

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

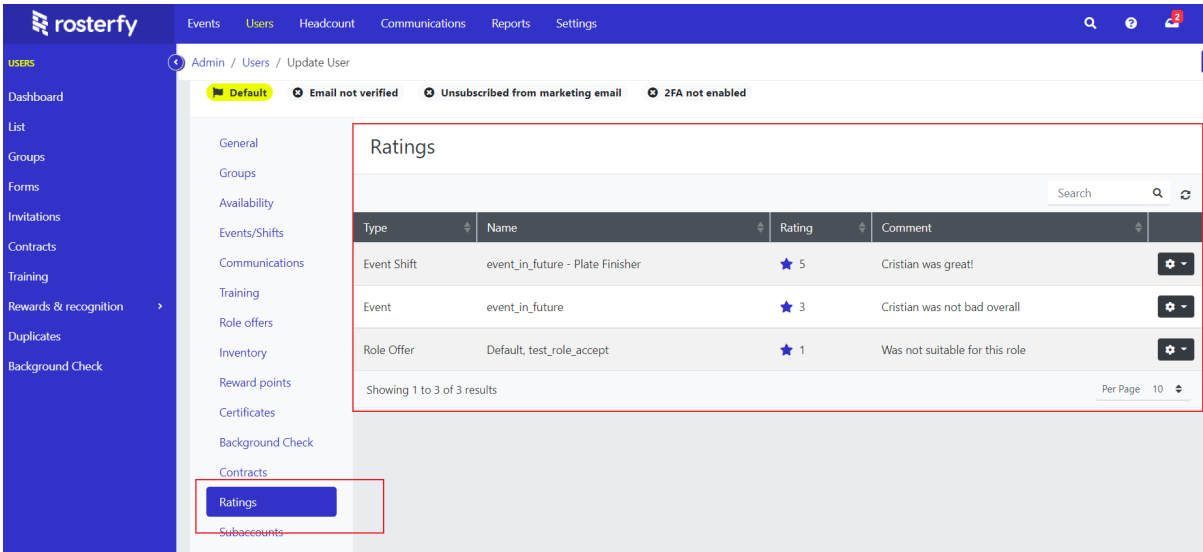
User Ratings

User Ratings is a new feature that allows Admins to track and average out ratings for a volunteer/staff member, over potentially longer periods. This can be turned on, to track a 5-star User Rating for three areas, where a rating (out of 5) is given and also a comment, if desired;

- Events
- Shifts (within an Event)
- and Roles

This can also be extracted within a Report if needed. Note - ratings for the same Event, Shift or Role, cannot be given more than one time.

Video: <https://www.loom.com/share/ab406fa104e64985a484e69b800853bc>



The screenshot shows the Rosterfy Admin interface. The top navigation bar includes 'Events', 'Users', 'Headcount', 'Communications', 'Reports', and 'Settings'. The left sidebar lists various user management options: 'Dashboard', 'List', 'Groups', 'Forms', 'Invitations', 'Contracts', 'Training', 'Rewards & recognition', 'Duplicates', and 'Background Check'. The main content area is titled 'Admin / Users / Update User' and features a 'Ratings' section. This section contains a table with columns for 'Type', 'Name', 'Rating', and 'Comment'. The table lists three ratings: an 'Event Shift' for 'event_in_future - Plate Finisher' with a 5-star rating and comment 'Cristian was great!'; an 'Event' for 'event_in_future' with a 3-star rating and comment 'Cristian was not bad overall'; and a 'Role Offer' for 'Default, test_role_accept' with a 1-star rating and comment 'Was not suitable for this role'. A search bar and a 'Per Page' dropdown are also visible in the Ratings section.

Type	Name	Rating	Comment
Event Shift	event_in_future - Plate Finisher	★ 5	Cristian was great!
Event	event_in_future	★ 3	Cristian was not bad overall
Role Offer	Default, test_role_accept	★ 1	Was not suitable for this role

rosterfy Events Users Headcount Communications Reports Settings

Admin / Events / Shifts / Shift Users

Shift User List

This is the list of all Users that are connected to this Shift. Each User has their own (status) for this Shift which you can see below. From this page you can

- Add a new User to this Shift
- Update a User currently on this Shift
- Send a communication to all (or a filtered segment) of Users on this Shift
- Export Users to a group

event_in_future - Plate Finisher

Users

Jan 19, 2022 8:00 PM to Jan 20, 2022 4:00 AM 10

Actions Select all 0 Users selected

Picture	User Name	Status	Check in Date/Time	Check out Date/Time
	Cristian Auer	Confirmed		

Showing 1 to 1 of 1 results Per Page 10

Buttons: Add, View Profile, Add Rating, Delete

rosterfy Events Users Headcount Communications Reports Settings

Admin / Events / Shifts / Shift Users

Shift User List

This is the list of all Users that are connect

- Add a new User to this Shift
- Update a User currently on this Shift
- Send a communication to all (or a fi
- Export Users to a group

event_in_future - Plate Finisher

Users

Jan 19, 2022 8:00 PM to Jan 20, 2022 4:00 AM 10

Actions Select all 0 Users selected

Picture	User Name	Status	Check in Date/Time	Check out Date/Time
	Cristian Auer	Confirmed		

Showing 1 to 1 of 1 results Per Page 10

Modal: Cristian Auer

Rating: ★★★★★

Comment: Cristian was great!

Buttons: Save, Cancel

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rosterfy Events Users Headcount Communications Reports Settings

Admin / Users / Update User

Update User

rrm:testing20101userVdZGvd8PGHXswRkYmY9UhfD

5 | History

Last Updated: Oct 11, 2021 8:24 PM

Buttons: Actions


Default Email not verified Unsubscribed from marketing email 2FA not enabled

Ratings

Type	Name	Rating	Comment
Event Shift	event_in_future - Plate Finisher	★ 5	Cristian was great!
Event	event_in_future	★ 3	Cristian was not bad overall
Role Offer	Default, test_role_accept	★ 1	Was not suitable for this role

Showing 1 to 3 of 3 results Per Page 10

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 rosterfy

EventsUsersHeadcountCommunicationsReportsSettings

Admin / Reports / Update Report

REPORTS

ListSystem Log

Update Report

TypeColumnsFiltersSortingWhen?

