

### 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

### General

#### **Admin Portal Redesign and Restructure**

Admins will notice the Rosterfy Site has had an improved design! We're excited to be pushing out a facelift and some improved designs. The changes are around;

- An updated styling, and general UI improvements
- Improved and updated structure and location, moving the top navigation to the side, and slightly reordering the location of menu items in a more intuitive fashion

To help the transition, the structural updates can be toggled on and off, which will remain an option for some months. Please see the video below for the best explanation;

## https://www.youtube.com/watch?v=zy0JL-4Alow

R rosterfy	Admin / Events / <u>List</u>						Search	۹	0 L	<u>8</u>
Dashboard	Events									
🛱 Events 🗸 🗸	Your Events list									×
Events	The Event list shows all the Events created	d in this account. You can also see a brief overview	v of the recruitment of Users to the Event in the column	ns. Filters are maintain	ed when you lea	ve and come back t	o this list, so it is a	always worth check	ng filters if	
Event Templates	you can't see a Event you are looking for	to view the shifts on an event, click the	ton							
Shifts	Events Types									
Shift User Status	Events								<b>•</b> 0	reate
Shift Patterns	Actions • HEList #Calendar Select	all 0 Events selected   You have 1 filter applied	Clear current filters					Search	۹ 🔽	
얨 Users >	ID 🔶 Name 🔶	Date/Time From	Date/Time To	Demand	Pending	Confirmed	Rejected	Overview		
🖻 Headcount 🔉	22732936 event_in_future	Mar 9, 2022 9:00 AM	Mar 23, 2022 9:00 AM	160	0	0	1		•	2
Communications	22732937 event_apps_open	Mar 9, 2022 9:00 AM	Mar 23, 2022 9:00 AM	150	0	0	0		•	
🗅 Reports 💙	22732938 no_map_event	Mar 9, 2022 9:00 AM	Mar 23, 2022 9:00 AM	150	0	0	0			
🖓 Workflows 🗲	22732939 event_not_publish	Mar 9, 2022 9:00 AM	Mar 23, 2022 9:00 AM	150	0	0	0		•	•
③ Payroll >	22732940 bulk_update_test	Mar 9, 2022 6:00 AM (+08:00 AWST)	Mar 23, 2022 6:00 AM (+08:00 AWST)	150	0	0	0			•
Forms	22732941 Reg1	Dec 2, 2022 12:00 AM (+00:00 UTC)	Dec 16, 2022 12:00 AM (+00:00 UTC)	20	0	0	1		•	•
New Nav Experience	22732944 TV ebent	Feb 1, 2022 12:00 AM (+00:00 UTC)	Feb 28, 2022 12:00 AM (+00:00 UTC)	92	9	3	10			
ttps://sub.testing.rosterfy.com	admin/event/list					÷	-		-	-

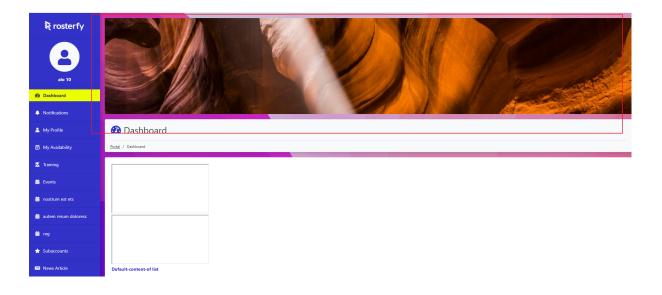
#### **Candidate Portal Banner and Background**

Admins now will be able to control, via settings, additional visual effects for staff/volunteers:

- Banner Image (i.e. see the rock image below, that is a banner on the dashboard)
- Background Image, that sits behind all pages

