

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

Group Leader Module

We are excited to have introduced a new Group Leader Module. This is similar in part to the existing Team Leader functionality, however applies to Groups rather than Events (that Team Leaders are in charge of).

Groups will be getting an upgrade to allow the admin user to add any user as a Group leader which is then shown a star.









[Admin](#) / [Users](#) / [Groups](#) / Update Group

Profile Picture	Full Name	ID	Email	Date/Time Added	
	Kirsten Bourbous	23738048	success+97@simulator.amazonses.com	24 Nov 2021 07:26 (+00:00 GMT)	 
	Peter Parker 	23756635	nathan+uat@rosterfy.com	24 Nov 2021 07:25 (+00:00 GMT)	 
	CC GG	23787491	chris+smoke@rosterfy.com	24 Nov 2021 07:26 (+00:00 GMT)	 
	Keri Castellano	23788956	keri@rosterfy.com	24 Nov 2021 07:26 (+00:00 GMT)	 
Showing 1 to 4 of 4 results					Per Page 10

The group leader will then be able to export, view and invite anyone that is within their group via Groups I am Leading in the portal.

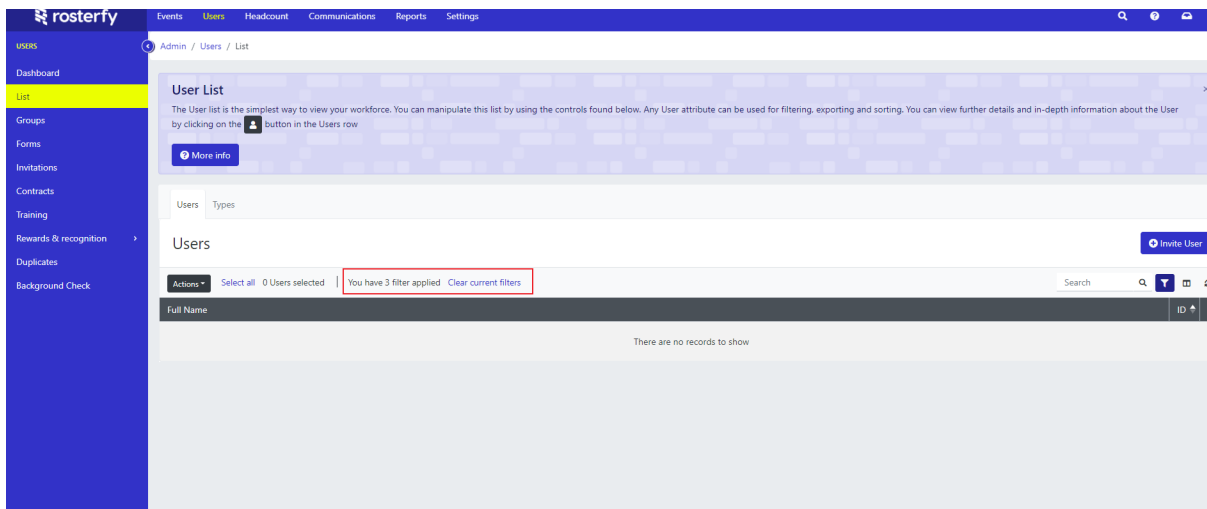
Groups I am Leading	
Group	View

In addition to viewing group members, Admin user can customise in the organisation portal settings to control what user attribute information is displayed to the group leader.

Users		 Export	 Invite
Jayan 13	(+61) 402365535	No	
 Jayan13@simulator.com	Yes	No	
 (+61) 402365535	No	No	
	No		
Jayan 14	(+61) 402365535	No	
 Jayan14@simulator.com	Yes	No	
 (+61) 402365535	No	No	
	No		
Jayan 15	(+61) 402365535	No	
 Jayan15@simulator.com	Yes	No	
 (+61) 402365535	No	No	
	No		

‘You Have Filters Applied’ Message And Clearing Option

For all tables across the Rosterfy Admin Site, a message has now been added to highlight whenever a filter has been applied, the number of filters, and an easy option to clear all filters. This will make it more obvious when there are filters applied, and also easier to simply clear all of them.



The screenshot shows the Rosterfy Admin Site interface. The top navigation bar includes links for Events, Users, Headcount, Communications, Reports, and Settings. The left sidebar lists various modules: Users, Dashboard, List, Groups, Forms, Invitations, Contracts, Training, Rewards & recognition, Duplicates, and Background Check. The main content area displays the 'User List' section, which includes a 'More info' button and a 'Users' tab. Below the tab, the 'Users' table is shown with a message bar indicating 'You have 3 filter applied. Clear current filters'. The table header includes 'Full Name' and 'ID'. The table body is empty, showing 'There are no records to show'.