Available Columns

UserAdd Columns

Chosen Columns

User - Full NameUser - Rating

PreviousNext

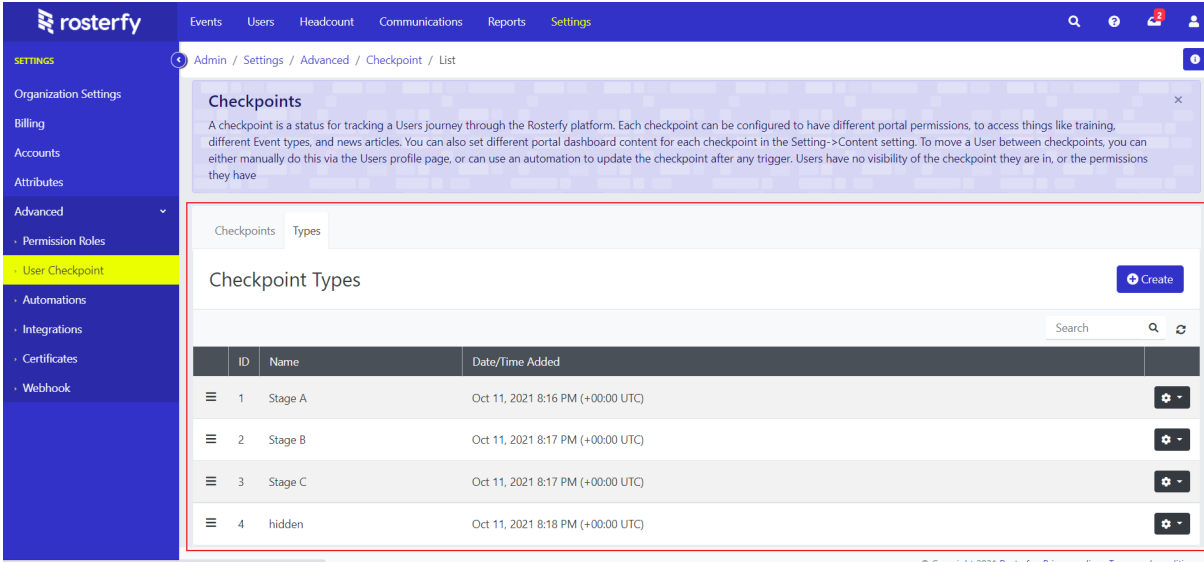
Checkpoint Type and Visualisation

Admins are now able to control a new sub-feature of 'Checkpoint type' - this will automatically be shown for Candidates (Volunteers/Staff) in their Portal Dashboard, where their Journey with your Organisation can be better visualised.

Each Checkpoint may (but not mandatory) be assigned a Checkpoint Type for this purpose, as per screenshots below. The Checkpoint Types can be public or hidden (not public). As long as a Candidate is assigned to a Public Checkpoint Type Checkpoint, the 'My Journey' section within the Candidate Portal Dashboard.

The Journey Order may be controlled by the vertical order of Checkpoint Types. A different display name to actual name may also be used, if desired.

Video: <https://www.loom.com/share/f21c5c03549f45cc8046b796a416ed9b>



The screenshot shows the Rosterfy Admin interface. The left sidebar contains navigation links: SETTINGS, Organization Settings, Billing, Accounts, Attributes, Advanced (expanded), Permission Roles, User Checkpoint (highlighted), Automations, Integrations, Certificates, and Webhook. The main content area is titled 'Checkpoints' and includes a sub-section 'Checkpoint Types'. A table lists four checkpoint types: Stage A, Stage B, Stage C, and hidden. Each row includes an ID, Name, Date/Time Added, and a settings icon.

ID	Name	Date/Time Added
1	Stage A	Oct 11, 2021 8:16 PM (+00:00 UTC)
2	Stage B	Oct 11, 2021 8:17 PM (+00:00 UTC)
3	Stage C	Oct 11, 2021 8:17 PM (+00:00 UTC)
4	hidden	Oct 11, 2021 8:18 PM (+00:00 UTC)

rosterfy Events Users Headcount Communications Reports Settings

Admin / Settings / Advanced / Checkpoint / Create Type

Create Type

English (United States)

General

Name *

Name (Portal) *

Is Public ☐

Sort Order * 0

Save

Save & Create Another

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rosterfy Events Users Headcount Communications Reports Settings

Admin / Settings / Advanced / Checkpoint / Update Checkpoint

Update Checkpoint

English (United States)

