19 October 2021

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

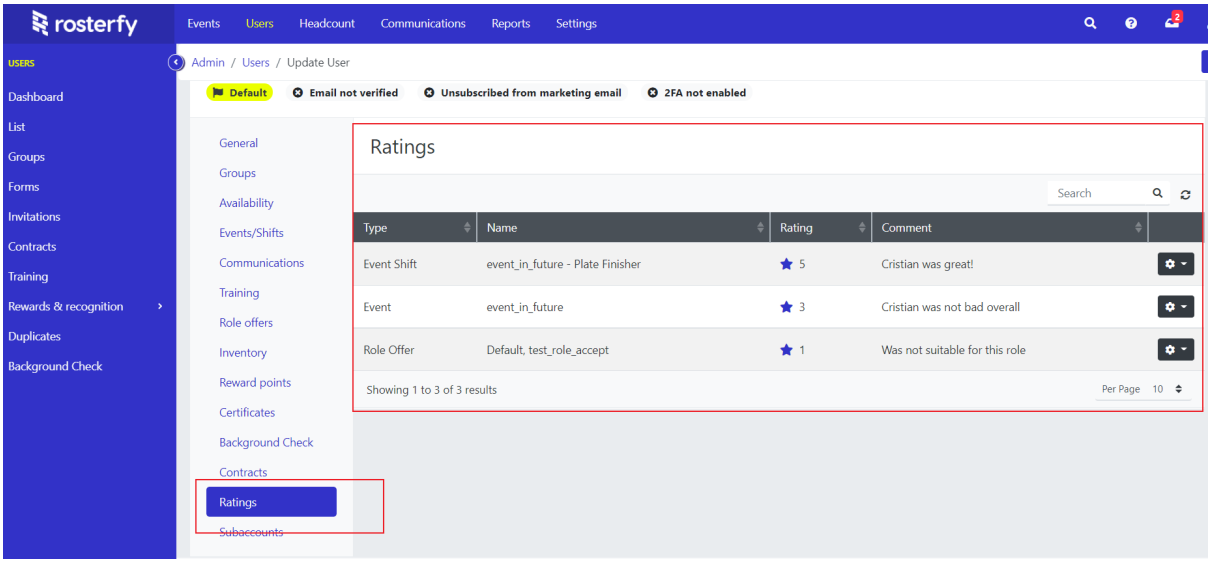
User Ratings

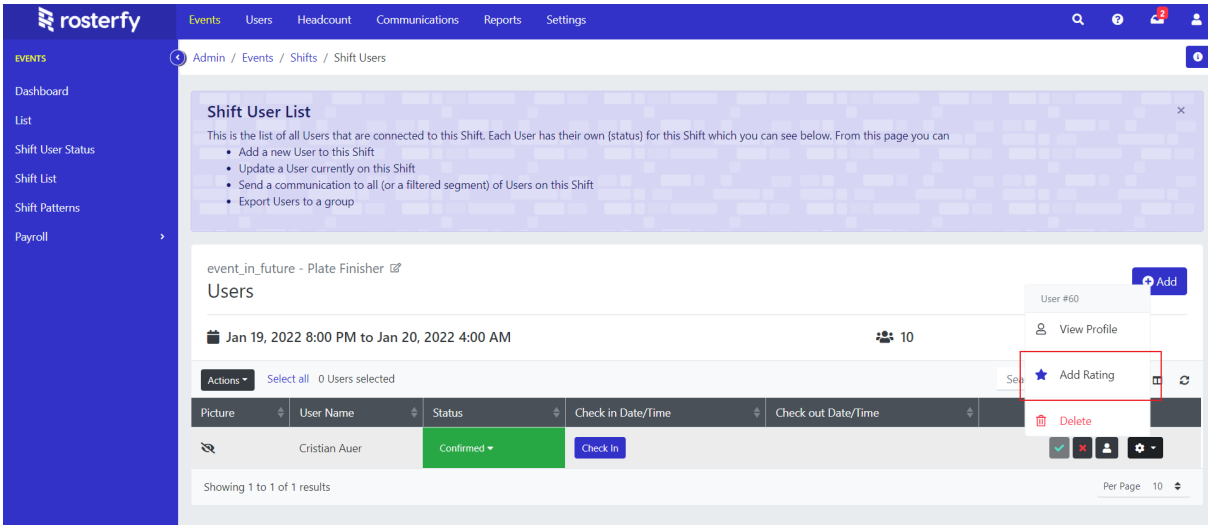
User Ratings is a new feature that allows Admins to track and average out ratings for a volunteer/staff member, over potentially longer periods. This can be turned on, to track a 5-star User Rating for three areas, where a rating (out of 5) is given and also a comment, if desired;

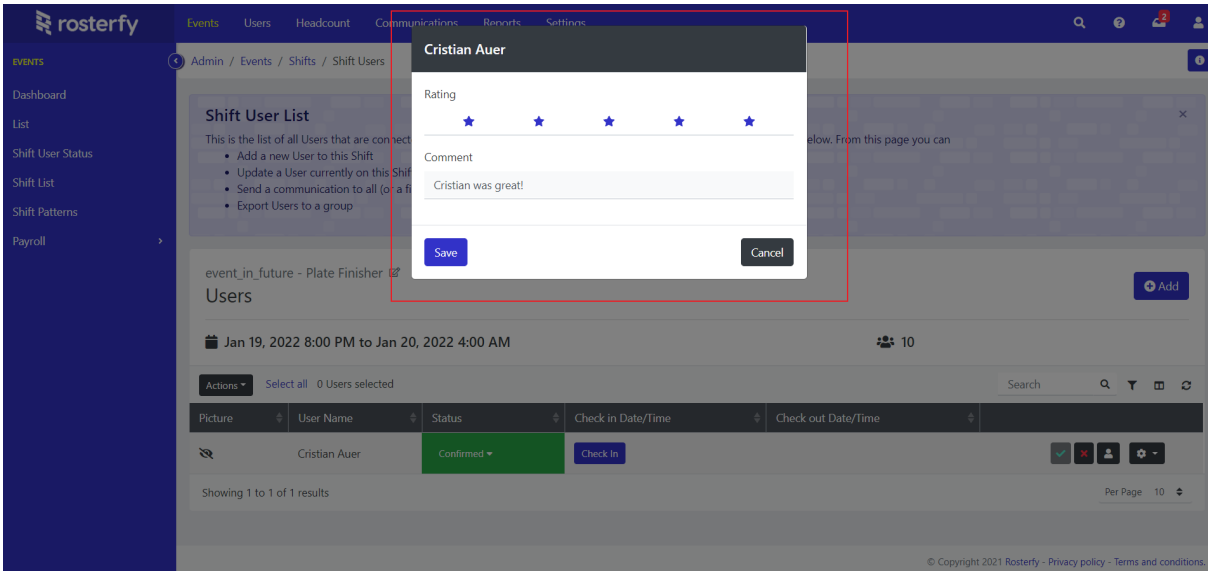
- Events
- Shifts (within an Event)
- and Roles