Users

Types

Users

Actions ▾

Select all

0 Users selected

You have 3 filter applied

Clear current filters

Full Name

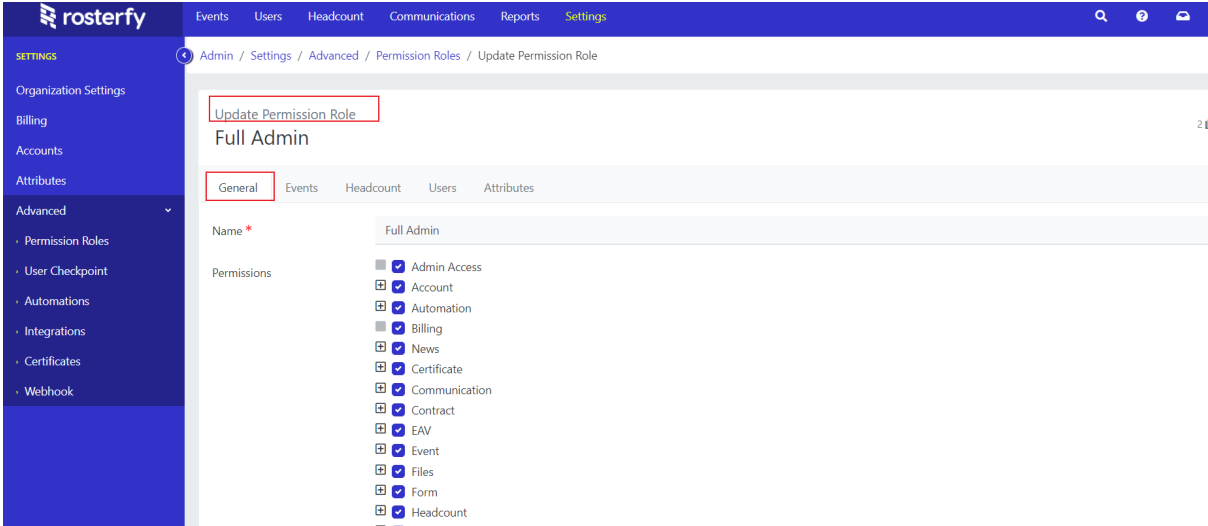
There are no records to show

Admin Permission Role Prefill Values

Within Permission Roles for Admins, you are now able to set up 'prefill values'. This will auto-prefill values whenever encountered across creating various areas of the system, which will save Admins significant time when a particular value is always the same.

There are a number of values across the Event, Event Shift, Role Offer and Reward and Recognition areas that can be set as a prefill.

As per the screenshots below, you can see that by setting, for example, an Event Name prefill, every time an Admin under this Permission Role goes to Create an Event, that name field is pre-filled. Note that it is prefilled, but not locked. This will be the case for any fields that are added under the prefill options here.



rosterfy

Events Users Headcount Communications Reports Settings

Admin / Settings / Advanced / Permission Roles / Update Permission Role

Update Permission Role

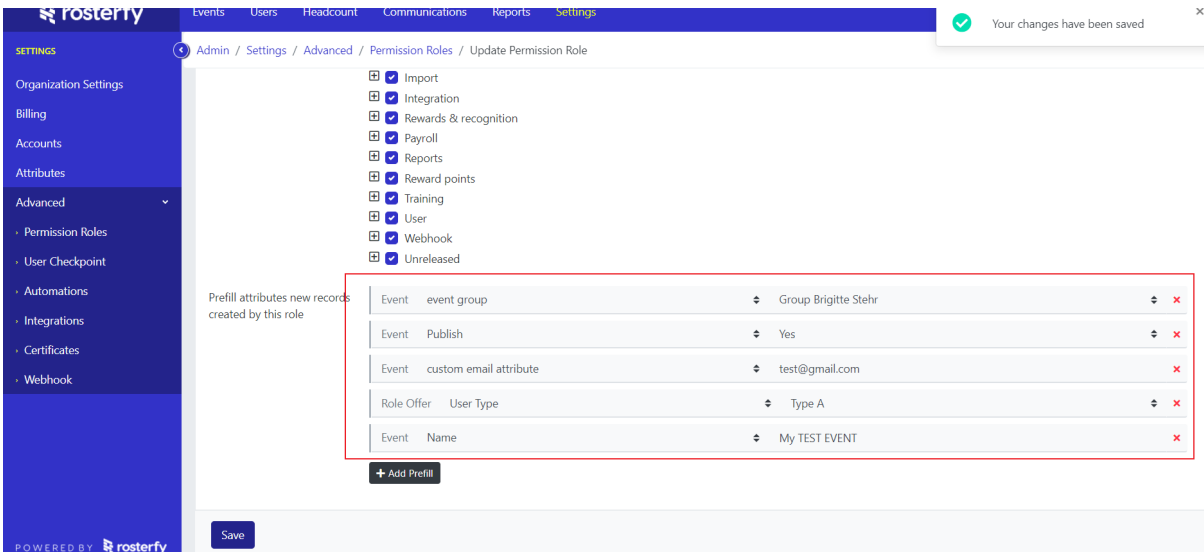
Full Admin

General Events Headcount Users Attributes

Name * Full Admin

Permissions

- ☒ Admin Access
- ☒ Account
- ☒ Automation
- ☒ Billing
- ☒ News
- ☒ Certificate
- ☒ Communication
- ☒ Contract
- ☒ EAV
- ☒ Event
- ☒ Files
- ☒ Form
- ☒ Headcount



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Events Users Headcount Communications Reports Settings

Admin / Settings / Advanced / Permission Roles / Update Permission Role

Import

Integration

Rewards & recognition

Payroll

Reports

Reward points

Training

User

Webhook

Unreleased

Prefill attributes new records created by this role

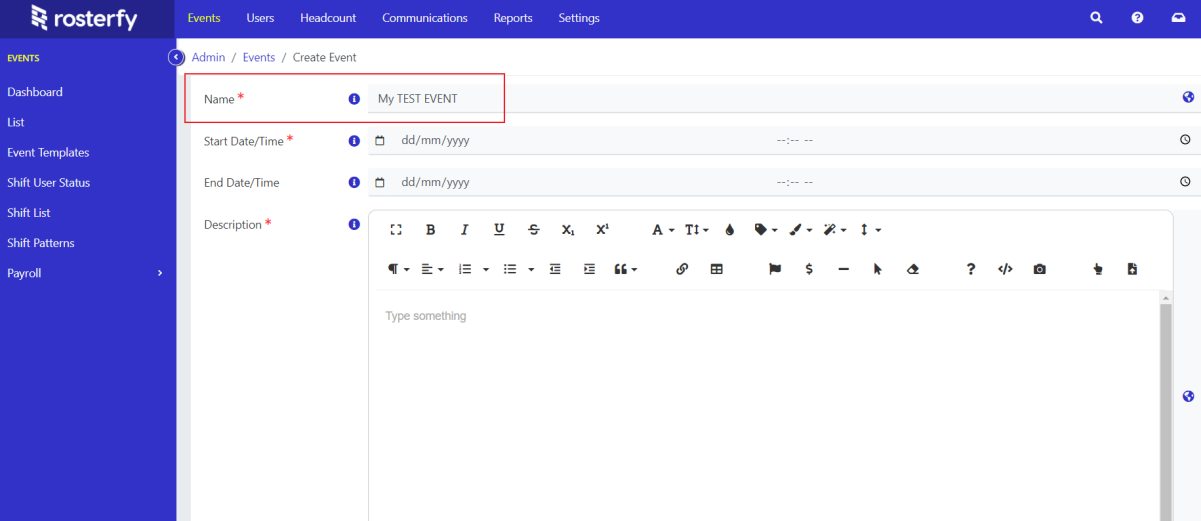
Event	event group	Group Brigitte Stehr	
Event	Publish	Yes	
Event	custom email attribute	test@gmail.com	
Role Offer	User Type	Type A	
Event	Name	My TEST EVENT	