Default

General Permissions Actions

Name * Default

Portal Label * default

Type Stage A

Sort Order * 0

Save

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Dashboard

Portal / Dashboard

My Journey

1 Stage A → 2 Stage B → 3 Stage CCC

Role offers

test_role_accept Confirmed

My Training

Electronics Engineer (approx 14mins) Start

Upcoming Shifts

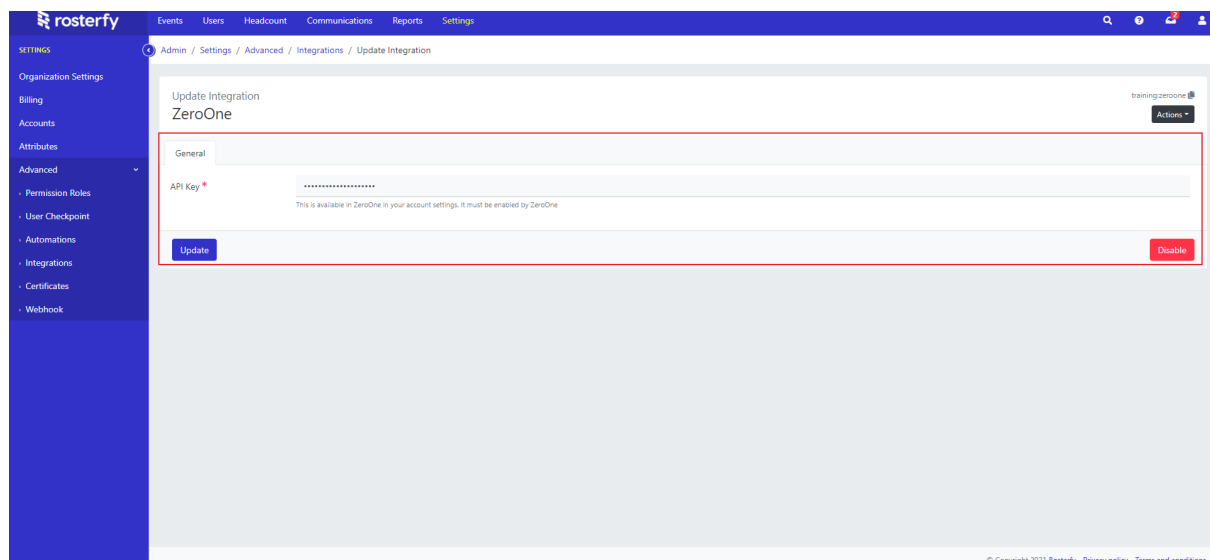
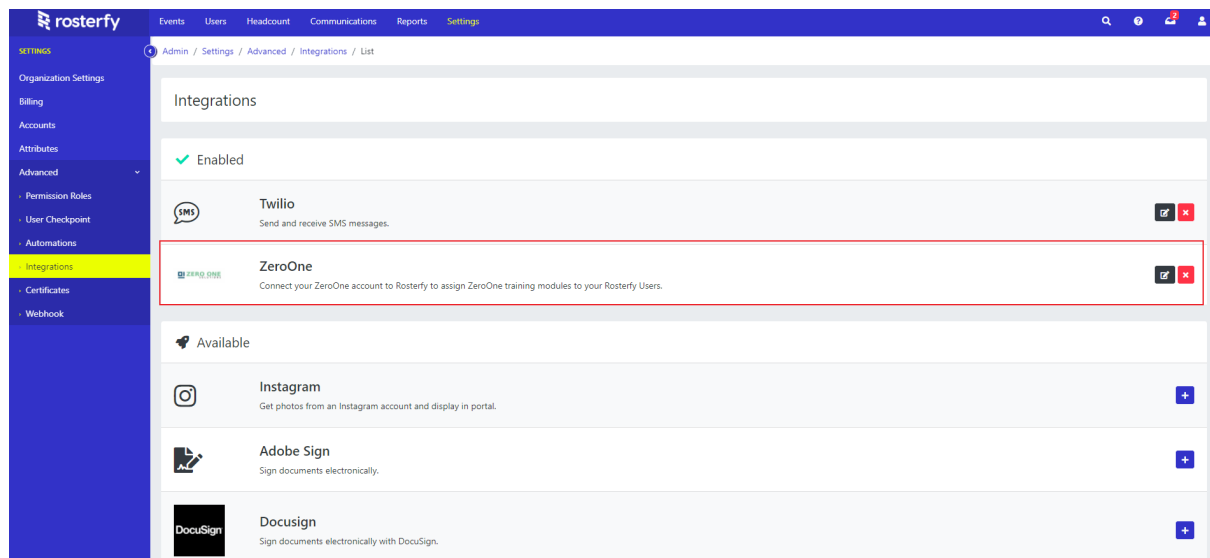
Accessibility Improvements

A number of smaller accessibility updates have been made across the platform, which will help improve accessibility (i.e. for visually impaired, those needing reading aides, etc.).

Integrations

New E Learning Integration Available: ZeroOne

Admins will be able to set up an Integration link with ZeroOne. This can be found in Settings > Advanced > Integrations, along with all of our other integrations. This setup will enable the integration, please speak to your CS manager for additional support however if you would like to set up this integration within your Rosterfy account.



New Accreditation Integration Available: Wiz Team Accreditation

Admins will be able to set up an Integration link with Wiz Team Accreditation. This can be found in Settings > Advanced > Integrations, along with all of our other integrations. This

19 October 2021



setup will enable the integration, please speak to your CS manager for additional support however if you would like to set up this integration within your Rosterfy account.

The screenshot shows the Rosterfy web application interface. The top navigation bar includes 'Events', 'Users', 'Headcount', 'Communications', 'Reports', and 'Settings'. The left sidebar shows the 'SETTINGS' menu with options like 'Organization Settings', 'Billing', 'Accounts', 'Attributes', 'Advanced', 'Permission Roles', 'User Checkpoint', 'Automations', 'Integrations' (highlighted), 'Certificates', and 'Webhook'. The main content area displays a list of integrations: 'Reference Check', 'Parental Consent', 'Wiz Team Accreditation' (highlighted with a red box), 'Zoom', and 'Teams'. Each integration has a description and a '+' button to add it.

The screenshot shows the 'Update Integration' form for 'Wiz Team Accreditation' in the Rosterfy web application. The top navigation bar and left sidebar are the same as in the previous screenshot. The main content area displays the 'Update Integration' form with the following fields: 'Username' (with a placeholder 'Your username to login to the Wiz Team system'), 'Password' (with a placeholder 'Your password to login to the Wiz Team system'), and 'Barcode Attribute' (with a dropdown arrow). An 'Enable' button is located at the bottom of the form. The form is highlighted with a red box.