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




rosterfy
Events
Users
Headcount
Communications
Reports
Settings
EVENTS
Dashboard
List
Shift User Status
Shift List
Shift Patterns
Payroll
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
Add
Jan 19, 2022 8:00 PM to Jan 20, 2022 4:00 AM
10
User #60
View Profile
Add Rating
Delete
Actions
Select all
0 Users selected
Picture
User Name
Status
Check in Date/Time
Check out Date/Time
Cristian Auer
Confirmed
Check In
Showing 1 to 1 of 1 results
Per Page
10


rosterfy
Events
Users
Headcount
Communications
Reports
Settings
Cristian Auer
Rating
Comment
Cristian was great!
Save
Cancel
Admin / Events / Shifts / Shift Users
Shift User List
event_in_future - Plate Finisher
Users
Add
Jan 19, 2022 8:00 PM to Jan 20, 2022 4:00 AM
10
Actions
Select all
0 Users selected
Search
Picture
User Name
Status
Check in Date/Time
Check out Date/Time
Cristian Auer
Confirmed
Check In
Showing 1 to 1 of 1 results
Per Page
10
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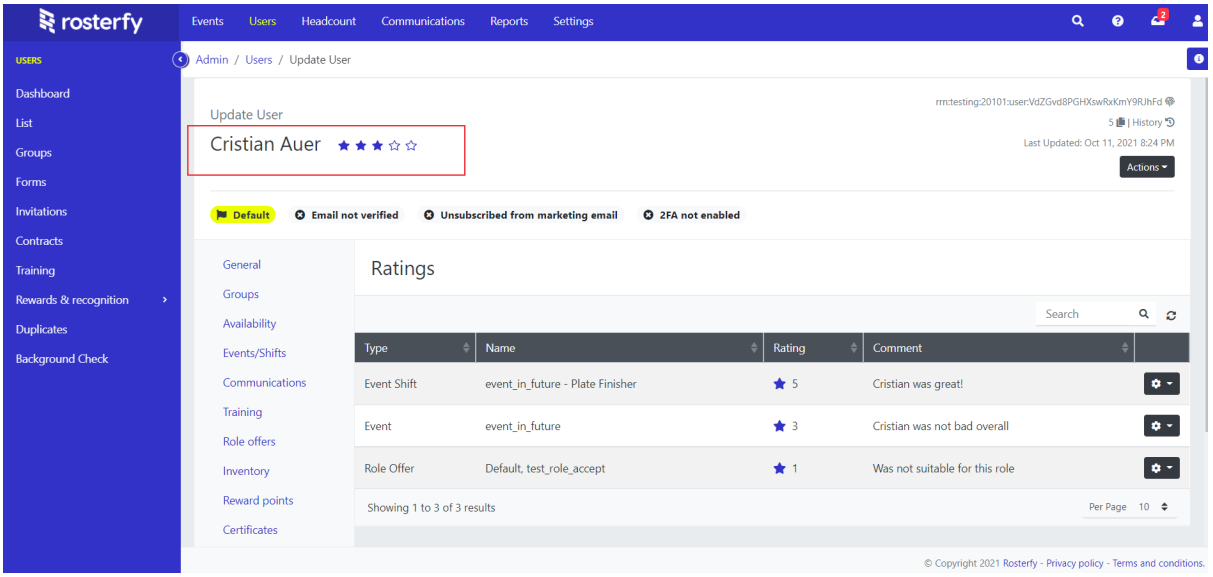
rosterfy
Events
Users
Headcount
Communications
Reports
Settings
USERS
Dashboard
List
Groups
Forms
Invitations
Contracts
Training
Rewards & recognition
Duplicates
Background Check
Admin / Users / Update User
Update User
Cristian Auer
Last Updated: Oct 11, 2021 8:24 PM
Actions
Default
Email not verified
Unsubscribed from marketing email
2FA not enabled
General
Groups
Availability
Events/Shifts
Communications
Training
Role offers
Inventory
Reward points
Certificates
Ratings
Search
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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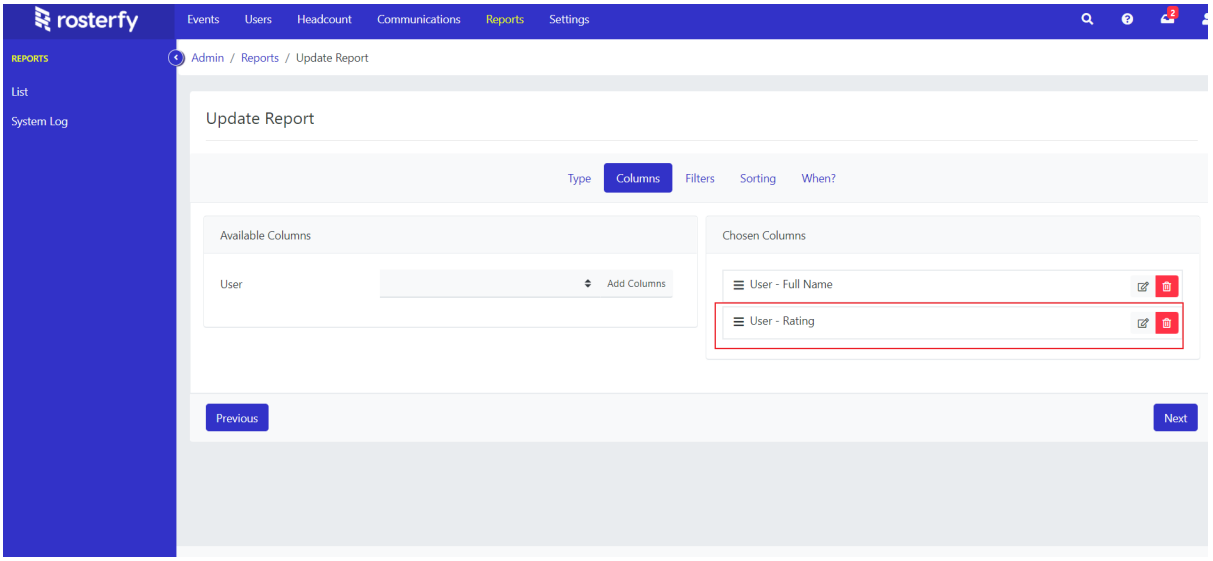


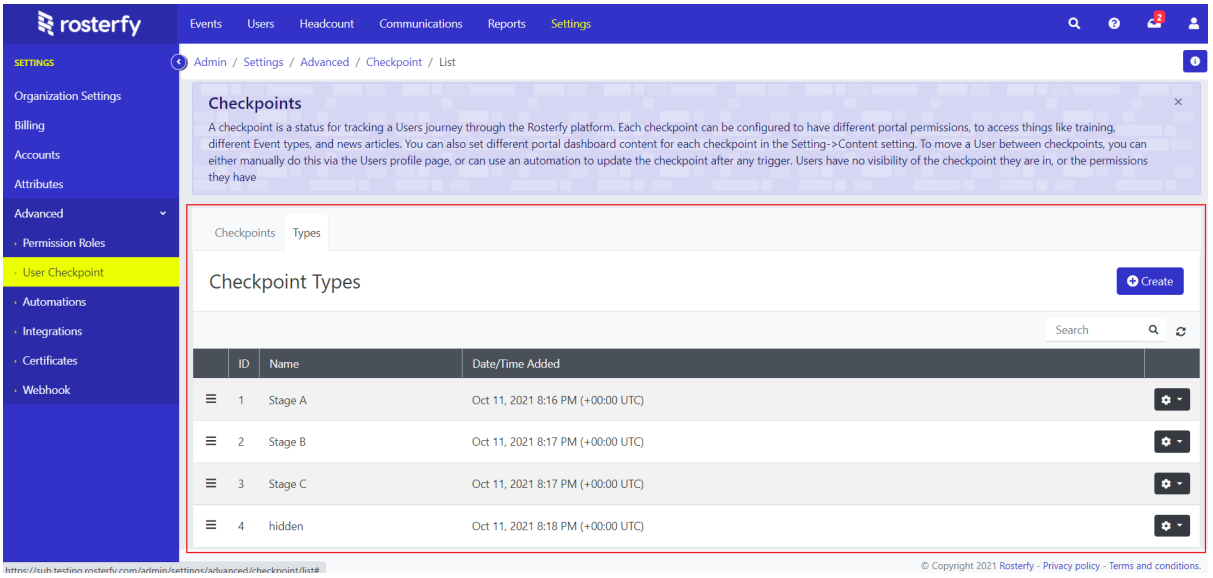
Checkpoint Type and Visualisation

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.