+ Add Prefill

Save

POWERED BY rosterfy

Your changes have been saved



rosterfy Events Users Headcount Communications Reports Settings

Admin / Events / Create Event

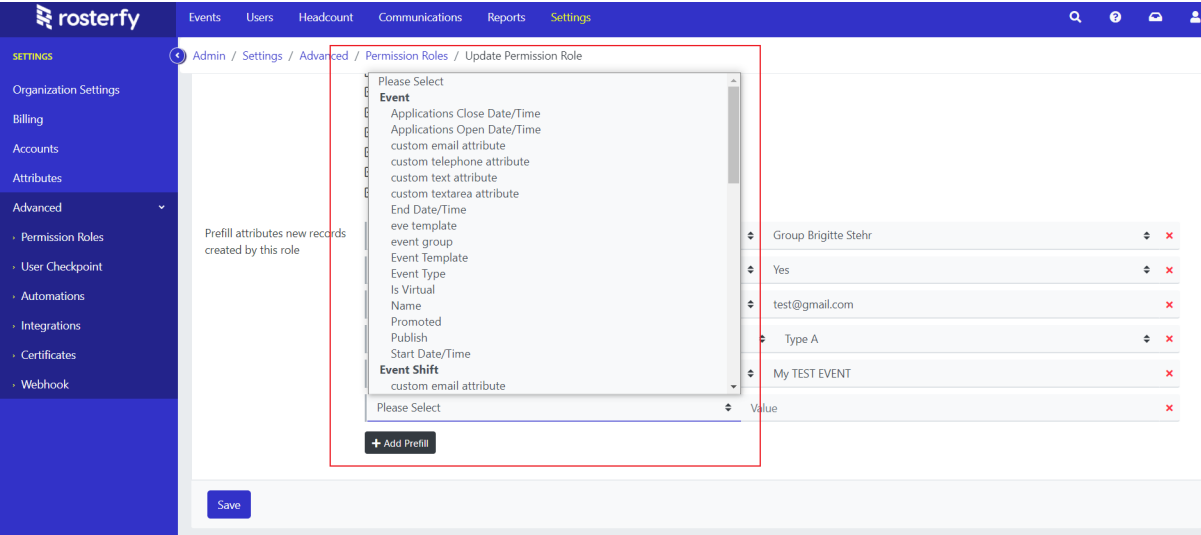
Name * My TEST EVENT

Start Date/Time * dd/mm/yyyy

End Date/Time dd/mm/yyyy

Description *

Type something



rosterfy Events Users Headcount Communications Reports Settings

Admin / Settings / Advanced / Permission Roles / Update Permission Role

Please Select

Event

- Applications Close Date/Time
- Applications Open Date/Time
- custom email attribute
- custom telephone attribute
- custom text attribute
- custom textarea attribute
- End Date/Time
- eve template
- event group
- Event Template
- Event Type
- Is Virtual
- Name
- Promoted
- Publish
- Start Date/Time

Event Shift

- custom email attribute

Please Select

+ Add Prefill

Group Brigitte Stehr

Yes

test@gmail.com

Type A

My TEST EVENT

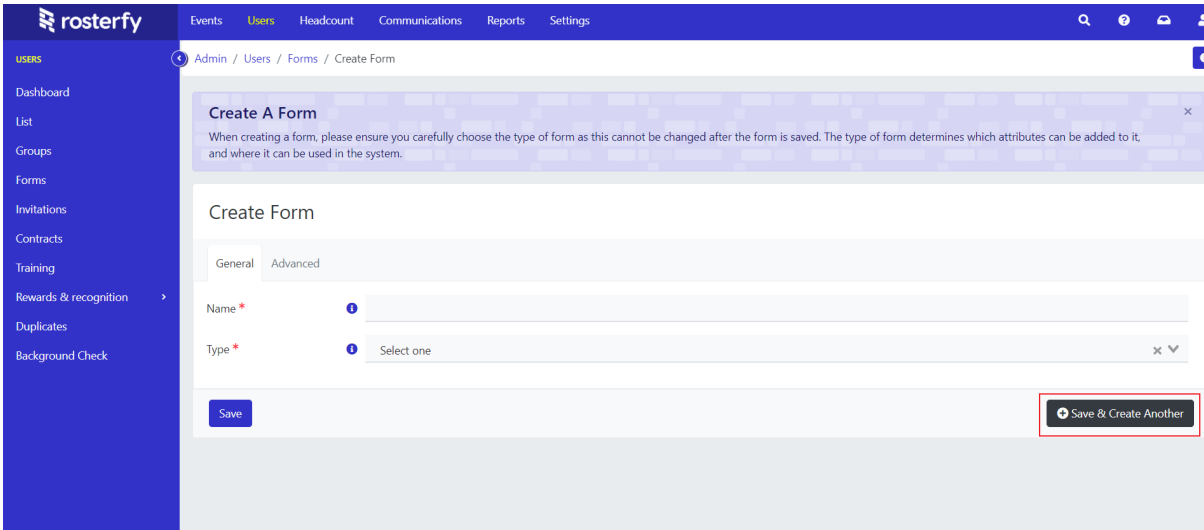
Value

Save

‘Save & Create Another’ Added To More Places

The option to ‘Save & Create Another’ has been added to a number of additional places within the Admin Site. This will allow Admins to more seamlessly create multiple manual items in one session without having to click back into the same ‘create’ page.