See below the section inside Settings > Organisation Settings > Branding

	R rosterfy	Admin / Settings / <u>Organizatio</u>	1.Settings	Search Q 🕢 🗘
	Forms	Land Bundesland/Kanton	v	Google Kurdeville Kanterlation 6 2022 Nutworksdefingungen Drag and drag the pin to the required location. Double click marker to remove. Click the map to re-add marker
	Organization Settings	Logo (color) 🕕	Choose an Image For best result upload your logo as a PNG file with transparent background, #12px wide and 250px high	Browse
	Subaccounts Admin Permissions	Logo (monochrome) 0	Choose an image for best results uptice your back or white logo as a PHG file with transperent background, 376px wide and Mps Hgh	Browse
•	Custom Fields	Background image 0	Choose an image For best results upload a JPG file, 1920ps wide and 927ps high	Browse
	Terminology Merge Tags	Portal Background image 🕚	View file For best results upbad a IPG file, 1920ps wide and 927ps high	× Remove
	Files	Portal Banner image	View file Recommended site 120bs wide by 30bs high	× Remove
•	Branding	Subaccount Banner image 🕚	Choose an image Recommended size 100ps wide by 500ps high	Browse
•	Portal Content	Favicon	Choose an image	Browse
•	Billing	Primary color *	#3232c8	Use default?
•	Integrations	Secondary color *	#ebff00	Use default?
	Webhook	Custom CSS		
_	Vivew way experience			



#### **Admin Can Cancel Expression Of Interest**

Admins now will be able to, if they have access to do so, Expressions Of Interest, and in particular cancel them from the Admin Site (in the Update User section as per screenshot below). This will save time impersonating and logging in as a User to do the same thing.

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🕑 Home		Updating a User				×						
🛱 Events	>		dated on this page. If you cannot update an attribute you may not have permissio resets and communication shortcuts.	n to do so. A number of helpful actions can be fou	nd in the 'Acti	ons' dropdown menu on the						
쑴 Users	~	3 More info	More info									
Users					rm:testing:2	20101:user:UWPSnqpEn1IRACVytc1VNuIC @						
Groups	Update User											
		New51 ☆☆☆☆☆				Last Updated: Jan 7, 2022 9:48 AM						
Invitations		📁 Default 🛛 🖸 Email no	t verified 🛛 Unsubscribed from marketing email 🔘 2FA not enabled			Actions *						
Training												
Rewards & recognition		Personal details	Events									
		Groups	Event 🔶 Post Event Feedback Completed	Expression of Interest Completed	\$ Tot	tal Scheduled Hours)						
Contracts		Availability	demo exp of interest 2022	Thu, Jan 6, 2022 2:48 PM	0	<b>0</b> •						
Duplicates		Events/Shifts	denio exp of interest 2022	Thu, Jan 6, 2022 2-46 PM	0	item #331						
Duplicates		Communications	Showing 1 to 1 of 1 results									
Background Check		Training				🖉 Update						
🖻 Headcount	>	Role offers	Shifts			<ul> <li>Cancel Expression of Interest</li> </ul>						
Es Headcount	·	Inventory	Actions - Select all 0 items selected			Send Communication						
Communications	>	Certificates				3 History						
C Reports	,	Background Check	Event Shift Shift Date/Time From 🔶 Shift Date/Time To 🔶 Stat	us 🔶 Check In Date/Time 🔶 Check Out Da	te/Time 🔶							
	·	Contracts	Th	ere are no records to show								
<b>℃</b> Workflows	>	Ratings		Add User To Shift								
S Payroll	>	Subaccounts										
B												

#### Forms Can Be Copied To Accounts/Subaccounts

Admins are now able to select Forms and copy them to Accounts or Subaccounts. This will save a lot of time in reproducing Forms across accounts manually. When copying, if the Attribute does not exist in the other account (i.e. the Attribute ID does not exist) the Attribute will be auto-generated.

R rosterfy	,	Admin	/ Forms / List		Search	٩	@ ¢	ł
Dashboard		Forr	ns					
🛱 Events	>							
얨 Users	>	Fo	rms				🕀 Crea	te
🖻 Headcount	>				S	arch	۹ ۲	4
Communications	>	ID \$	P Name ¢	Туре				
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S <sup>o</sup> Workflows	,	2	User Profile	User Profile		item	#1 Jpdate	
Payroll	, ,	13	user_interact	User Interaction			review	
	<i>´</i>	14	anonymous	Anonymous Form		di o	Сору	
Forms		15	anonymous-private	Anonymous Form				• •
Settings	>	16	Role Offer Accept	Role Offer User Interaction				• •
		17	Role Offer Reject	Role Offer User Interaction				• •
		18	Event User Interaction	Event User Interaction				• •