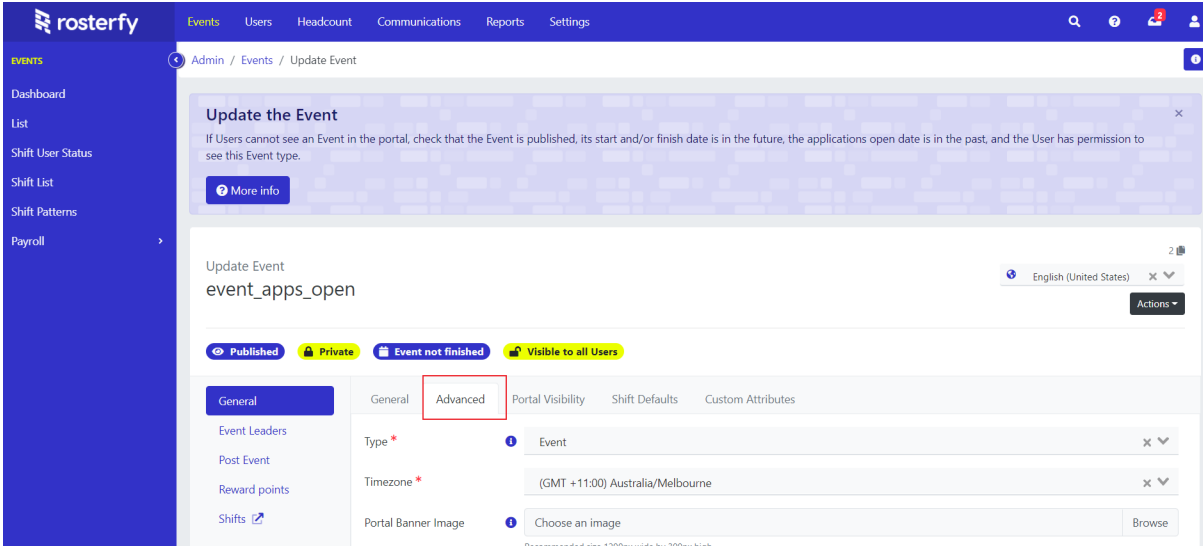
Events & Shifts

Min Shifts of Shift Type, for Event Applications

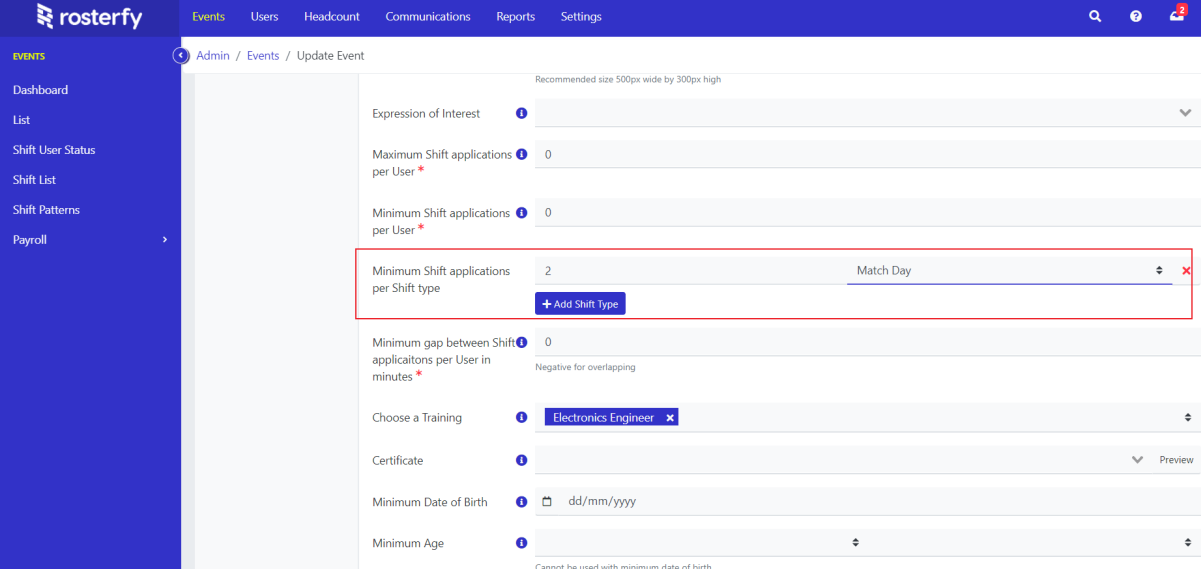
Admins are now able to set up minimum numbers of Shifts, of a Shift Type, to be applied for in a Shift Application action by Volunteers/Staff. This is under Events > Update Event > Advanced.

Admins will be able to set a restriction, so that when Volunteers/Staff try to apply for Shifts within the Event, at least x minimum number of Shifts of a particular Shift type, must be applied for. i.e., Volunteers/Staff must apply for at least 3 Marshalling Shifts minimum for this event, or they will be blocked (if they try to apply for less than 3), if this is what is set up.

Video: <https://www.loom.com/share/5c2043ecd16146c38f2f6b6f0814b028>



The screenshot shows the Rosterfy web interface for updating an event. The top navigation bar includes 'Events', 'Users', 'Headcount', 'Communications', 'Reports', and 'Settings'. The left sidebar lists 'EVENTS', 'Dashboard', 'List', 'Shift User Status', 'Shift List', 'Shift Patterns', and 'Payroll'. The main content area is titled 'Update the Event' and includes a 'More info' button. Below this, there's a section for 'event_apps_open' with tabs for 'General', 'Advanced', 'Portal Visibility', 'Shift Defaults', and 'Custom Attributes'. The 'Advanced' tab is selected and highlighted with a red box. It contains fields for 'Type' (set to 'Event'), 'Timezone' (set to '(GMT +11:00) Australia/Melbourne'), and 'Portal Banner Image' (with a 'Choose an image' button and a 'Browse' button). A note at the bottom indicates a recommended size of 1200px wide by 300px high.



