



# Product Release Notes for Rosterfy 2.0

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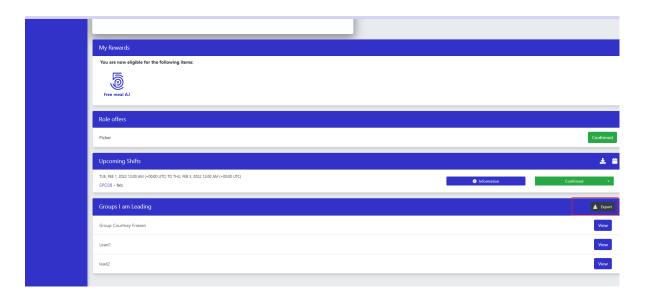
Please note - all employee data you may see is dummy data and not sensitive

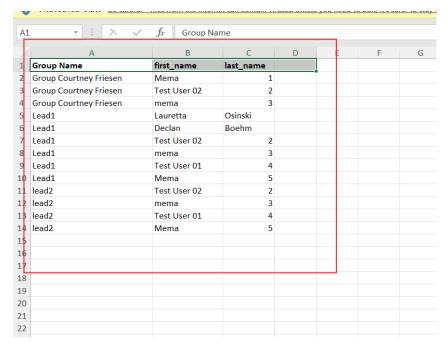
### **General**

# **Group Leaders Able To Export Users**

Staff/Volunteers that are Group Leaders are now able to export a list of users in the groups that they are leading.

This is a new button in the 'groups I am leading' section of the portal. The output is a simple list of first name, last name, and group, as per the screenshot below.



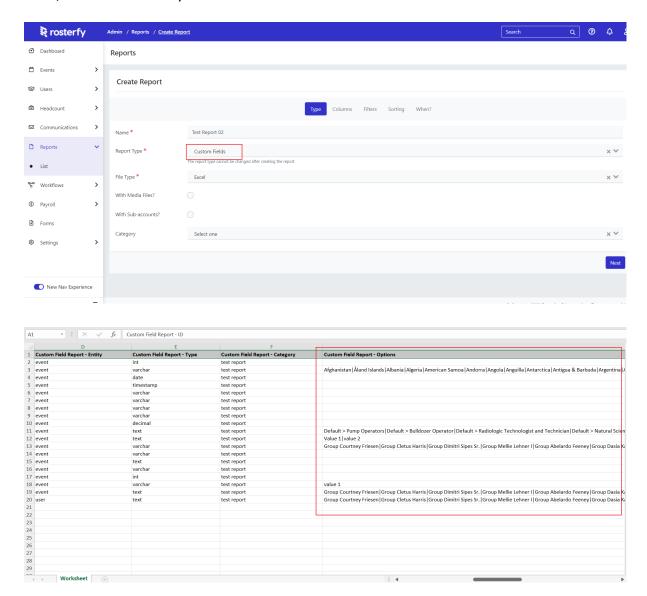




### **New Report Type To Export Custom Fields/Attributes**

A new report type 'custom fields' is now available, where admins are able to extract a report of all custom attributes (i.e. custom fields). All details of these attributes will be extracted, including, where relevant, options fields for drop down fields.

This will help admins have access to and extract a report on an overview of all custom fields/attributes in the system whenever needed.

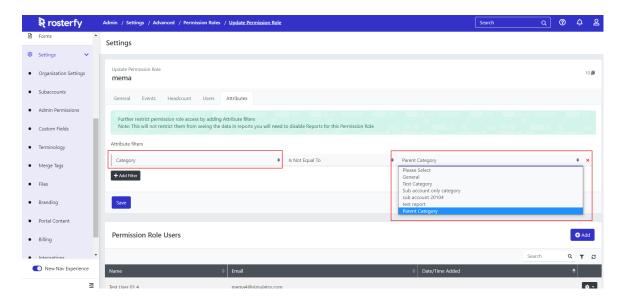




#### Permissions Can Be Set To Filter For Parent Account Attributes

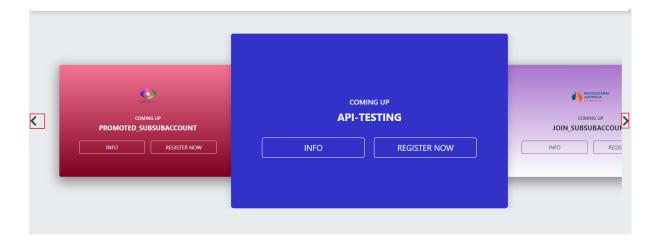
Depending on your Rosterfy setup, you may have a system of accounts and subaccounts - whereby there are some attributes/fields inherited down from the top level account. These attributes can now be filtered on in the subaccounts, by category, as per the screenshot below. This can be found in the existing section on Settings > Admin Permissions > Attributes > Attribute filters.

