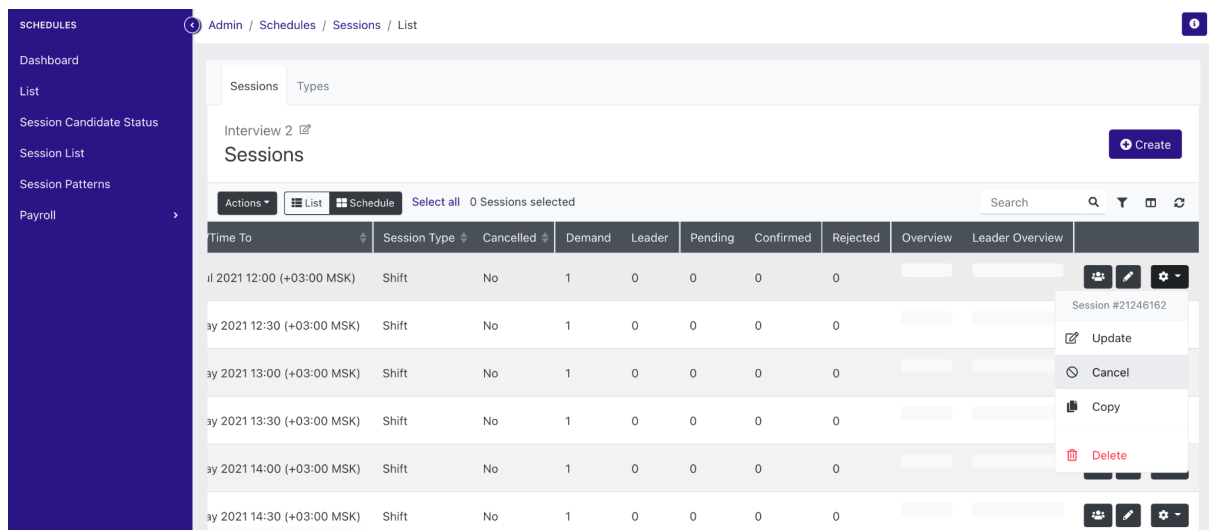




Cancel Shift Process

If you would like to cancel a shift, but not delete it from the system, there is now an option to 'cancel' a shift. Cancelling a shift also prompt you to send a notification (email) to the users that are scheduled onto the shift. You can choose to cancel a shift and not notify the users.

The advantage of cancelling a shift is it will stay in the admin console for you to reference in future and see who was on the shift. It also will be flagged / marked in the system to show you a shift is cancelled. Cancelling a shift is a permission that you can control so only some users can cancel shifts



21246474	Interview 41	11 May 2021 11:30 (+03:00 MSK)	11 May 2021 12:00 (+03:00 MSK)	Shift	No	1	0	0
21246475	Interview 42 Cancelled	30 Jul 2021 12:00 (+03:00 MSK)	30 Jul 2021 12:30 (+03:00 MSK)	Shift	Yes	1	0	0
21246476	Interview 43 Cancelled	29 Jul 2021 12:30 (+03:00 MSK)	29 Jul 2021 13:00 (+03:00 MSK)	Shift	Yes	1	0	0
21246477	Interview 44 Cancelled	29 Jul 2021 13:00 (+03:00 MSK)	29 Jul 2021 13:30 (+03:00 MSK)	Shift	Yes	1	0	0
21246478	Interview 45	11 May 2021 13:30 (+03:00 MSK)	11 May 2021 14:00 (+03:00 MSK)	Shift	No	1	0	0


Interview May - Interview 42 [🔗](#)

Candidates

⚠️ Session Cancelled

📅 30 Jul 2021 12:00 (+03:00 MSK) to 30 Jul 2021 12:30 (+03:00 MSK) 👤 1

Actions ▼ Select all 0 Candidates selected Search 🔍 🔼 🔽 🔄

Picture	Candidate Name	Status	Check in Date/Time	Check out Date/Time	
	Chris Grant	Rejected	Check in		✅ ❌ 👤 ⚙️

Showing 1 to 1 of 1 results Per Page 10

Limit Shift to many role offers

You can now limit a shift to many role offers. This means in your shift update, visibility tab, it is now a multi select to share the shift with users of many roles. This could be helpful if you have a training session that requires people from many roles to attend.

General

[Schedule Leaders](#)

[Post Schedule](#)

[Reward points](#)

[Sessions](#) [🔗](#)

General Advanced Portal Visibility Session Defaults

Applications Open Date/Time 📅 mm/dd/yyyy --:-- -- 🕒

Applications Close Date/Time 📅 mm/dd/yyyy --:-- -- 🕒

Promoted 📁 ☐

Show only for Candidate Groups 📁 Interview Group 1 ✕

Hide from Candidate Groups 📁 Waiting list ✕ Interview Group 2 ✕

Show only for Role offer 📁 Domodedovo airport > VIP Welcome Desk Service ✕ Luzhniki Stadium > Accreditation center ✕ Luzhniki Stadium > Photofile Centre ✕

Use Role offer address 📁 ☐

03 August 2021



Communications

Large Groups of Emails will be Auto-split into Smaller Batches

Large groups of emails will be split automatically into smaller jobs, which will help Admins run larger groups of emails. Large groups of emails will be split into batches of 1000 and run separately.