Recommended size 500px wide by 300px high

Expression of Interest

Maximum Shift applications per User 0

Minimum Shift applications per User 0

Minimum Shift applications per Shift type 2 Match Day

+ Add Shift Type

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

Choose a Training Electronics Engineer

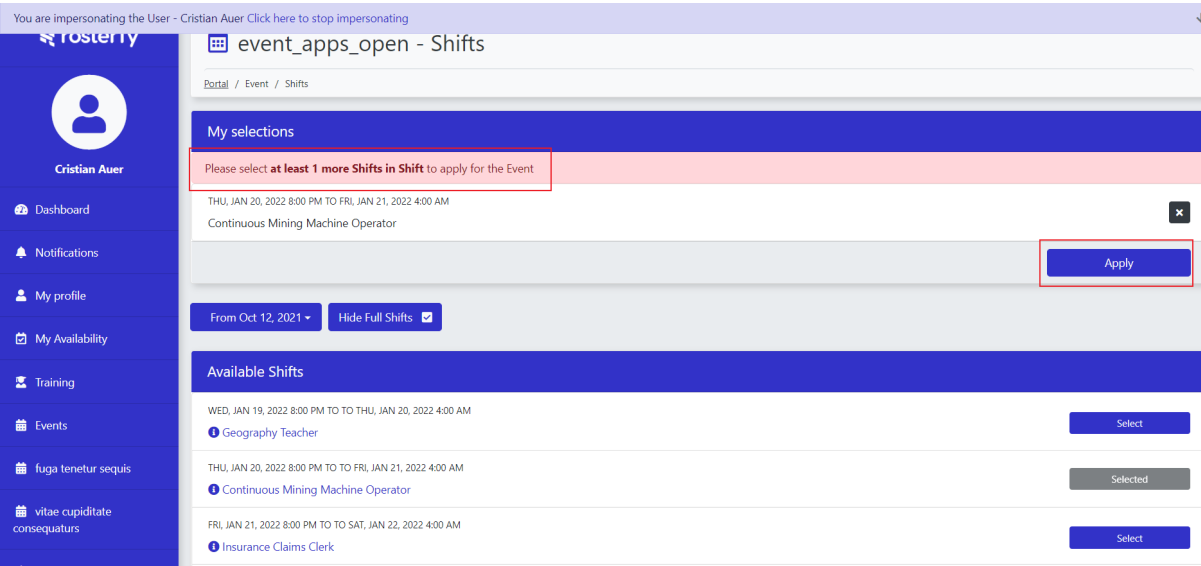
Certificate Preview

Minimum Date of Birth dd/mm/yyyy

Minimum Age

Cannot be used with minimum date of birth

Candidate Portal view, showing the minimum not being met when attempting to click 'Apply':



You are impersonating the User - Cristian Auer Click here to stop impersonating

event_apps_open - Shifts

Portal / Event / Shifts

My selections

Please select at least 1 more Shifts in Shift to apply for the Event

THU, JAN 20, 2022 8:00 PM TO FRI, JAN 21, 2022 4:00 AM

Continuous Mining Machine Operator

Apply

From Oct 12, 2021 Hide Full Shifts

Available Shifts

Date and Time	Shift Type	Action
WED, JAN 19, 2022 8:00 PM TO THU, JAN 20, 2022 4:00 AM	Geography Teacher	Select
THU, JAN 20, 2022 8:00 PM TO FRI, JAN 21, 2022 4:00 AM	Continuous Mining Machine Operator	Selected
FRI, JAN 21, 2022 8:00 PM TO SAT, JAN 22, 2022 4:00 AM	Insurance Claims Clerk	Select

Headcount

Pre Assignments

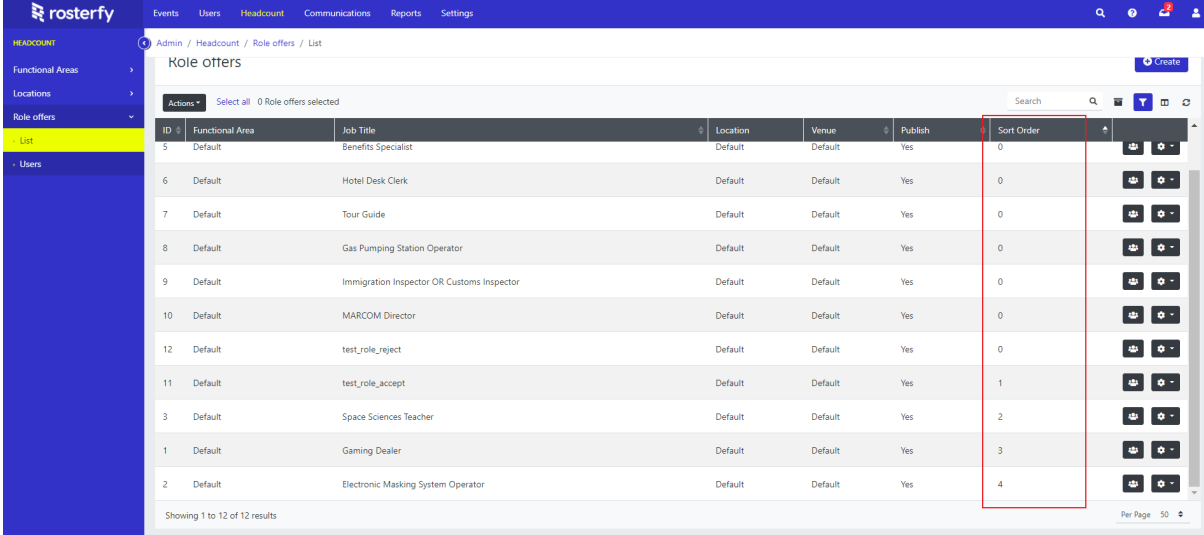
A number of updates have been included in new Preassignment functionality, within our Headcount Module. As per the screenshots below, the existing Sort Order will determine the Preassignment prioritisation.