- Files
- Groups
- Training
- News
- Notifications, emails and sms templates
- Automations and Automation Actions
- Payroll Rules
- Permission Roles
- Branding
- Weblinks



rosterfy Events Users Headcount Communications Reports Settings

Admin / Users / Forms / Create Form

Create A Form

When creating a form, please ensure you carefully choose the type of form as this cannot be changed after the form is saved. The type of form determines which attributes can be added to it, and where it can be used in the system.

Create Form

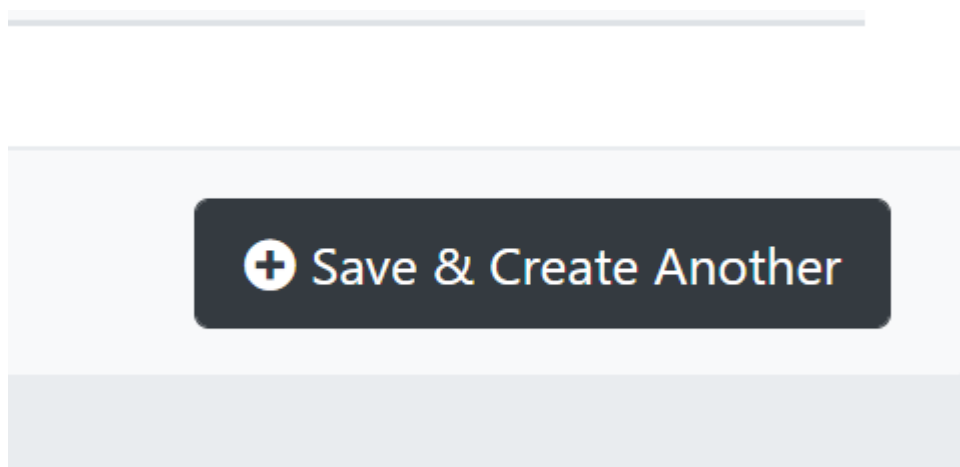
General Advanced

Name *

Type *

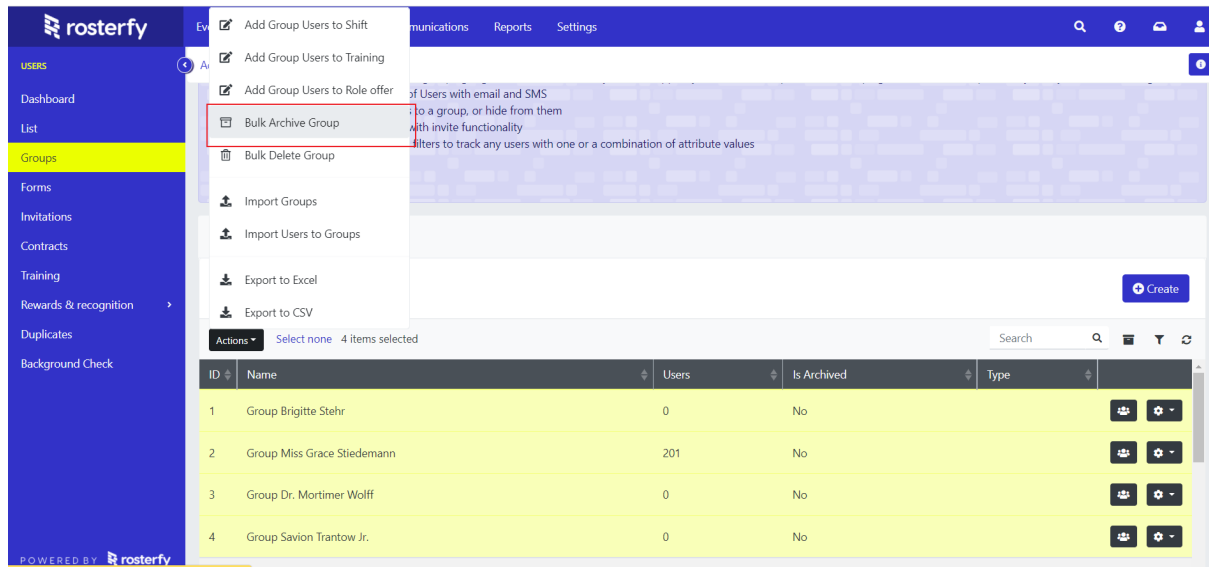
Save

Save & Create Another



Bulk Archive Groups

Admins are now able to perform the action to Bulk Archive Groups that are selected on the Groups page list. This will save Admins time from individually archiving Groups manually.



sub.testing.rosterfy.com says

Are you sure want to archive 4 Groups?

OK

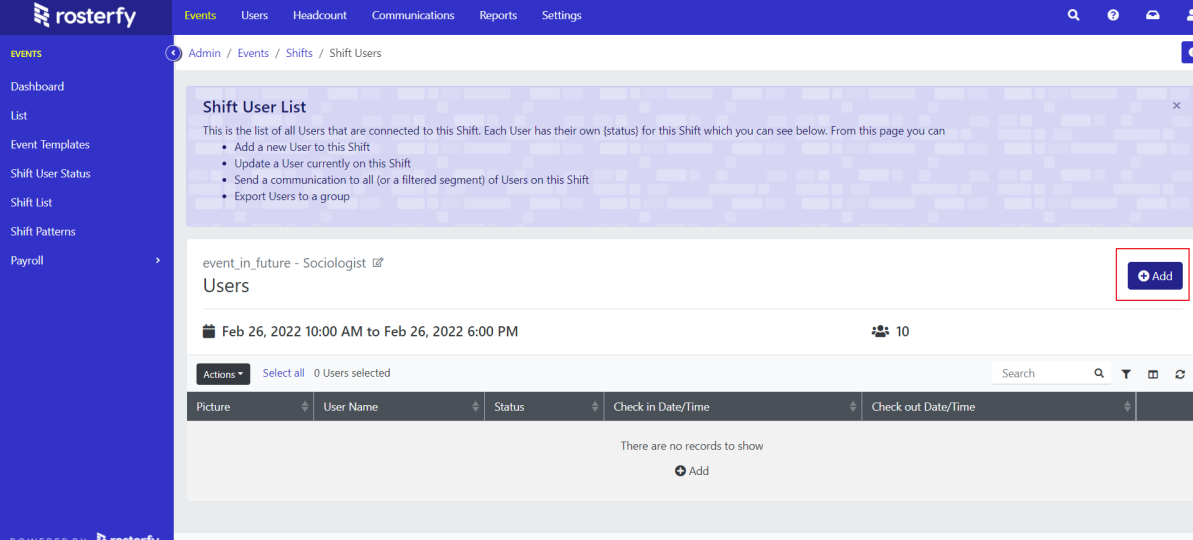
Cancel

Improved Quick Add User Functionality

Admins will now see an improved UI update across the platform, wherever there is the option to add users. This is a better experience for admins to easily pick and choose users to add into the desired list. They can be added with a simple drag and drop.