As you can see in the screenshot below, we can now filter out access to inherited attribute categories, which allows admins greater control over access to sensitive data (i.e. data potentially such as medical history, personal data, etc.).



### **Subaccounts Displayed On Portal In Carousel View**

An improved UI, staff/volunteers will now be able to scroll through an interactive view of your subaccounts via the portal dashboard (if you have included it), using a carousel feature.



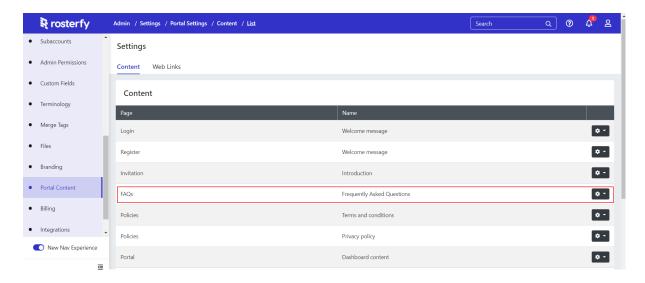


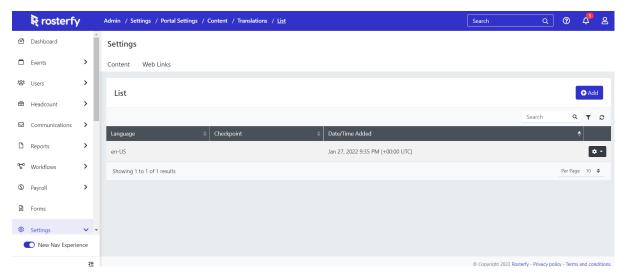
# **FAQs Section Added To Candidate Portal**

Admins are now able to create, customise and set up an 'FAQs' section for their Staff/Volunteers to view from the portal.

This can be found in Settings > Portal Content > FAQs, and can be set up per language.

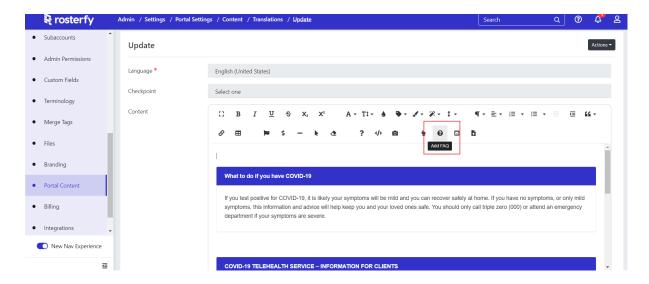
Note: upcoming work is to add a navigation item on the portal for this to be accessible for staff/volunteers.

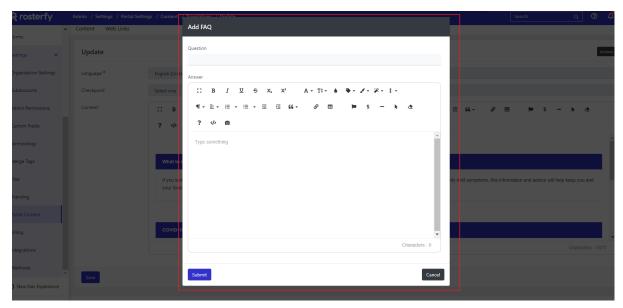




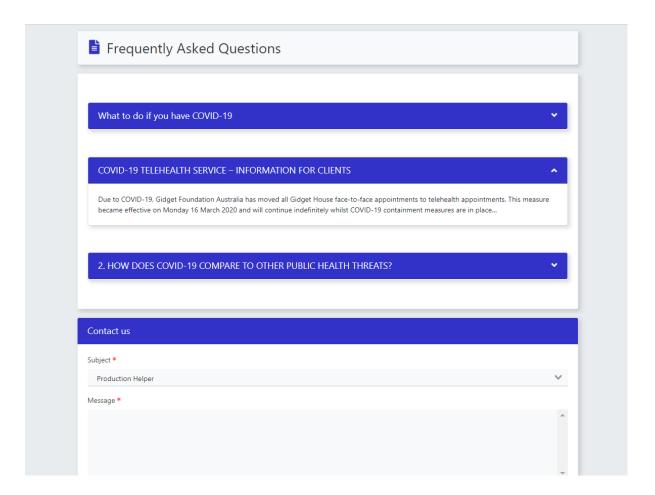


There is a new item on the content section 'add FAQ', where an FAQ-type question and answer block can be added.