Within each Role Offer there is now a 'Criteria' tab, where different rules can be set, either for the Role Offer as a whole or a Gold, Silver or Bronze ranking (you may want to, for example, use User Ratings as a rule to separate users).

For more assistance in implementing this new functionality, please contact your CS manager.

Video:

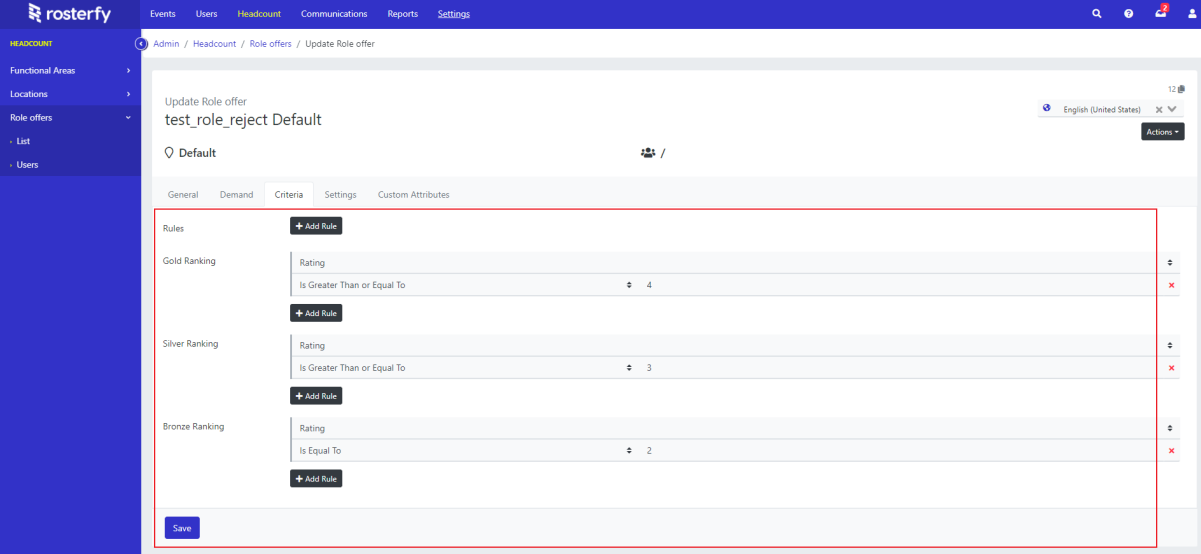
<https://drive.google.com/file/d/1s11r7Tj8wHb1v0kSZr8FZAPQkRjiBzWX/view?usp=sharing>



ID	Functional Area	Job Title	Location	Venue	Publish	Sort Order	
5	Default	Benefits Specialist	Default	Default	Yes	0	
6	Default	Hotel Desk Clerk	Default	Default	Yes	0	
7	Default	Tour Guide	Default	Default	Yes	0	
8	Default	Gas Pumping Station Operator	Default	Default	Yes	0	
9	Default	Immigration Inspector OR Customs Inspector	Default	Default	Yes	0	
10	Default	MARCOM Director	Default	Default	Yes	0	
12	Default	test_role_reject	Default	Default	Yes	0	
11	Default	test_role_accept	Default	Default	Yes	1	
3	Default	Space Sciences Teacher	Default	Default	Yes	2	
1	Default	Gaming Dealer	Default	Default	Yes	3	
2	Default	Electronic Masking System Operator	Default	Default	Yes	4	

Showing 1 to 12 of 12 results

Per Page 50



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Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / Update Role offer

Update Role offer
test_role_reject Default

English (United States)

Actions

Default

General Demand Criteria Settings Custom Attributes

Rules

+ Add Rule

Gold Ranking

Rating

Is Greater Than or Equal To 4

+ Add Rule

Silver Ranking

Rating

Is Greater Than or Equal To 3

+ Add Rule

Bronze Ranking

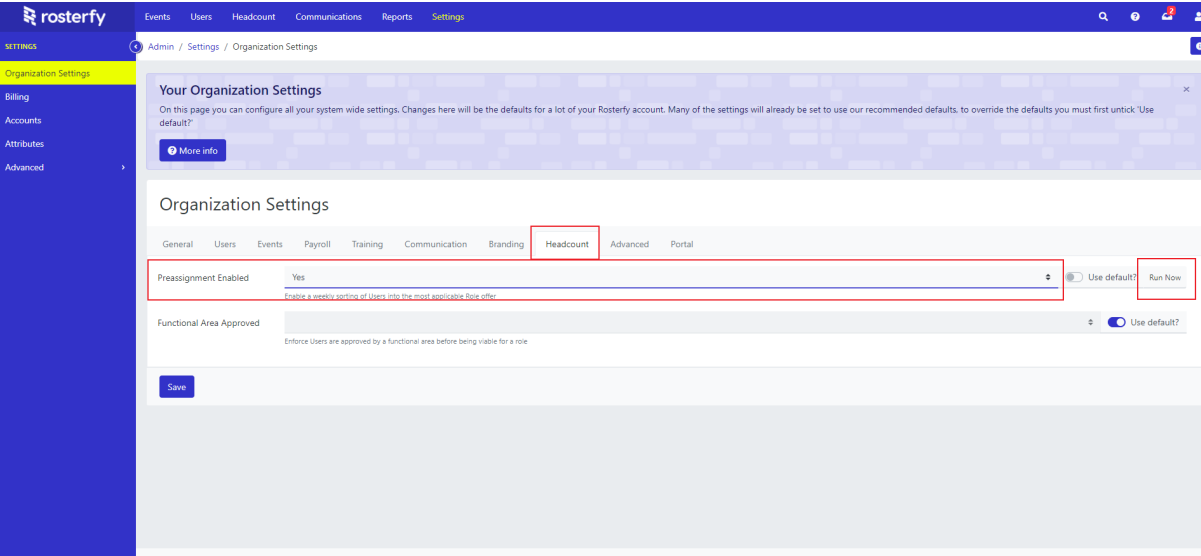
Rating

Is Equal To 2

+ Add Rule

Save

Within the Headcount section of your account Settings, you can then turn Preassignments on and select 'Run Now' which will run the Preassignments. This will process in the background, and you can see the final result below; all Users for Role below are Preassigned now, where 1, 2 and 3 stars relates to Bronze, Silver and Gold respectively. Admins are then able to go through and easily, from the Preassignment list, Assign or Not Approve users, based on available info.