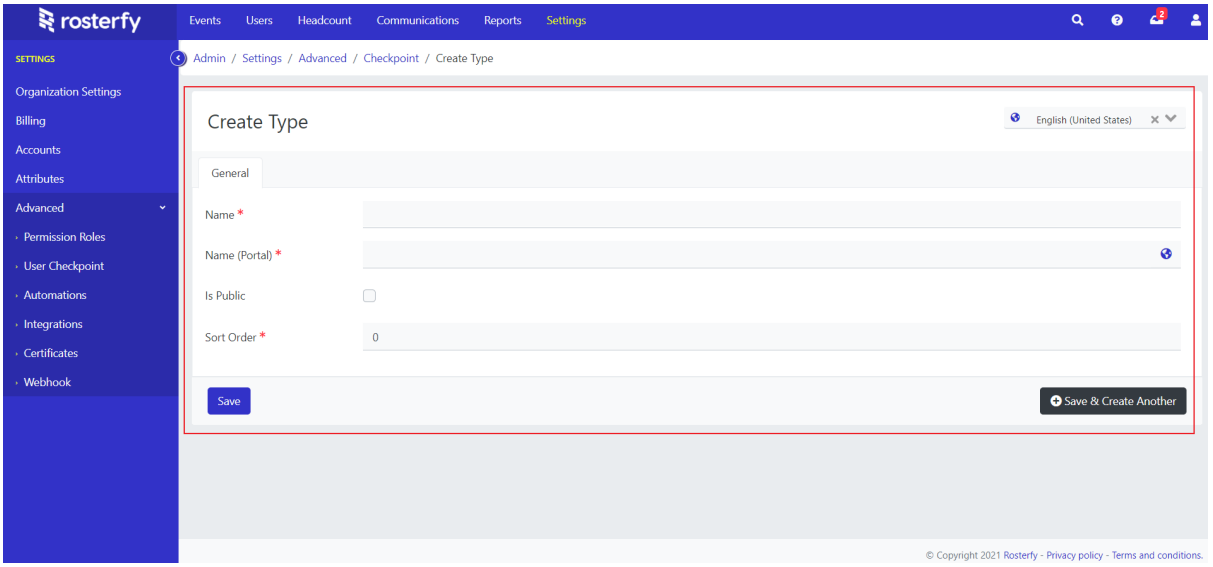
Each Checkpoint may (but not mandatory) be assigned a Checkpoint Type for this purpose, as per screenshots below. The Checkpoint Types can be public or hidden (not public). As long as a Candidate is assigned to a Public Checkpoint Type Checkpoint, the ‘My Journey’ section within the Candidate Portal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

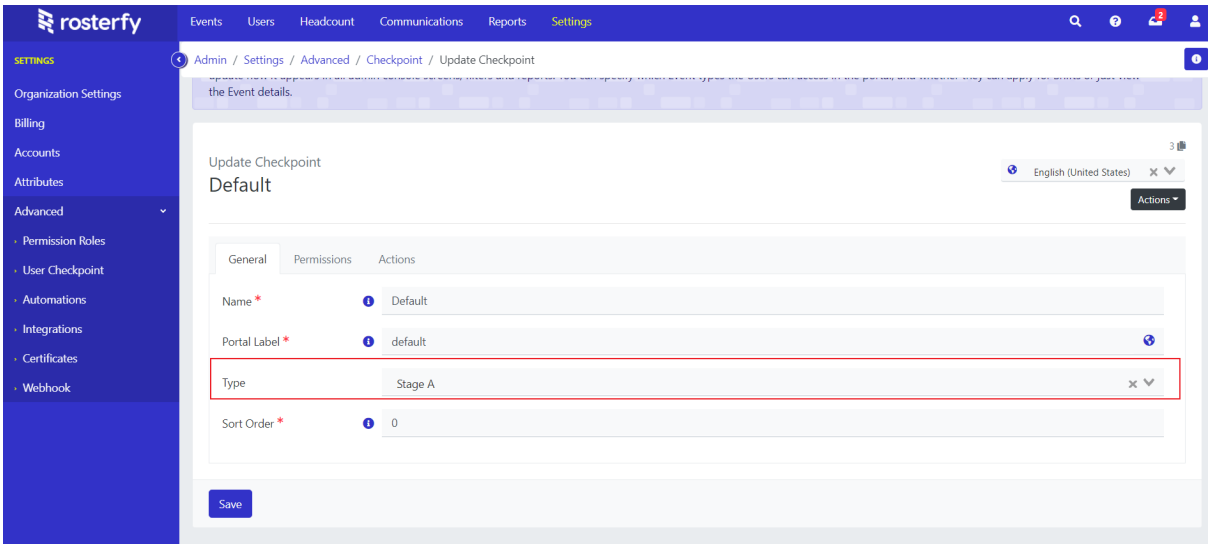
The Journey Order may be controlled by the vertical order of Checkpoint Types. A different display name to actual name may also be used, if desired.

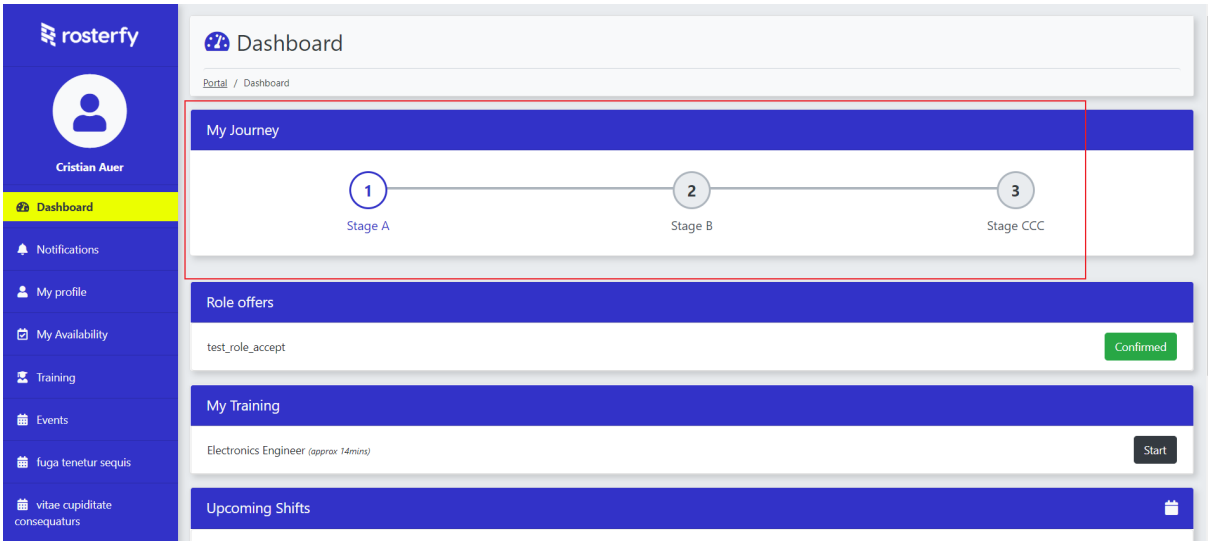
Video: https://www.loom.com/share/f21c5c03549f45cc8046b796a416ed9b