This has been included across:


- Role Offers and Role Offer Functional Areas
- Training
- Groups
- Shifts
- Inventory
- Permissions
- Timesheets
- Communications



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 - Sociologist 


Users


Feb 26, 2022 10:00 AM to Feb 26, 2022 6:00 PM 10

Actions Select all 0 Users selected

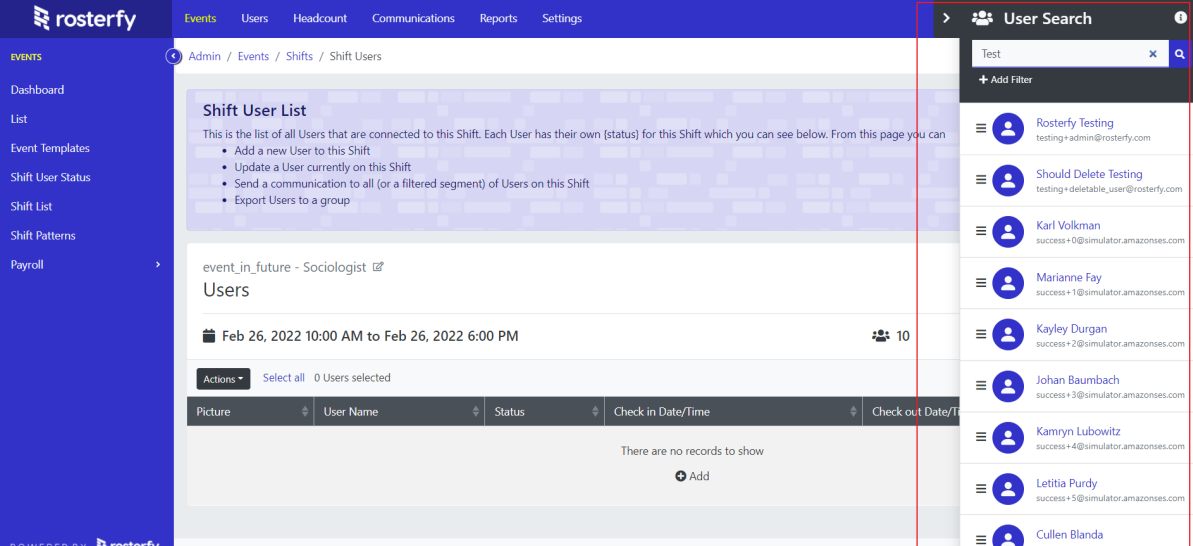
Search   

Picture	User Name	Status	Check in Date/Time	Check out Date/Time
There are no records to show				

 Add

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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 - Sociologist 


Users

Feb 26, 2022 10:00 AM to Feb 26, 2022 6:00 PM 10


Actions Select all 0 Users selected

Search   










Picture	User Name	Status	Check in Date/Time	Check out Date/Time
There are no records to show				

 Add

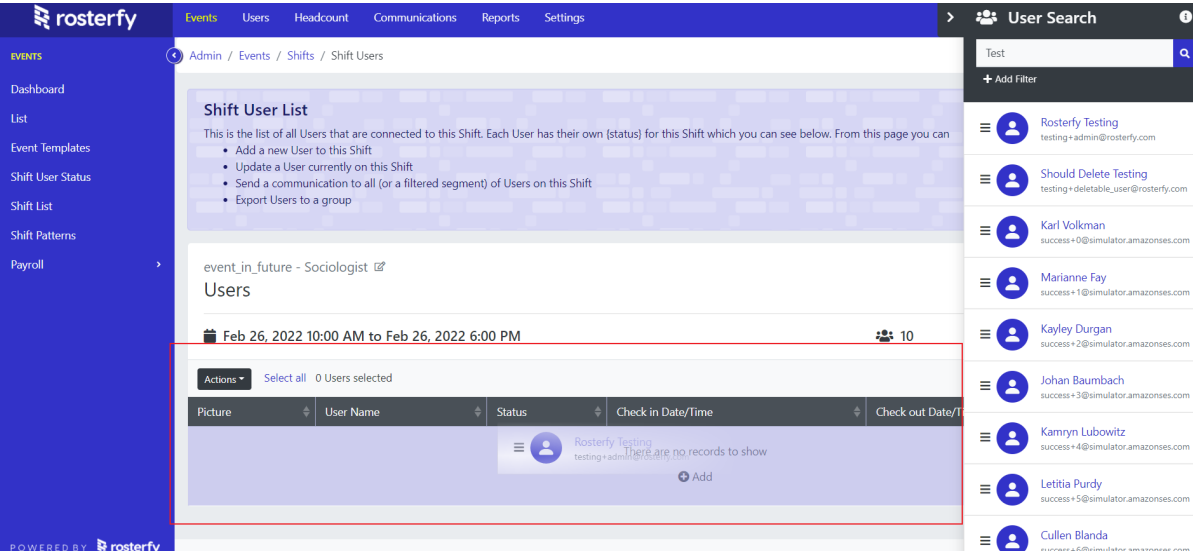
User Search

Test 

+ Add Filter

-  Rosterfy Testing
testing+admin@rosterfy.com
-  Should Delete Testing
testing+deletable_user@rosterfy.com
-  Karl Volkman
success+0@simulator.amazonses.com
-  Marianne Fay
success+1@simulator.amazonses.com
-  Kayley Durgan
success+2@simulator.amazonses.com
-  Johan Baumbach
success+3@simulator.amazonses.com
-  Kamryn Lubowitz
success+4@simulator.amazonses.com
-  Letitia Purdy
success+5@simulator.amazonses.com
-  Cullen Blanda
success+6@simulator.amazonses.com