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Events Users **Headcount** Communications Reports Settings

Admin / Settings / Organization Settings

Organization Settings

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 Payroll Training Communication Branding **Headcount** Advanced Portal

Preassignment Enabled Yes ☐ Use default? **Run Now**

Functional Area Approved ☐ Use default?

Save

functional Areas >
Locations >
Role offers >
List
Users!

Edit Role offer [🔗](#)
Professional Photographer Users!

[🔗 Manually Add A User! To Role offer](#) [🔗 Add From Viable Users!](#)

Transport **Melbourne** **Social and Human Service Assistant** **0/10**

Actions Select all 0 Users! selected Search

Name	Email	Status	Date/Time Added	User! Rating	Ranking	
Lura McClure	success+181@simulator.amazonses.com	Pre-assigned	2021-10-09 15:56:54	★ 1.00	🔒	👍 👎 👤 ⚙️
Scottie Smitham	success+186@simulator.amazonses.com	Pre-assigned	2021-10-09 15:56:57	★ 5.00	★★★★	👍 👎 👤 ⚙️
Quinn Lind	success+18@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:34	★ 4.00	★★★	👍 👎 👤 ⚙️
Hosea Block	success+180@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:37	★ 3.00	★★	👍 👎 👤 ⚙️
Milford Altenwerth	success+182@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:39	★ 4.00	★★	👍 👎 👤 ⚙️
Brook Price	success+183@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:41	★ 3.00	★★	👍 👎 👤 ⚙️
Brycen Leuschke	success+189@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:42	★ 3.00	★★	👍 👎 👤 ⚙️
Laurianne Reichert	success+184@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:44	★ 2.00	★	👍 👎 👤 ⚙️
Oleta Altenwerth	success+188@simulator.amazonses.com	Pre-assigned	2021-10-09 15:57:46	★ 2.00	★	👍 👎 👤 ⚙️

Showing 1 to 9 of 9 results Per Page 10

Role Offer User Listing

A small update, Admins are now able to see all Role Offer Users in one view, across all listings. This will enable an ease of viewing all Users in one view and also actions such as sending Communications, or exporting to Excel/CSV.

rosterfy Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / List

Users

Actions Select all 0 Users selected Search

Email	Job Title	Functional Area	Location	Status	
testing+portal20101@rosterfy.com	test_role_accept	Default	Default	Pending	⚙️
testing+portal20101@rosterfy.com	test_role_reject	Default	Default	Pending	⚙️
rate1@simulator.com	Electronic Masking System Operator	Default	Default	Completed	⚙️
rate2@simulator.com	Electronic Masking System Operator	Default	Default	Completed	⚙️
rate3@simulator.com	Electronic Masking System Operator	Default	Default	Completed	⚙️
success+11@simulator.amazonses.com	PICK	WHS	Mel5	Pending	⚙️
success+12@simulator.amazonses.com	PICK	WHS	Mel5	Pending	⚙️
success+13@simulator.amazonses.com	PACK	WHS	Mel5	Pending	⚙️

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Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / List

HEADCOUNT

Functional Areas

Locations

Role offers

List

Users

Actions Select all 0 Users selected

Send Communication to All listed Users

Export to Excel

Export to CSV

		Functional Area	Location	Status	
test_role_accept		Default	Default	Pending	
test_role_reject		Default	Default	Pending	
rate1@simulator.com	Electronic Masking System Operator	Default	Default	Completed	
rate2@simulator.com	Electronic Masking System Operator	Default	Default	Completed	
rate3@simulator.com	Electronic Masking System Operator	Default	Default	Completed	
success+11@simulator.amazonses.com	PICK	WHS	Mel5	Pending	
success+12@simulator.amazonses.com	PICK	WHS	Mel5	Pending	
success+13@simulator.amazonses.com	PACK	WHS	Mel5	Pending	