19 October 2021







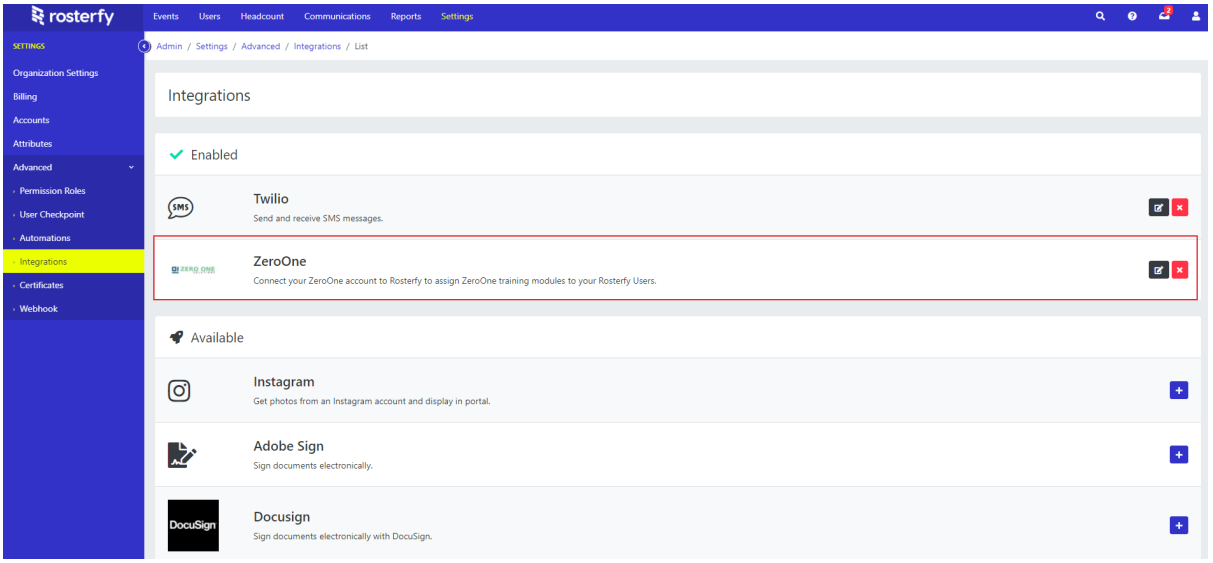
Accessibility Improvements

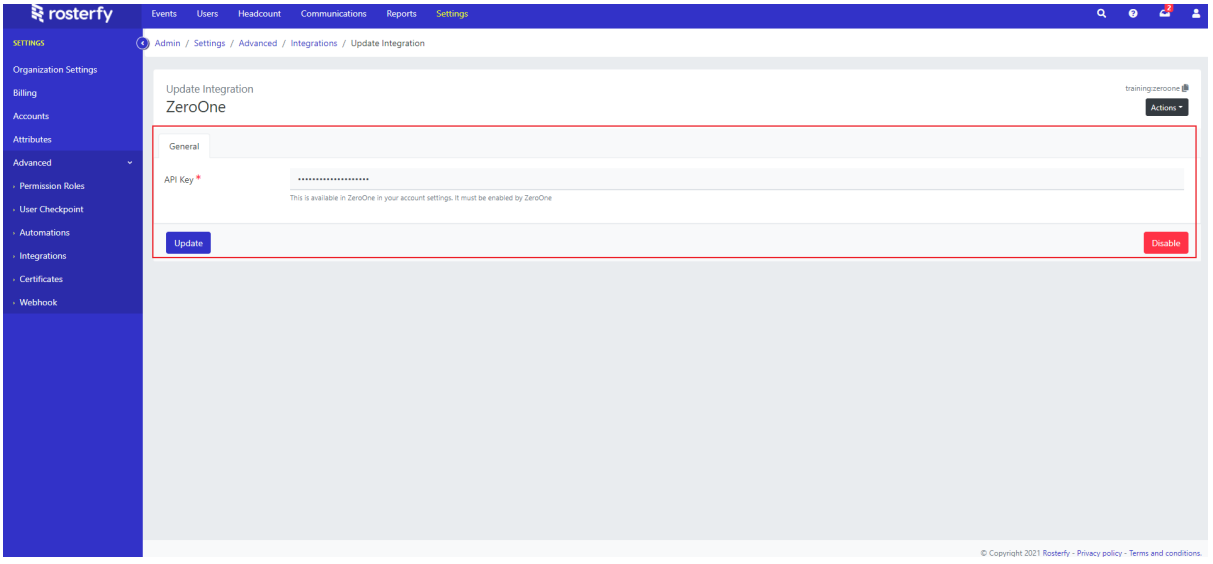
A number of smaller accessibility updates have been made across the platform, which will help improve accessibility (i.e. for visually impaired, those needing reading aides, etc.).

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.