#### 18 January 2022

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🖹 rosterfy		Admin / Forms / <u>List</u>		Search Q 😨 🗘
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Headcount	>		Rosterfy > Rosterfy Subaccount Rosterfy > Rosterfy Subaccount > promoted subsubaccount	Search Q T D
Communications	>	ID 🔶 Name	Rosterfy > Rosterfy Subaccount > unpublished_subsubaccount	
Reports	>		Rosterly > Bosterly Subaccount > join_subsubaccount Rosterly > Rosterly Subaccount > join_subsubaccount > Rosterly Sub Sub Subaccount Rosterly > Rosterly Subaccount > api-setting	Ø.*
<b>℃</b> Workflows	>	2 User Profile	Rosterfy > Rosterfy Subaccount > demo_payroll Rosterfy > Rosterfy Subaccount > demo01	0 *
③ Payroll	,		User Interaction	• •
Forms	Í	14 anonymous		0 -
	>	15 anonymous-private		0 - E
• Jettings	í		Role Offer User Interaction	0 ·
				<b>0</b> -
		18 Event User Interaction	Event User Interaction	<b>0</b> *
				Ø.*
			User Interaction	<b>0</b> *
New Nav Experience	e	Showing 1 to 10 of 30 results		Per Page         10         Φ         <         1         2         3         >



#### Mandatory Fields Missed On Forms Highlighted

Users will now be able to see mandatory fields highlighted and focused on forms, if they try to submit the form with some of these fields empty or with invalid entries.

f Register with Facebook		<b>G</b> Re	gister with Google	
Email *				
ſ				()
Password *	Please f	ill in this field.		0
First Name *		Last Name *		
	()			()
Date of Birth *		Phone		
dd/mm/yyyy	0	<b>₩</b> ₩ +61 🗢		<ul> <li>✓</li> </ul>
Subscribe to marketing content?				

#### **Allocations Shift Start Date Calculations**

Recently 'Total Shift Hours per Day' was introduced as a calculation. To account for night shifts, we have now also introduced the calculation that hours of a shift are considered part of the calendar day they start on.

i.e. if a shift starts at 10pm on Saturday, ending 3am Sunday, they will contribute 5 hours to the Saturday hours count.

	R rosterfy		Admin / Users / Rewards & re	cognition / <u>Create Allocation</u>	Search	۹	0	¢	2
Ċ	Bashboard	1	Users						
Ċ	Events	>	Items Allocations Ve	ndor Certificates					
12	# Users	~	Create Allocation						
•	Users		Name *						
•	Groups		Type *	Select one				× v	
•	Invitations		Rules *	Total Shift Hours per Day   Value					
•	Training		Conditions	+ Add Condition					
•	Rewards & recognition		Conditions						
•	Contracts		Save						
•	Duplicates								
	Background Check								
e	9 Headcount	>							
D	3 Communications	>							
C	) Reports	> _							
	New Nav Experies	ce							
		-							

#### **Additional Payroll Status Added**

Admins will now be able to control Payruns with the additional status 'invoiced' which sits between 'locked' and 'completed'. This does not drive any functional difference between locked and completed, however will allow Admins to denote that a Payrun has been Invoiced if any Labour Hire or third party invoice is required.

😫 rosterfy		Admin / Events / Payroll / Pay	rruns / <u>Update Payrun</u>	Search	۹	?	<b>4</b>	8
🖆 Home		Events						
🛱 Events	~							
Events		Update Payrun hum Payrun		0	English (Unite	d States)	1 × V	
Event Templates	- 1					ľ	Actions <del>-</del>	
Shifts	- 1	General						
Shift User Status		Event	hum					
Shift Templates		Name *	hum Payrun					
<sup>884</sup> Users	>	Status *	Pending				^	
🖻 Headcount	>	Cycle Start *	Pending t Processed					
Communications	>	Cycle End *	Approved Locked					
C Reports	>	custom address attribute	Invoiced Completed					
<b>℃</b> Workflows	>	Lookup Address	Look up a location to pre-fill address fields				_	
S Payroll	>	Street Address Line 1						
Forms		Street Address Line 2						
New Nav Experie	nce	City/Town						

#### Import Shifts with Min DOB and Age

Admins will now be able to import shifts with Minimum Date Of Birth (DOB) and Age fields, so that they no longer need to manually update these fields.