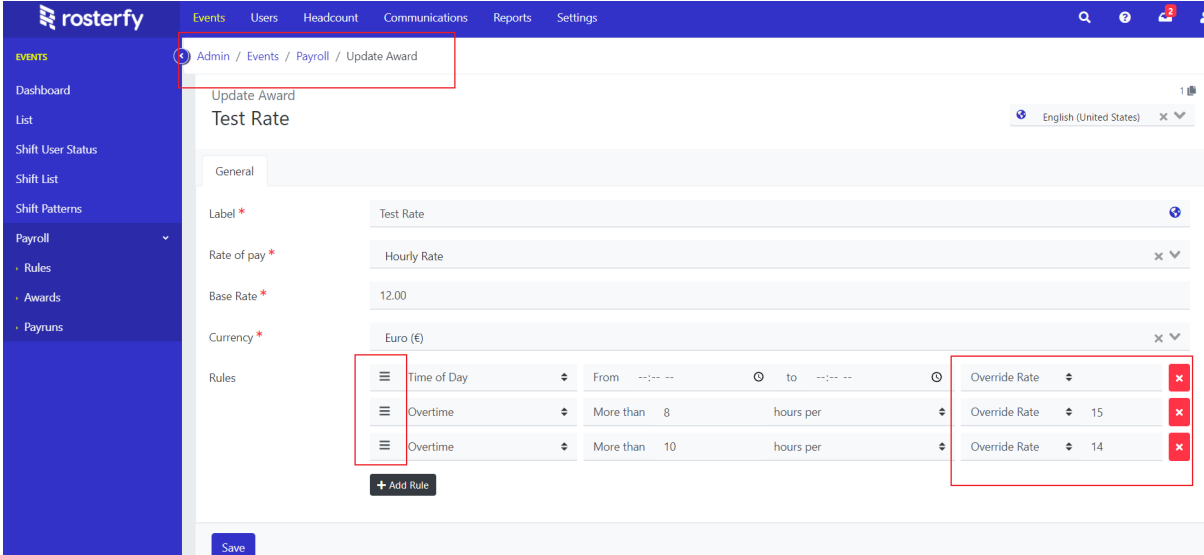
Payroll

Prioritisation of Payroll Rules

Admins are now able to prioritise the order of Payroll Award Rules. This is a small but very significant update, as previously the highest rate (in payment value) was always taken. Now, noting that there are situations where more hours may result in not necessarily higher pay rates, we have allowed for Payroll Rules to be drag and dropped into different orders, the highest on the list being the highest priority, descending downwards vertically.

This must be activated on your Account Settings, so please speak to your CS Manager if you'd like to turn this feature on.

Video: <https://www.loom.com/share/c321e837f05b445ab0691e03ea77d659>

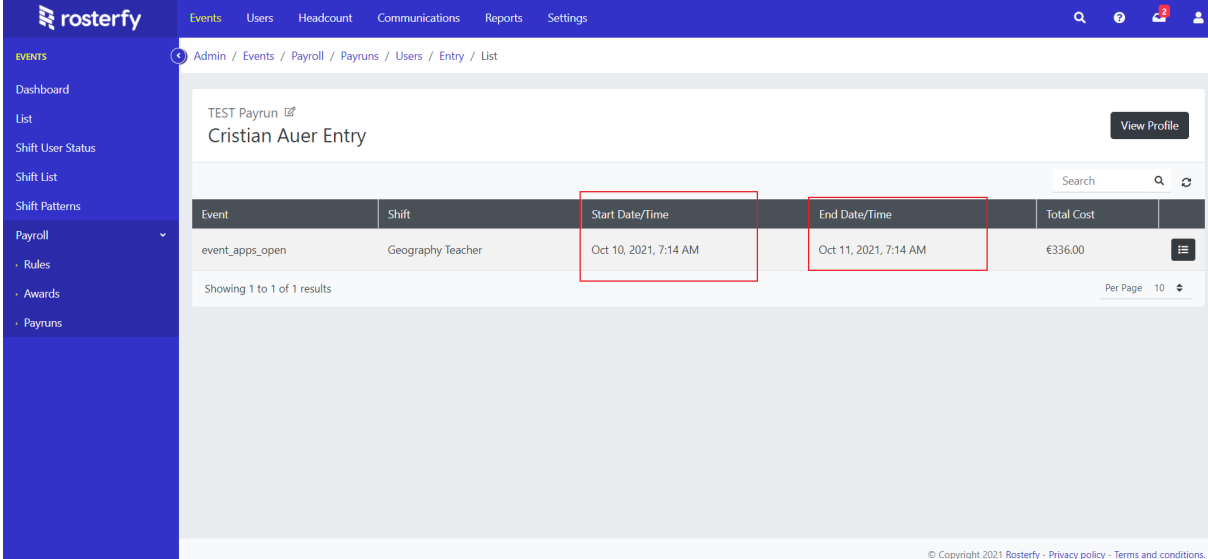


The screenshot shows the 'Update Award' page in the Rosterfy admin interface. The breadcrumb trail is 'Admin / Events / Payroll / Update Award'. The page title is 'Update Award' with a sub-header 'Test Rate'. The 'General' tab is active, showing fields for 'Label' (Test Rate), 'Rate of pay' (Hourly Rate), 'Base Rate' (12.00), and 'Currency' (Euro (€)). Below these is a table of 'Rules' with three entries, each with a menu icon, a description, and an 'Override Rate' field. The first rule is 'Time of Day' with no override rate. The second and third rules are 'Overtime' for 'More than 8' and 'More than 10' hours per week, with override rates of 15 and 14 respectively. A '+ Add Rule' button is at the bottom of the table. A 'Save' button is at the bottom of the page. Red boxes highlight the breadcrumb trail, the menu icons in the rules table, and the override rate fields.

Menu	Description	Override Rate
Time of Day		
Overtime	More than 8 hours per	15
Overtime	More than 10 hours per	14

Payroll Report Additional Fields: Date and Time

A small update, the Payroll Payrun reports will now show the date and time a Candidate worked on a shift, based on the timezone of the locale and Event/Candidate's timezone.



The screenshot shows the Rosterfy web application interface. The top navigation bar includes links for Events, Users, Headcount, Communications, Reports, and Settings. The left sidebar lists various modules under the 'EVENTS' category, including Dashboard, List, Shift User Status, Shift List, Shift Patterns, Payroll (selected), Rules, Awards, and Payruns. The main content area displays a 'TEST Payrun' for 'Cristian Auer Entry'. Below this, a table lists payroll entries. The first entry is for 'event_apps_open' by 'Geography Teacher', with a 'Total Cost' of €336.00. The 'Start Date/Time' and 'End Date/Time' columns are highlighted with red boxes, showing 'Oct 10, 2021, 7:14 AM' and 'Oct 11, 2021, 7:14 AM' respectively. The interface also includes a search bar, a 'View Profile' button, and pagination controls.

Event	Shift	Start Date/Time	End Date/Time	Total Cost
event_apps_open	Geography Teacher	Oct 10, 2021, 7:14 AM	Oct 11, 2021, 7:14 AM	€336.00

Showing 1 to 1 of 1 results

Per Page 10

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