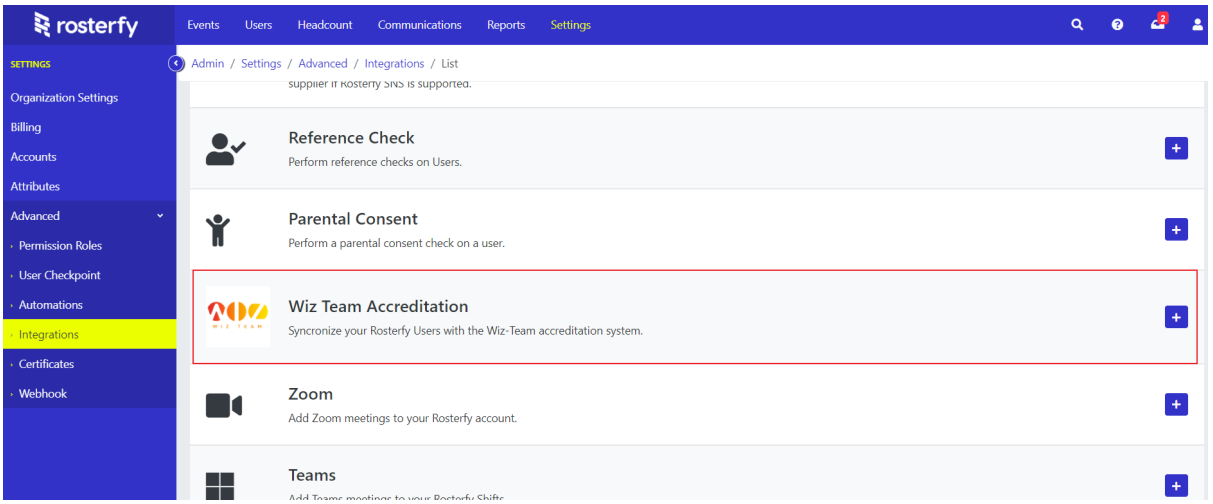


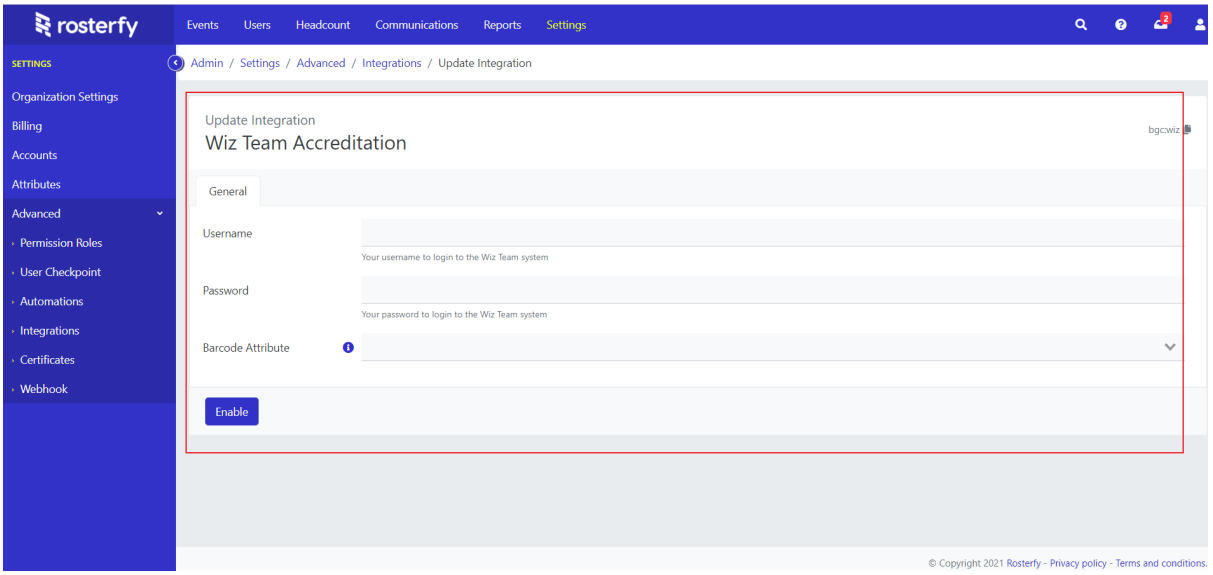


New Accreditation Integration Available: Wiz Team Accreditation

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

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.





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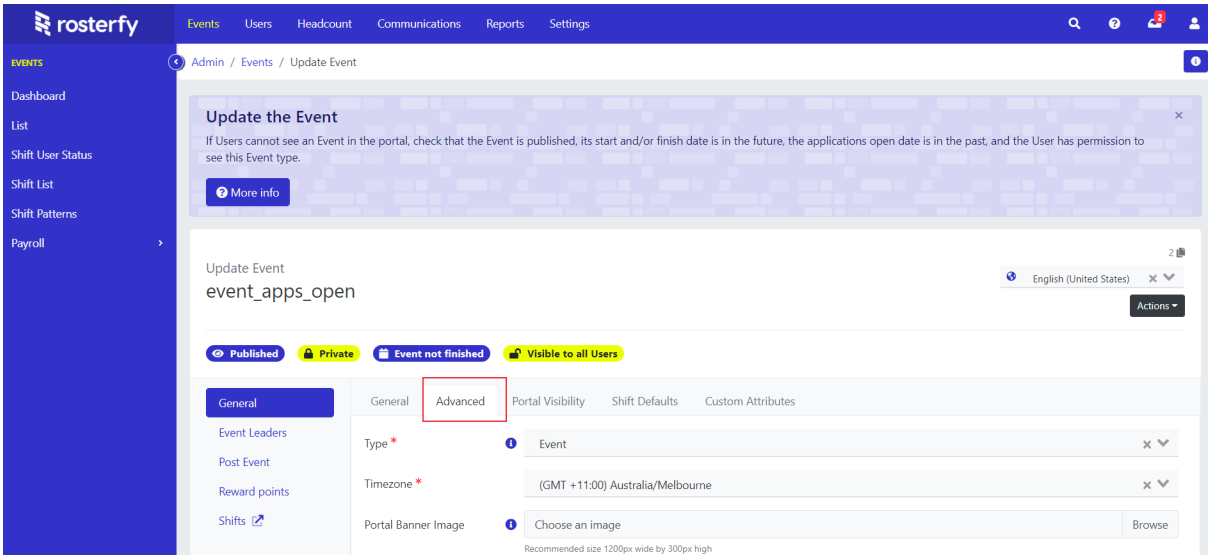
Events & Shifts

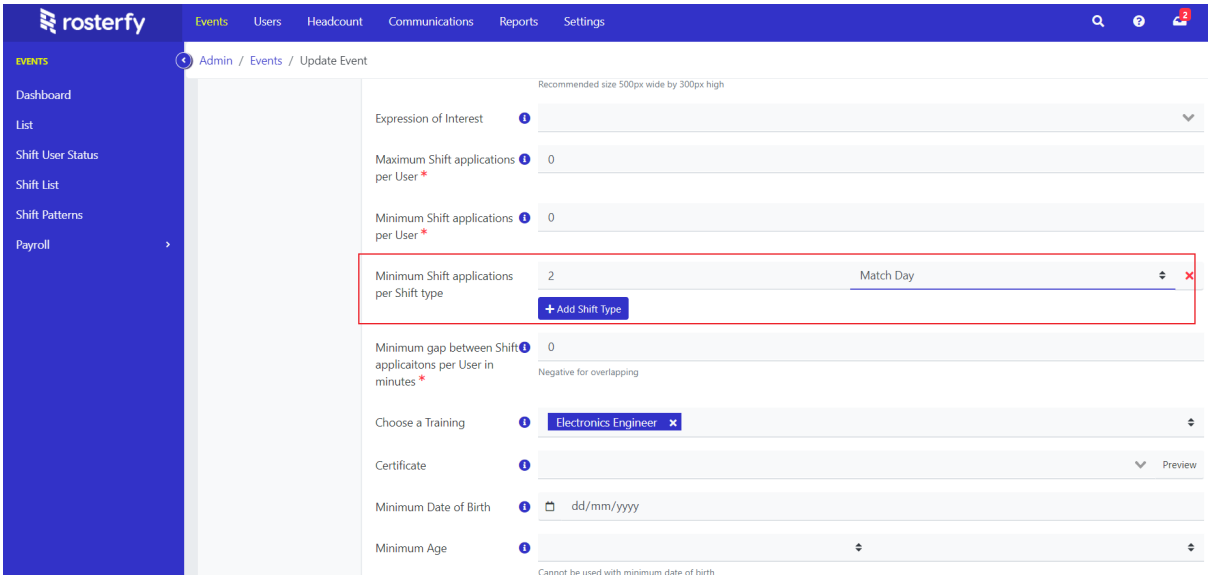
Min Shifts of Shift Type, for Event Applications

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.