Import: Mapping		Admin / Evante / Shifte / Liet								Search			0	<u>^ </u>
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estival Village	Sy	dney International Regatta Centre		Sydney		2749		AU		2002-06-22		25:5		
Process														Cancel
Shift User Status		O More info				1			-					
Shift Templates		Shifts Types												
略 Users 2	>	<sub>Reg1</sub> © Shifts											•	Create
E Headcount	>	Actions 👻 🗮 List 📰 Schedul	e Select all 0 Shifts selected										Q <b>T</b>	
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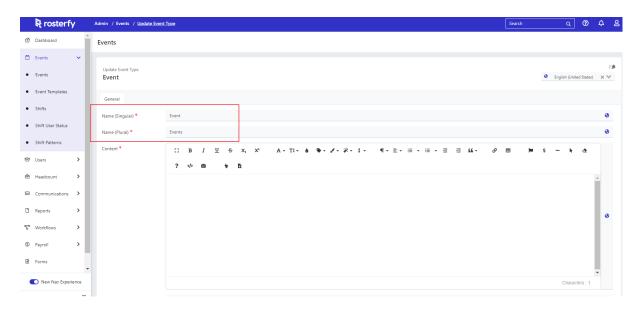
🗟 rosterfy	'	Admin / Events / Shifts / U	<u>pdate Shift</u>	l	Search Q	0	Ą į
🕑 Home		Shift title			- English (Shire	a otateoj	Actions -
🛱 Events	~	General	General Advanced	Statuses Check In Forms Visibility Custom Attributes			
Events			Shift Type	• Select one			×V
Event Templates	- 1		Timezone *	(GMT +00:00) UTC			××
Shifts			Choose a Training	0			¢
Shift User Status			Certificate	Select one		× Y	Preview
Shift Templates			Leader Demand *	0			
啔 Users	>		Min Demand *	0 1			
🖻 Headcount	>		Link Role offer	Start typing name of Role offer Venue or Job Title			
Communications	>		Minimum Age	25 Years     5 Months Cannot be used with minimum date of birth			÷ ×
C Reports	>		Minimum Date of Birth	22/06/2002			
🖓 Workflows	>	L		Cannot be used with minimum age			
S Payroll	>		Enable Waitlist	0			
Forms			_		Market Complete		
	ē		Save				
Doeterfy Id Na vi	ov ^						Show all

## **Events & Shifts**

#### All Event Data Will Override With Terms From The Event Type

Admins are now able to set Event Type specific Terms - which can be controlled via the Event Type setup.

This means that different event types can now be set up and the terms will vary - i.e. you may have an event type 'Interviews', where now you can define that the term 'Events' will be renamed 'Interviews' to help drive understanding and grouping across the platform.





#### Bulk Delete Shifts Available On User Profile View

Admins are now able to Bulk Delete Shifts (when shifts selected) on the User Profile View, as per screenshot below. This will make it much easier to delete shifts here as necessary, without needing to locate the Event/Shift in the Events section of the Admin site.

