

Product Release Notes for Rosterfy 2.0

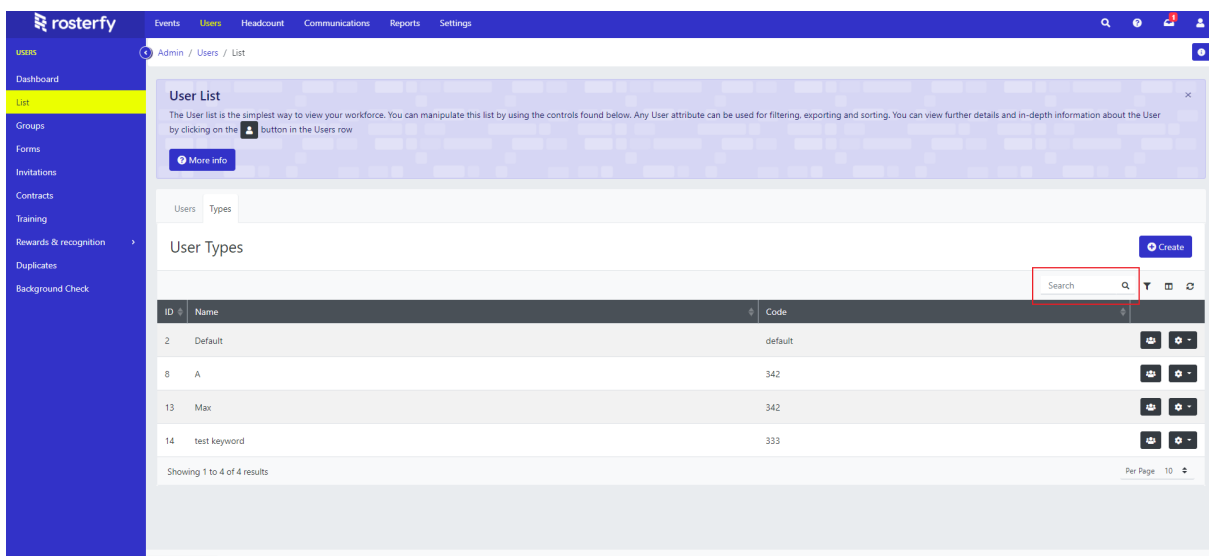
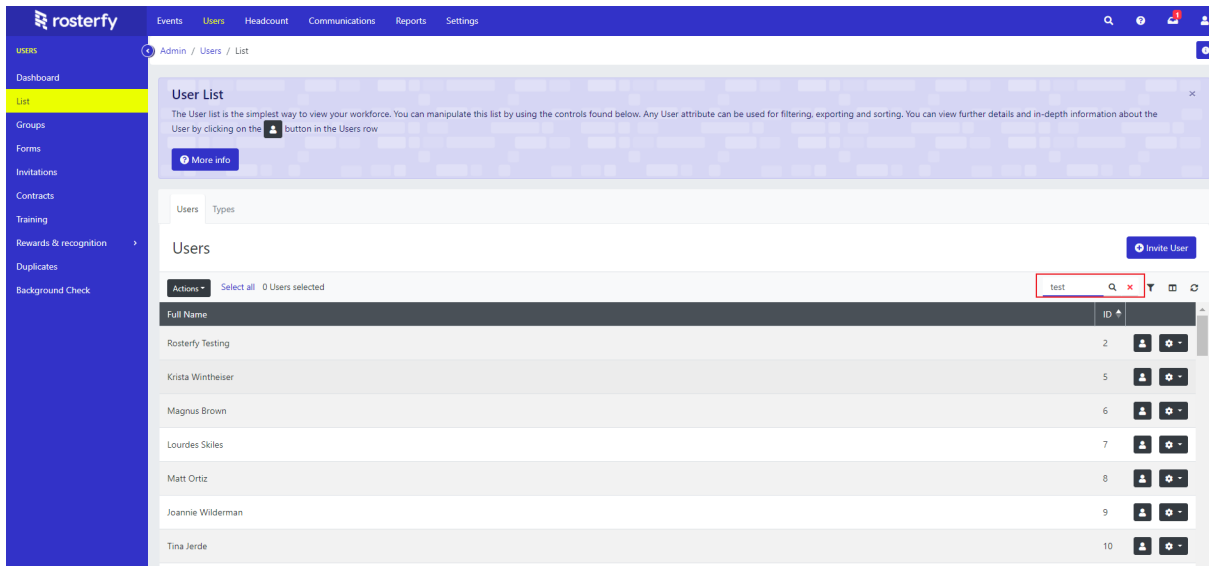
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Please note - all employee data you may see is dummy data and not sensitive