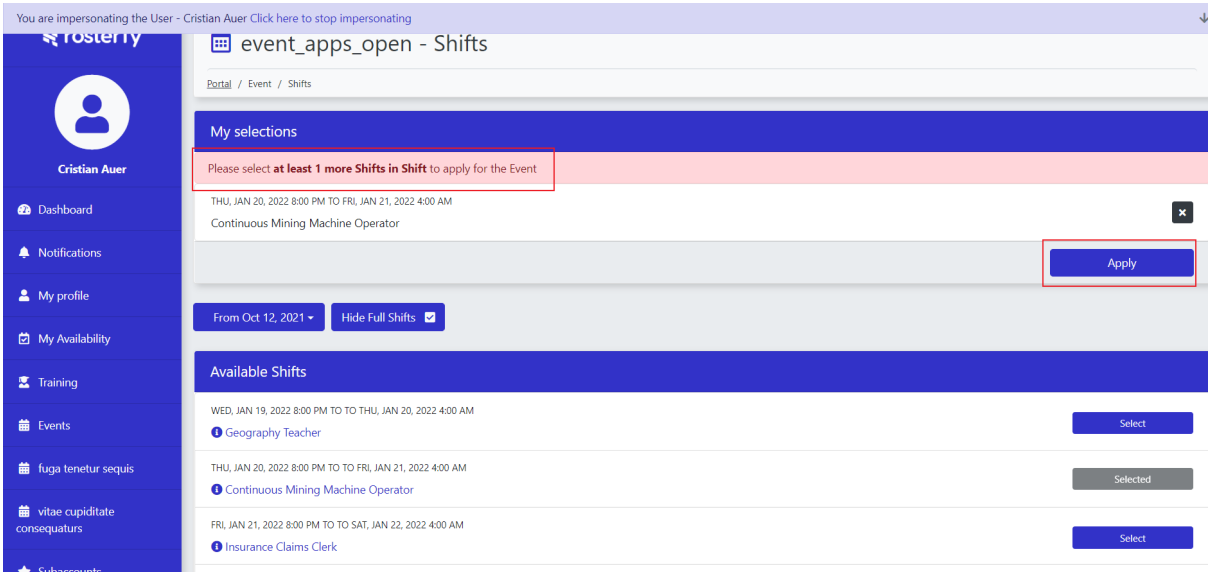
Admins will be able to set a restriction, so that when Volunteers/Staff try to apply for Shifts within the Event, at least x minimum number of Shifts of a particular Shift type, must be applied for. i.e., Volunteers/Staff must apply for at least 3 Marshalling Shifts minimum for this event, or they will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





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



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Headcount

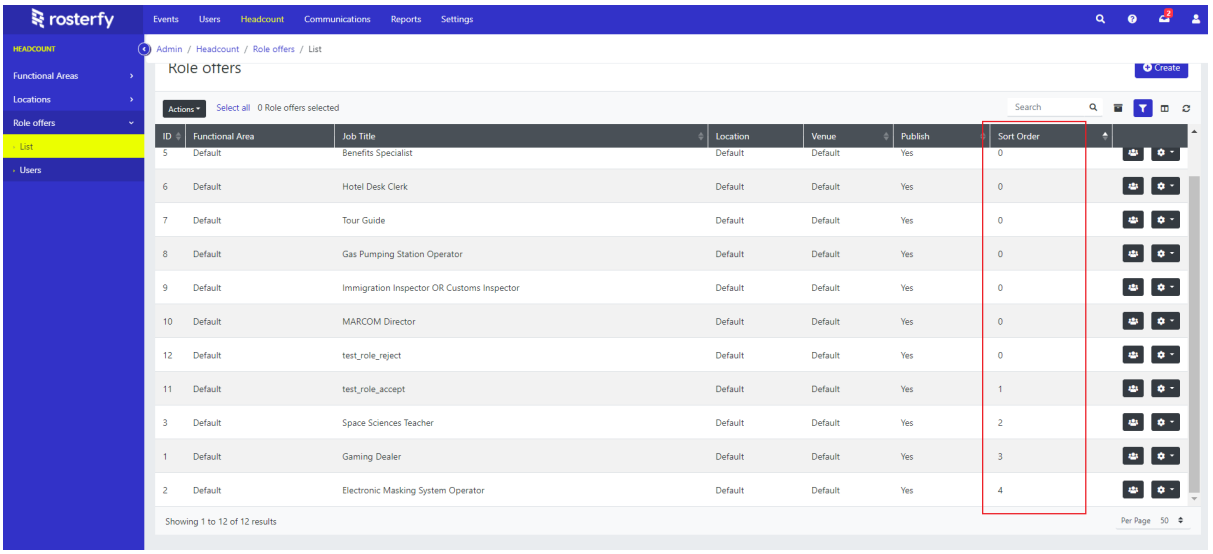
Pre Assignments

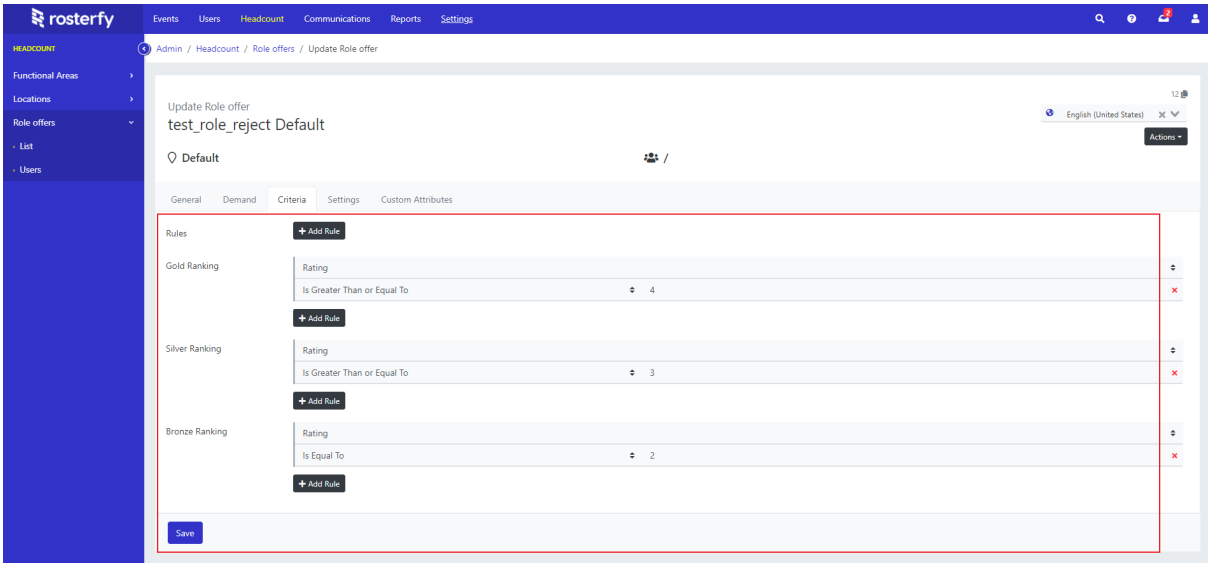
A number of updates have been included in new Preassignment functionality, within our Headcount Module. As per the screenshots below, the existing Sort Order will determine the Preassignment prioritisation.

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).