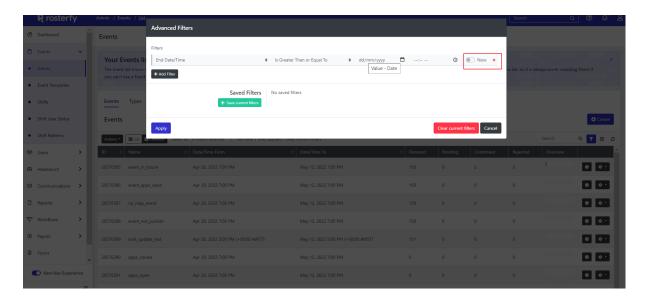


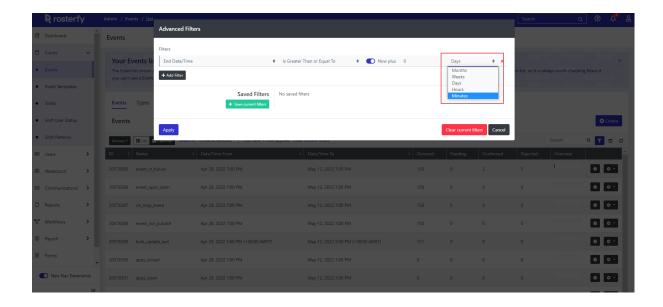


#### 'Now' Filter Available On Dates

Admins are now able to use the 'Now' as a toggle on the right hand side when setting up advanced filters.

This will then change to show 'Now plus' when toggled on, so that the filter can take now (i.e. the current time as of when you have opened or refreshed the page) against a time frame that you set. This means it is far easier for admins to see 'Now plus 3 days' for example, rather than setting up date filters each time, which is tedious to update every day.







#### **Entitlement Cancellation**

Building upon recent updates to our Rewards module (in entitlements and redemption), admins will now automatically see entitlements be withdrawn. This generally will happen when a staff/volunteer withdraws from a shift (or they are removed by an admin).

For example in the use case - that an entitlement has been set up; every 6 hours volunteers are confirmed on in a calendar day, they are entitled to 1 meal voucher. As per our cancellation updates;

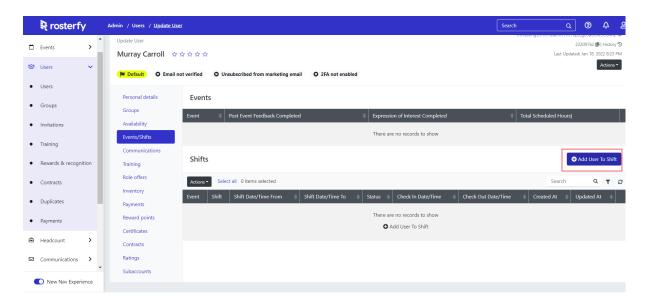
- Jane has a 6 hour shift tomorrow, so therefore she sees on her Rosterfy volunteer portal she has 1 meal voucher that she can use
- Jane unfortunately is sick, so needs to withdraw from her shift. She does this via the Rosterfy Portal
- Rosterfy will recognise that Jane has withdrawn from this shift, therefore is working 0 hours tomorrow, and therefore will take away her meal voucher
- Jane then will no longer see a meal voucher on her portal as available to be redeemed