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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 - Sociologist 


Users

Feb 26, 2022 10:00 AM to Feb 26, 2022 6:00 PM 10


Actions Select all 0 Users selected

Search   










Picture	User Name	Status	Check in Date/Time	Check out Date/Time
There are no records to show				

 Add

User Search

Test 

+ Add Filter

-  Rosterfy Testing
testing+admin@rosterfy.com
-  Should Delete Testing
testing+deletable_user@rosterfy.com
-  Karl Volkman
success+0@simulator.amazonses.com
-  Marianne Fay
success+1@simulator.amazonses.com
-  Kayley Durgan
success+2@simulator.amazonses.com
-  Johan Baumbach
success+3@simulator.amazonses.com
-  Kamryn Lubowitz
success+4@simulator.amazonses.com
-  Letitia Purdy
success+5@simulator.amazonses.com
-  Cullen Blanda
success+6@simulator.amazonses.com

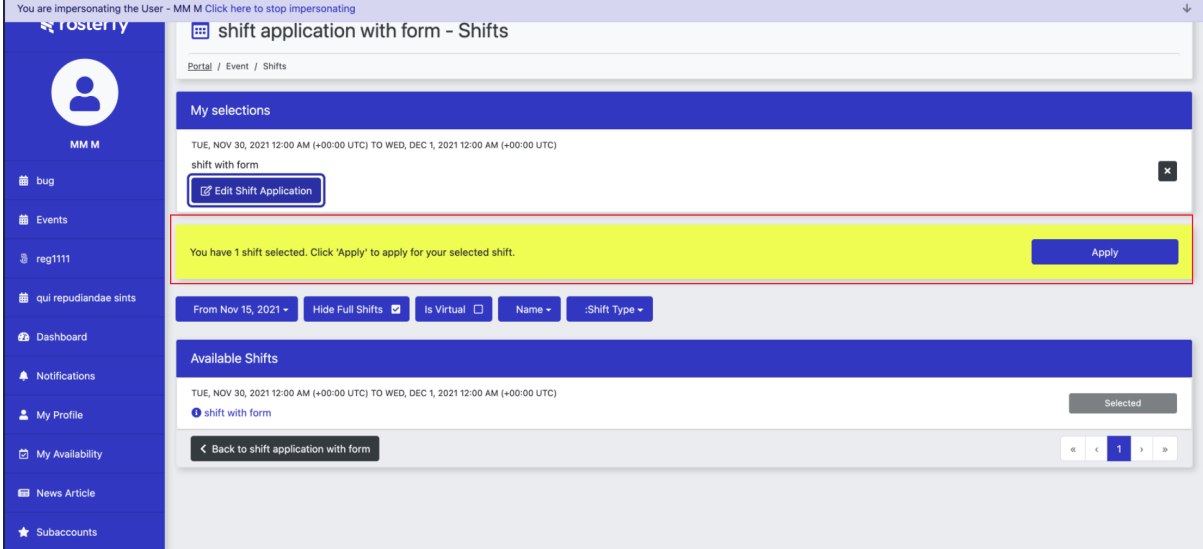
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Events & Shifts

Shift Application Form Submitting Visual Updates

For Volunteers/Staff applying for shifts in the Candidate Portal, the 'Apply' button has been made far more obvious. This is following feedback that at times Volunteers/Staff may mistake the selection of shifts for application, and then forget to apply.

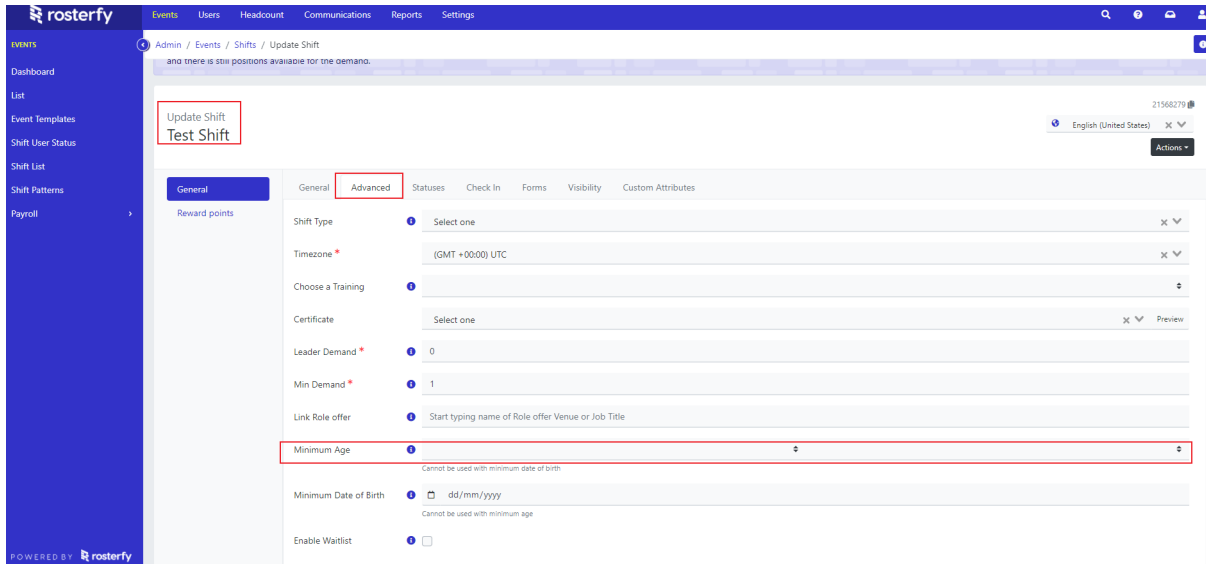
See the screenshot below.