	🗣 rosterfy	Admin / Users / <u>Update User</u>		Search Q 🕜 🗘 😫
₫	Dashboard			
Ö	Events >	Update User		rmstesting:20101.susen:wakK6krgHG7lqCmYjcdGA02f 🏶 23120251 🏨   History 🏵
101	Users 🗸	alo10 ☆☆☆☆☆		Last Updated: Jan 10, 2022 10:59 AM
	Users 🗸	🏴 Default 🛛 🖸 Email no	t verified O Unsubscribed from marketing email O 2FA not enabled	ACUONS *
•	Users			
•	Groups	Personal details	Events	
	Invitations	Groups	Event $\diamond$ Post Event Feedback Completed $\diamond$ Expression of Interest Completed	Total Scheduled Hours)
•	invitations	Availability Events/Shifts	Multiple allocation	9 0 -
•	Training	Communications	exp offfff Tue, Jan 11, 2022 12:18 PM	0
•	Rewards &	Training	exp onini ide, Jan 11, 2022 12:10 PM	
	recognition	Role offers	Showing 1 to 2 of 2 results	Per Page 10 🗢
•	Contracts	Inventory	Shifts	O Add User To Shift
	Duplicates	Reward points		
		Certificates	Actions - Select none 2 items selected	Search Q T 2
	Background Check Headcount	Background Check	😰 Bulk Update R Shift Date/Time From 🔶 Shift Date/Time To 🔶 Status 🔶 Check In Date	e/Time 🕸 Check Out Date/Time 🕸 Created At 🔶 Updated
	neadcount /	Contracts	Bulk Delete 1 2 - dinner Jan 10, 2022 4:00 PM (-01:00 -01) Jan 10, 2022 9:00 PM (-01:00 -01) Confirmed • Check In	Jan 9, 2022 11:01 PM (-01:00 -01) Jan 9, 20
	Communications	Ratings	Multiple allocation shift 1 - lunch Jan 10, 2022 9:00 AM (-01:00 -01) Jan 10, 2022 1:00 PM (-01:00 -01) Confirmed  Check In	Jan 9, 2022 11:00 PM (-01:00 -01) Jan 9, 20
D	Reports >	Subaccounts		
	*		Showing 1 to 2 of 2 results	Per Page 10 🗢
	New Nav Experience			

## Headcount

#### **Missing Data Fields Added To Reports**

Some fields were missing for Admins to extract via reports, these are now available to run in the reports module on the Admin site, under the 'All Role Offers' report type:

- Functional Area code
- Job Type code
- Location code
- Venue code

#### User Type Shift Limits Are Now Enforced On Role Offers

Admins will now find that shift limits that are set up on User Types, will be enforced when that User Type is assigned to a Role Offer. This will ensure no conflicts occur (i.e. you have a user type X that has a min/max shift length - this user type cannot be linked to a role offer and shift that does not meet these requirements)

See below:

- Creating a User Type
- Creating a Role Offer
- Attaching this Role Offer to a Shift (with limits restrictions shown)

Users	Admin / Users / Update Type				
Dashboard	Update Type	15 🏨			
List	new				
Groups	General Branding Headcount Events				
Forms	Maximum amount of hours Users can work in a week *				
Invitations	Gap between Shifts in 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				
Contracts	Minimum shift length * 0 Weeks	÷			
Training	Minimum shirt length V veeks V Jays V Z Hours V Minutes	•			
Rewards & recognition	Maximum shift length * 0 Weeks 0 Days 0 4 Hours 0 Minutes	٥			
Duplicates					
Background Check	Save				

### 18 January 2022

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Headcount	Admin / Headcount / Role offers / Update Role offer				
Functional Areas	Update Role offer Stow		28 🐞 Cinglish (United States) 🗙 😒 Actions –		
Role offers 🗸 🗸	台 WHS up	Default     O Default	🚢 1/10		
List	General Demand Cri	eria Settings Custom Attributes			
Users	Functional Area *	WHS up	× ¥		
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	Description	□ B I U ⊕ X, X <sup>1</sup> A TI ♦ ♥ X X T • ¶ • E • E • E • E • E • E	66 - <i>O</i> =		
		₩ \$ — k & ?          			
		5			
New Nav Experience			0		
ē					

List	required for a Shift is set by the 'Max Demand'. This is the number of Users that can apply, or be assigned to this Shift with a status of pending, confirmed or attended	
Event Templates	Create Shift	
Shift User Status	▲ General Advanced Statuses Check In Forms Visibility Custom Attributes	
Shift List	Name * O RO related	8
Shift Patterns	Users Required * 0 10	
Payroll >	Start Date/Time * 🗅 16/03/2022 09:00 am	O
	End Date/Time 16/03/2022 09:00 pm	O
	Maximum length is 4 hours           Description           ● []]           B         I         I         S         X <sub>1</sub> X <sup>1</sup> A - TI - A         P - J - P - I - T         T - E - E - E - E - E - E - E - E - E -	∎ 3 of •
		± 001
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New Nav Experience		8