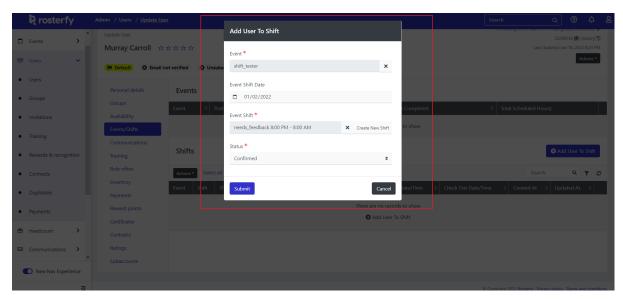


# **Events & Shifts**

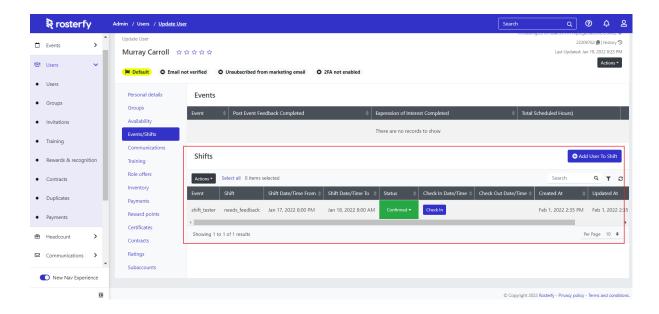
#### Shortcut 'Add To Shift' From User Profile

Admins are now able to add users directly to shifts from the user profile view. This will provide greater flexibility and control when creating shifts, without needing to go into the Events/Shifts module separately, saving time.









### **Auto Rostering Tolerance**

Admins are now able to add a 'tolerance' to their account's auto rostering actions. This means clashes (based on your tolerance set) will be allowed, both before and after shifts.

The setting can be found in Organisation Settings > Events > Auto Rostering Tolerance. This will default to 0 but can be updated.

As per the example below, we have set the tolerance value to 30. This means that shifts start and end times may overlap by 30 mins. So for example Sarah, with this tolerance set, may have a two shifts on today:

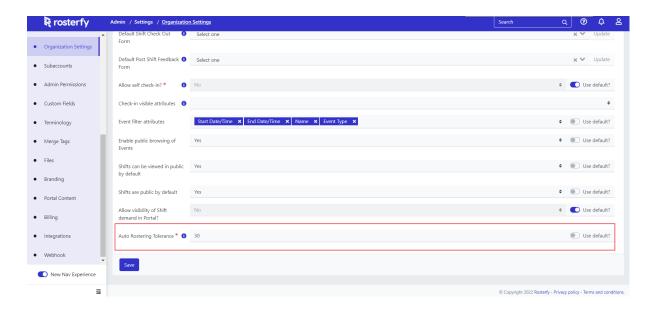
- SHIFT A: Starts 9:00am, finishes 1.30pm
- SHIFT B: Starts 1.00pm, finishes 5.00pm

Shifts A and B overlap by a 30 minute period as you can see above (1.00 - 1.30pm), however with our tolerance this is allowed.

This will allow organisations to have greater flexibility around their auto rostering, particularly where shifts are not needed to be very strict, so a greater number of shifts will be able to be filled.

Please reach out to your Rosterfy CSM for further assistance setting this up.







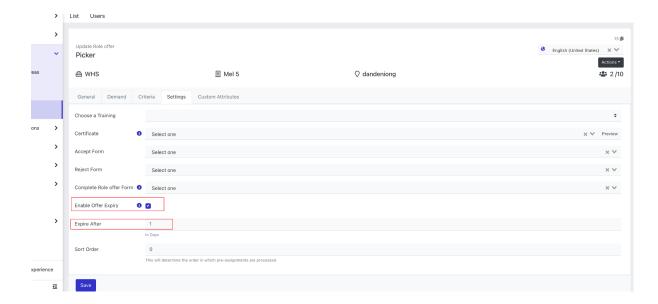


# **Headcount**

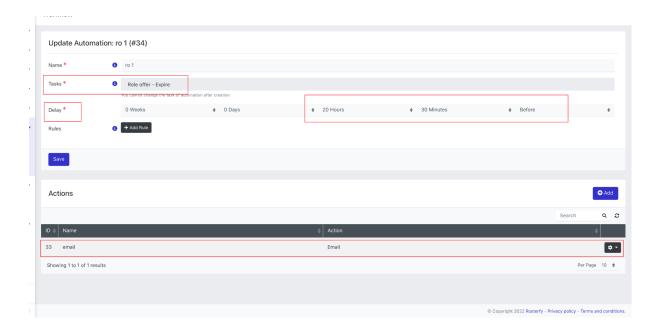
### **New Automation Trigger; Role Offer Expiry**

Admins are now able to create automations off a new trigger; role offer expiry. This can be set up as per the steps below;

- First, the role offer itself must have 'enable offer expiry' ticked. This can be found in the Role Offer > Settings > Enable Offer Expiry (see screenshot below)
- An 'expire after' value needs to be set. This will mean the role offer will expire X days (i.e. multiples of 24 hours) after the offer is sent
- You will see a new automation trigger available within Automations, 'Role offer Expire' (see screenshot below). This can be used now to send notifications or
  perform actions, as per other automations.