The screenshot displays the Rosterfy interface for shift applications. The top navigation bar indicates the user is impersonating 'MM M' and provides a link to stop impersonating. The main title is 'shift application with form - Shifts'. The sidebar on the left contains navigation links: bug, Events, reg1111, qui repudiandae sint, Dashboard, Notifications, My Profile, My Availability, News Article, and Subaccounts. The main content area is divided into two sections: 'My selections' and 'Available Shifts'. The 'My selections' section shows a selected shift for 'TUE, NOV 30, 2021 12:00 AM (+00:00 UTC) TO WED, DEC 1, 2021 12:00 AM (+00:00 UTC)' with the title 'shift with form'. An 'Edit Shift Application' button is visible. Below this, a yellow banner states 'You have 1 shift selected. Click 'Apply' to apply for your selected shift.' with a prominent 'Apply' button. The 'Available Shifts' section shows the same date range and title, with a 'Selected' button. A pagination bar at the bottom indicates '1' of 1 items.

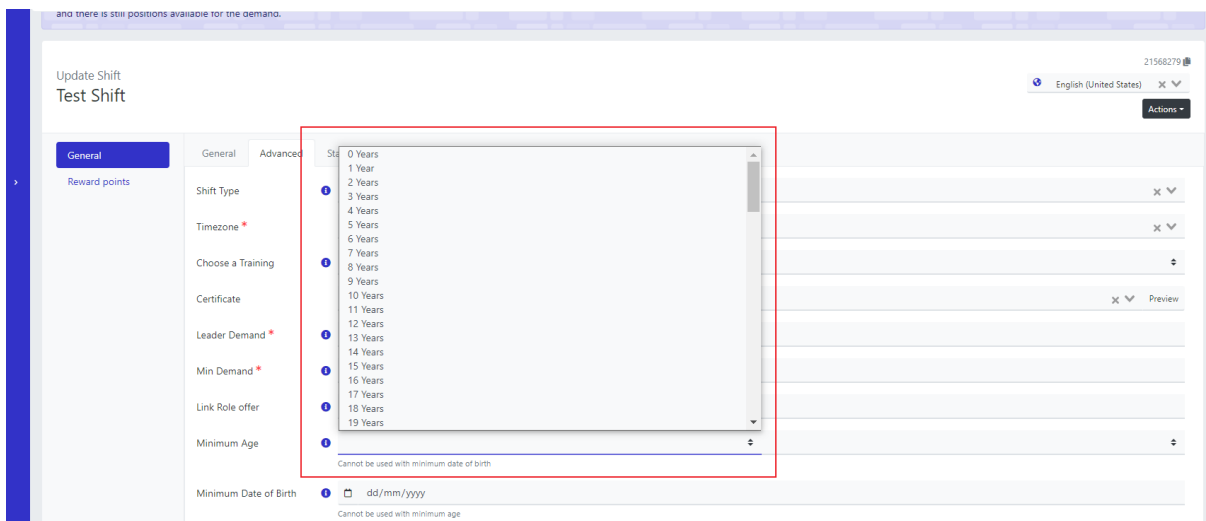
Minimum Age Per Shift

Admins are now able to set a Minimum Age Per Shift restriction. This can be done by both Years and Months. Previously this was available at the Event level, and from customer feedback we have added it to the Shift level also. This will allow Admins to have greater control over shifts within an event where only Volunteers/Staff of a certain age should be allowed (i.e. some shifts may involve serving alcohol and therefore have an age restriction)



The screenshot shows the 'Update Shift' form for 'Test Shift' in the 'Advanced' tab. The 'Minimum Age' field is highlighted with a red box and is currently set to 0. Below the field, a note states: 'Cannot be used with minimum date of birth'.

Field	Value
Shift Type	Select one
Timezone *	(GMT +00:00) UTC
Choose a Training	
Certificate	Select one
Leader Demand *	0
Min Demand *	1
Link Role offer	Start typing name of Role offer Venue or Job Title
Minimum Age	0
Minimum Date of Birth	dd/mm/yyyy
Enable Waitlist	<input type="checkbox"/>

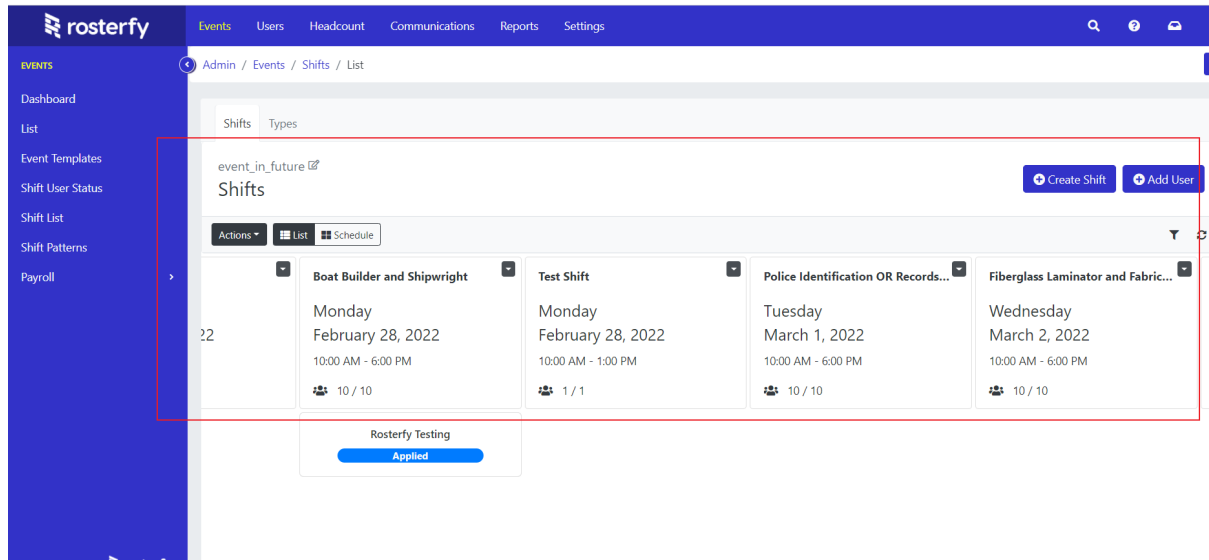


The screenshot shows the 'Update Shift' form for 'Test Shift' in the 'Advanced' tab. The 'Minimum Age' dropdown menu is open, displaying a list of age options from 0 Years to 19 Years. The 'Minimum Age' field is highlighted with a red box.