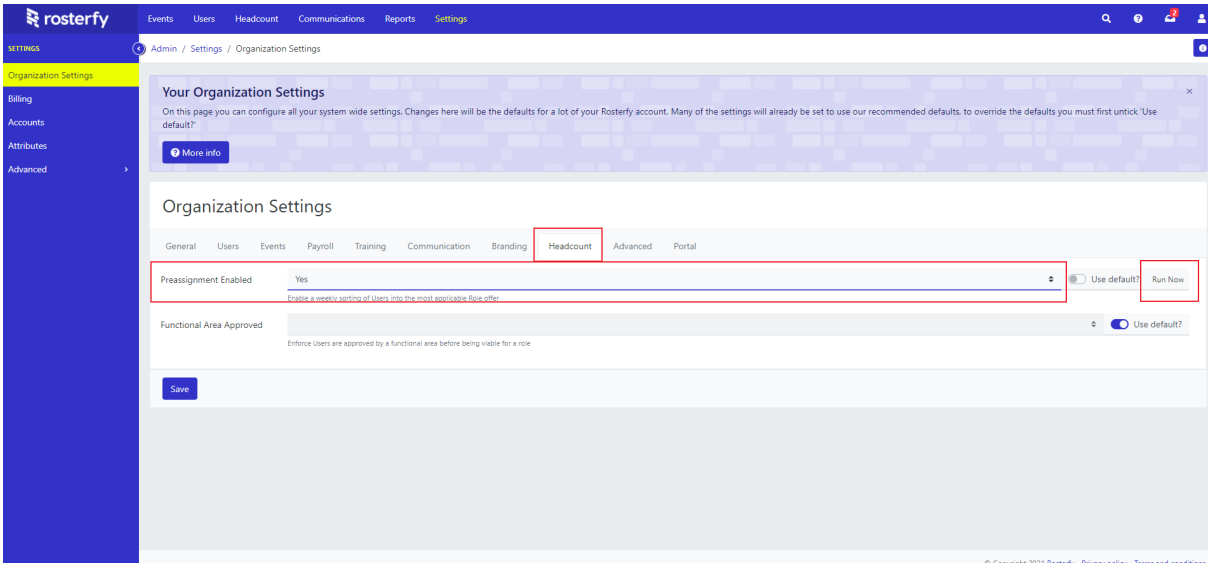
For more assistance in implementing this new functionality, please contact your CS manager.

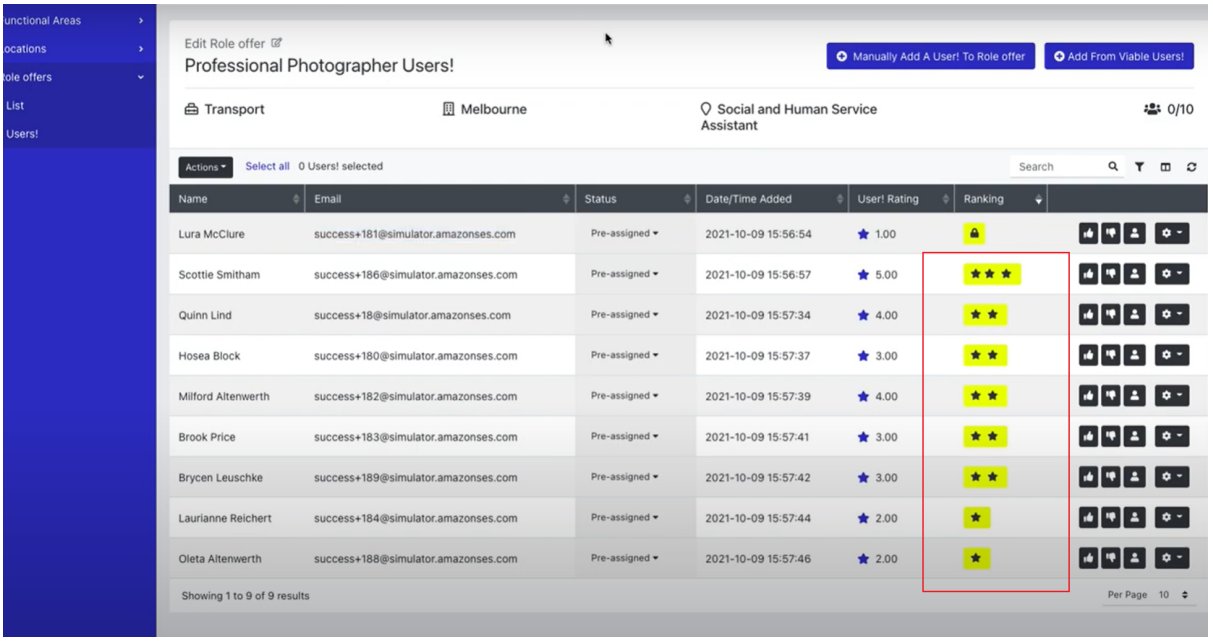
Video:
https://drive.google.com/file/d/1s11r7Tj8wHb1v0kSZr8FZAPQkRJiBzWX/view?usp=sharing





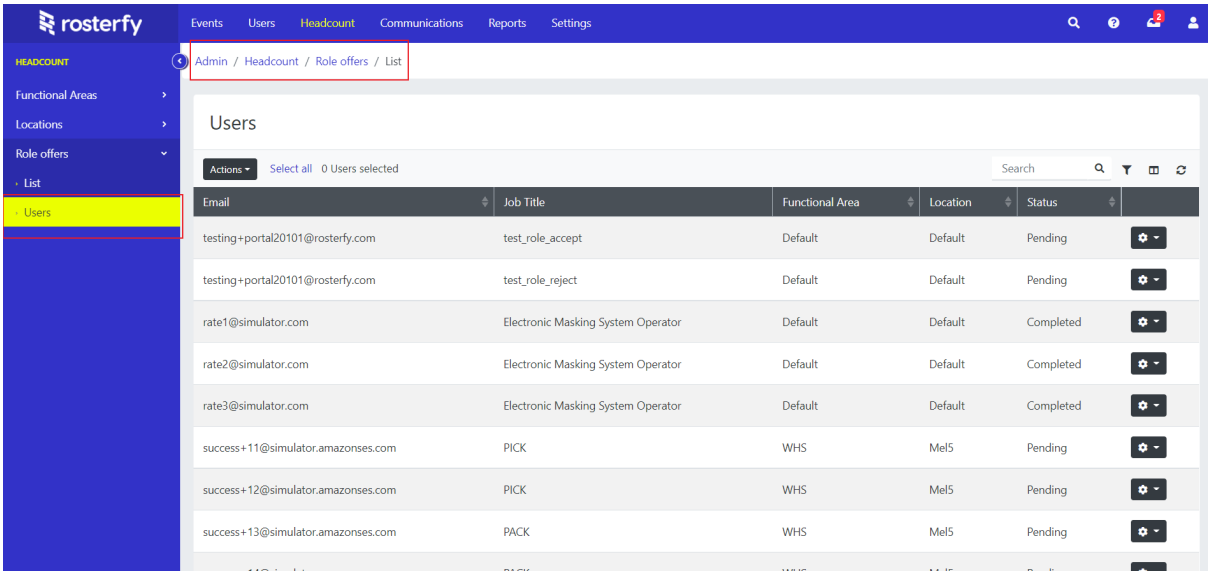
Within the Headcount section of your account Settings, you can then turn Preassignments on and select 'Run Now' which will run the Preassignments. This will process in the background, and you can see the final result below; all Users for Role below are Preassigned now, where 1, 2 and 3 stars relates 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.