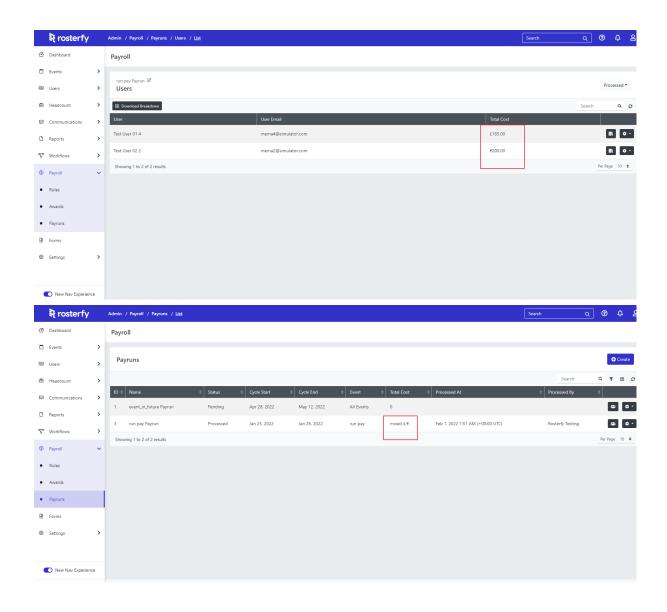


# **Payroll**

### **Multiple Currency Payruns Represented In List**

Admins are now able to see multiple currencies represented in the user listing page when you process pay. The total cost will also be shown as 'mixed' rather than any net figure (which is not possible when you have multiple currencies).

This will help admins understand more clearly when there is payrun with staff that span multiple currencies.





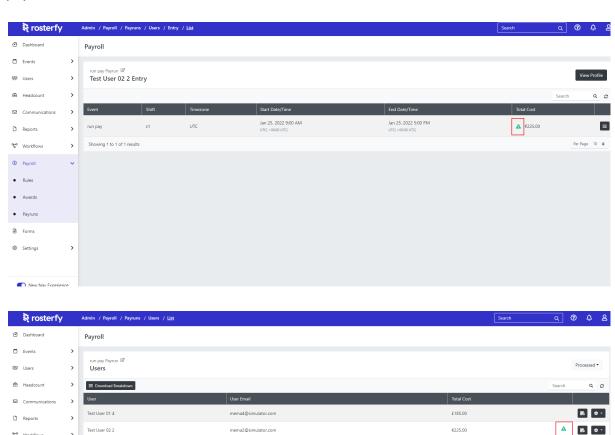
# **Payruns Adjustments Are Shown With Icon**

Showing 1 to 2 of 2 results

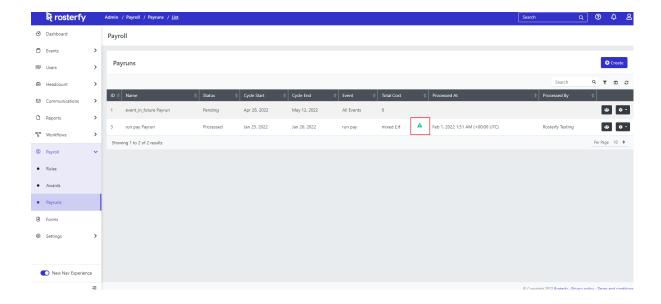
• Rules

Admins are now able to see within our payruns pages wherever a manual adjustment has been made. This is denoted with a small icon as per the screenshots below.

This will help admins easily track and review where manual adjustments have been made to payruns.







### **Payruns Events Permissions Access Reflected**

Payruns are now reflecting admin permissions, particularly those that affect access (or lack of access) to particular events. If an admin user has access to payroll but not access to specific events, they will now not be able to create, access, update, etc. payruns against these events.

This will help admins control more accurately payroll and payruns, particularly where certain admin users having restricted access.