Field	Value
Shift Type	Select one
Timezone *	(GMT +00:00) UTC
Choose a Training	
Certificate	Select one
Leader Demand *	0
Min Demand *	1
Link Role offer	Start typing name of Role offer Venue or Job Title
Minimum Age	0 Years
Minimum Date of Birth	dd/mm/yyyy
Enable Waitlist	<input type="checkbox"/>

Day Of Week and Total Demand Added To Shifts In Schedule View

For Users, Shifts now have clear details on the Schedule View with the Weekday and Date clearly displayed. This will help Users clearly understand and differentiate between different shifts that may look and be titled similarly, but are on different days.

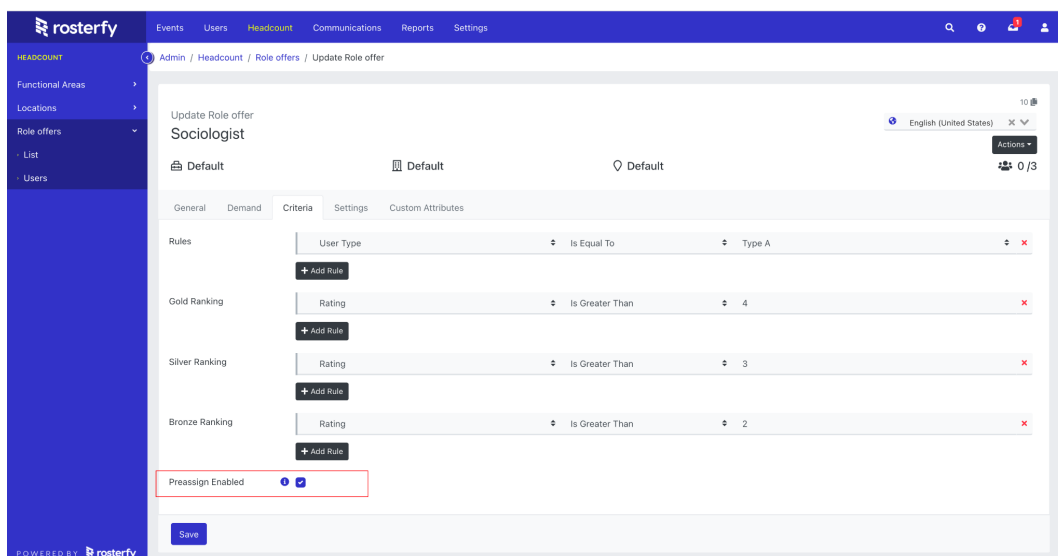


Headcount

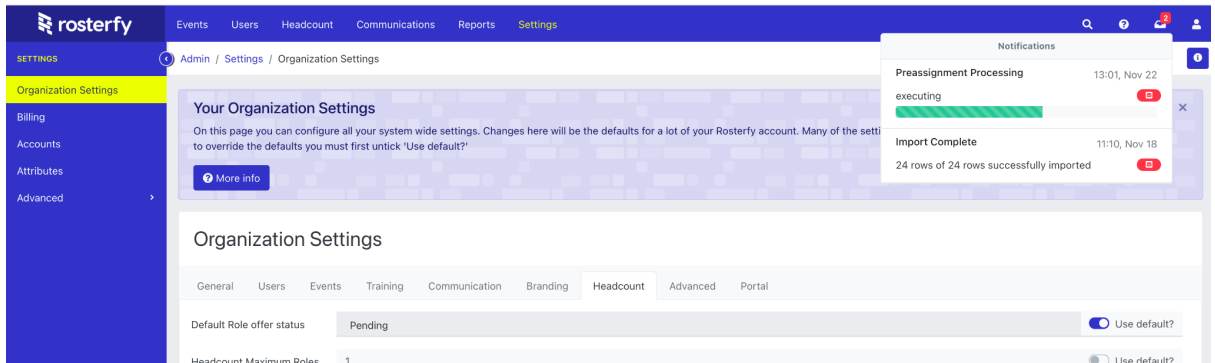
Preassignment Matrix Improvements

There have been 2 improvements to pre-assignment matrix based on feedback from clients;

1. You can configure on role offer to include in the pre assignment process which is important if you have already pre-assigned users to a role



2. Once preassignment has started you will get a system progress bar and confirmation that is has completed



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 settings categories: Organization Settings (highlighted), Billing, Accounts, Attributes, and Advanced. The main content area is titled "Your Organization Settings" and contains a sub-section "Organization Settings" with tabs for General, Users, Events, Training, Communication, Branding, Headcount, Advanced, and Portal. The "Headcount" tab is active, showing a "Default Role offer status" of "Pending" and a "Headcount Maximum Roles" of "1". A "More info" button is visible. A notification pop-up in the top right corner displays two messages: "Preassignment Processing" with a progress bar and "Import Complete" with a confirmation message.

Notifications

- Preassignment Processing** 13:01, Nov 22
executing
[Progress bar: 100%]
- Import Complete** 11:10, Nov 18
24 rows of 24 rows successfully imported

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 are set to "Use default?" to override the defaults you must first untick "Use default?"

[More info](#)

Organization Settings

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

Default Role offer status: Pending ☒ Use default?

Headcount Maximum Roles: 1 ☐ Use default?

Integration

Loqate integration

An integration has been completed with loqate it will show additional address information. Loqate is a platform used for address verification. This will be available in the same Setting > Advanced > Integrations section of your Admin site as all other integrations, please speak to your CS Manager for help in setting it up.