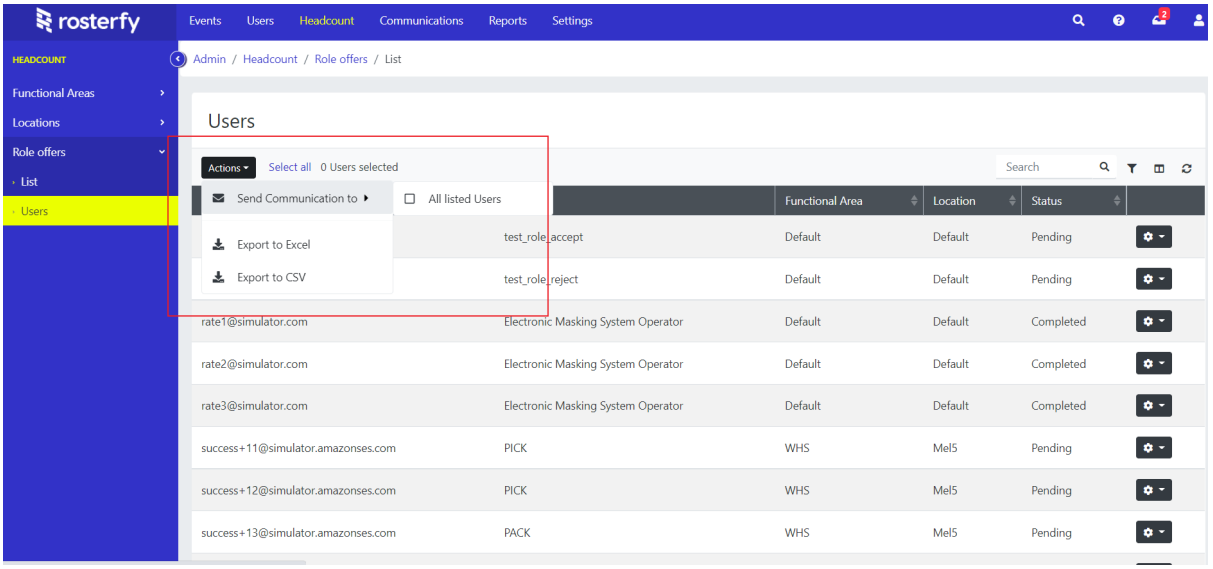


Role Offer User Listing

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.



19 October 2021



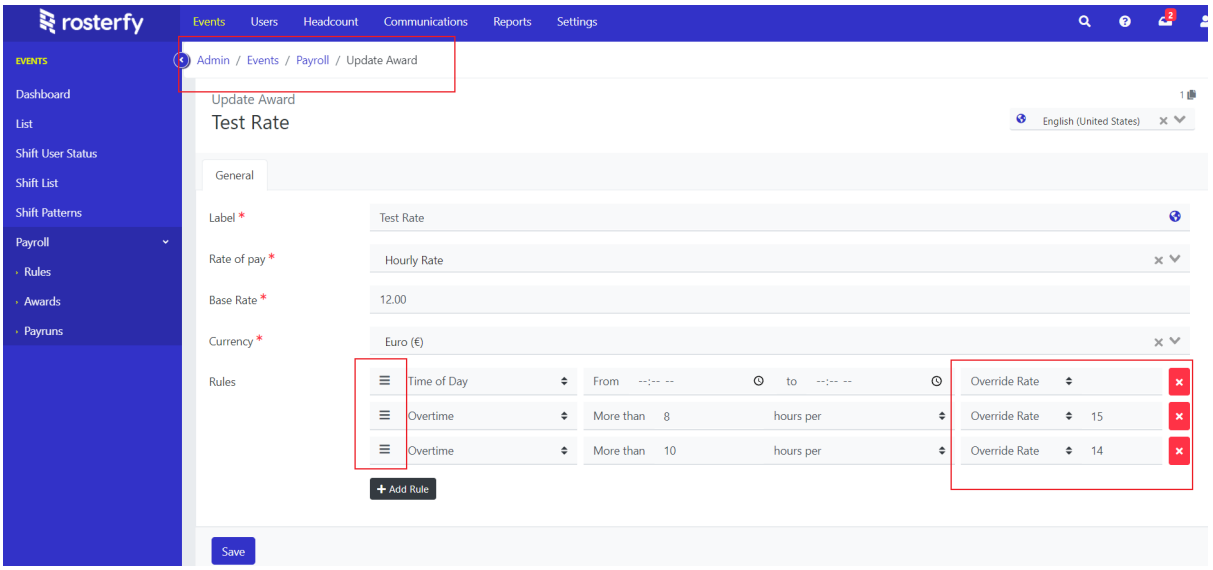
Payroll

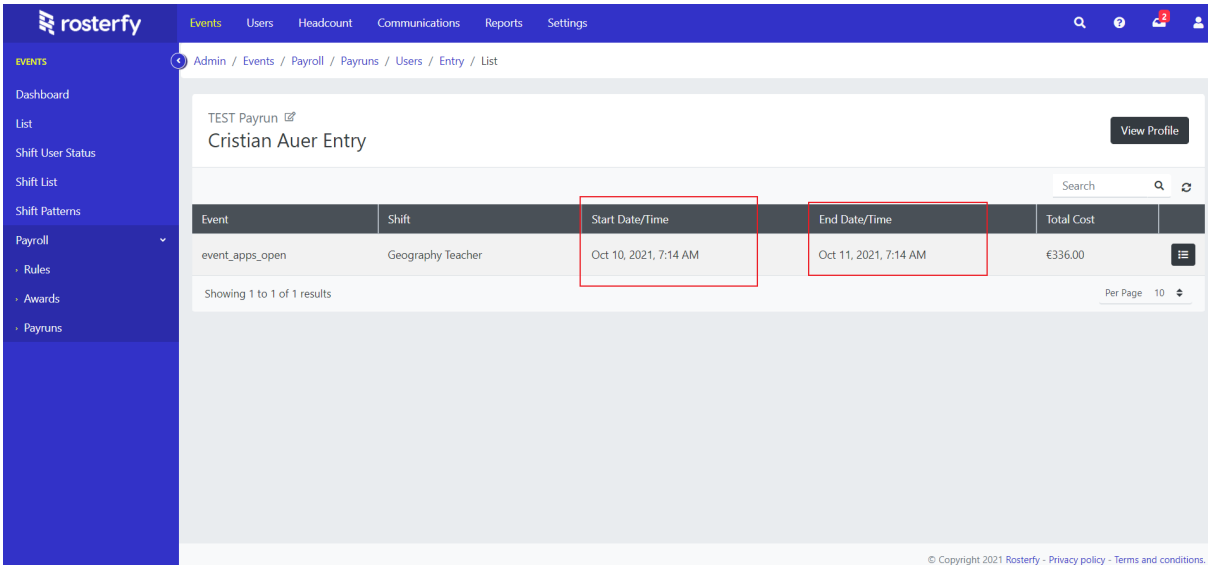
Prioritisation of Payroll Rules

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



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.