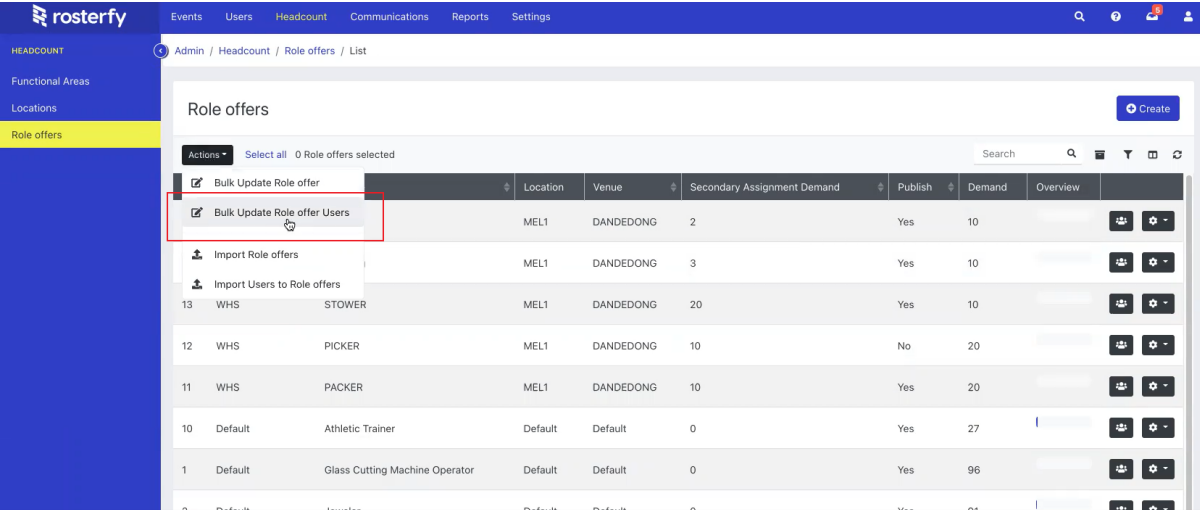
If you plan on sending more than 1000 emails at a time however, please inform your Rosterfy Customer Success manager so they are able to help you plan for this, and discuss the limitations / restrictions of the system.

Headcount

Bulk Role Offer - Improvements

A number of additional improvements to the Role Offer, with a number of additional bulk-update actions available to admins. Admins are now able to:

- trigger “Admin console type” Automations (selectable via the drop down, see second screenshot below)
- change the Role Offer user status to another status
- do the above 2 actions simultaneously
- trigger Role Offer type automations (i.e. automations set up to trigger based on Role Offer status updates - these would normally trigger if action was performed manually)



The screenshot displays the Rosterfy web application 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 sub-links for Functional Areas, Locations, and Role offers. The main content area is titled 'Role offers' and includes a 'Create' button. Below the title, there is an 'Actions' dropdown menu with the following options: 'Bulk Update Role offer', 'Bulk Update Role offer Users' (highlighted with a red box), 'Import Role offers', and 'Import Users to Role offers'. The table below lists several role offers with columns for Location, Venue, Secondary Assignment Demand, Publish, Demand, and Overview.

Location	Venue	Secondary Assignment Demand	Publish	Demand	Overview
MEL1	DANDEDONG	2	Yes	10	
MEL1	DANDEDONG	3	Yes	10	
MEL1	DANDEDONG	20	Yes	10	
MEL1	DANDEDONG	10	No	20	
MEL1	DANDEDONG	10	Yes	20	
Default	Athletic Trainer	Default	Default	0	Yes
Default	Glass Cutting Machine Operator	Default	Default	0	Yes
Default	Jeweler	Default	Default	0	Yes

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EventsUsersHeadcountCommunicationsReportsSettings

ADMIN

Admin / Headcount / Role offers

Role offers

Actions Select all 0 Role offers

ID	Functional Area
15	WHS
14	WHS
13	WHS
12	WHS
11	WHS
10	Default
1	Default
2	Default

Update Role offer Users

Apply update to Role offer Users on selected status of

Pending Confirmed Removed

Update status

☒

Update Role offer Users on selected Role offer to

Assigned

Select Automation

Select one

Select one

test

test 1

Bulk Update Role offer Users

Cancel

Search

Publish Demand Overview

Yes	10	
Yes	10	
Yes	10	
No	20	
Yes	20	
Yes	27	
Yes	96	
Yes	91	