General

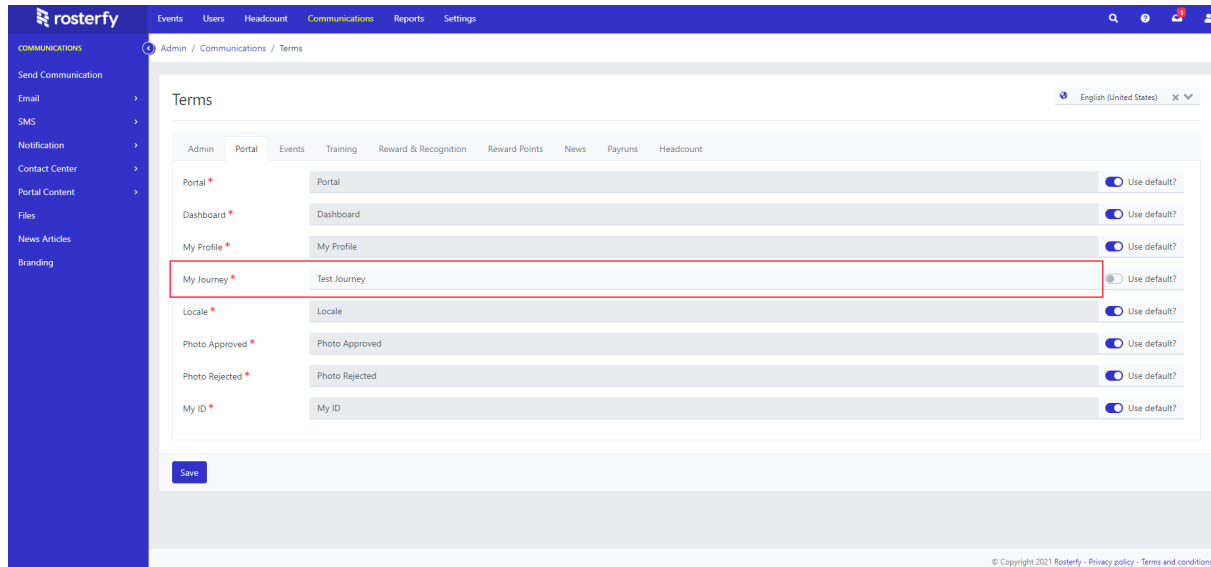
Searching Across Tabs Improvements

A small fix, previously the search bar on a page would retain the same search across multiple tabs. This is no longer the case, as you can see in the screenshots below where we move from User List to User Types.



New Term Available for Checkpoints - 'My Journey'

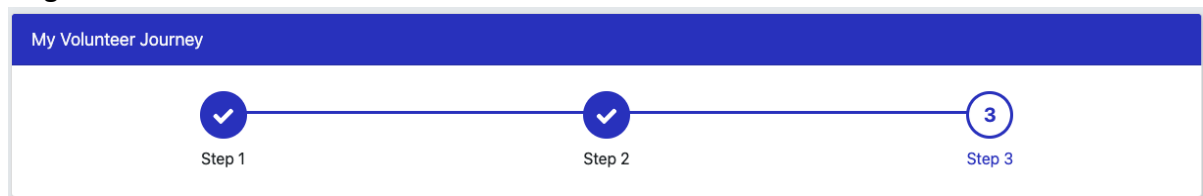
Following a recent release where Admins are able to set up 'My Journey' visualisations of Checkpoint Types in the Candidate portal, we have a small addition; Admins are now able to customise the term 'My Journey' to whatever other suitable term works.



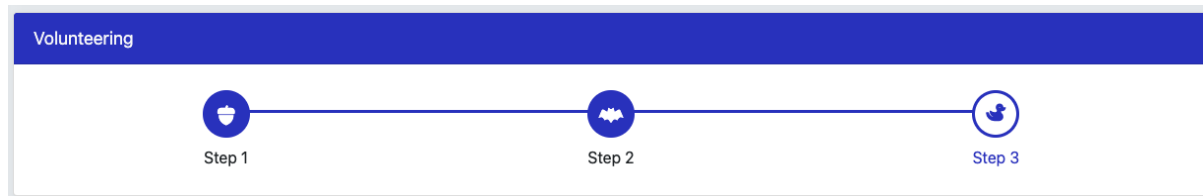
Icons available for 'My Journey'

It is now possible to add icons to your volunteer journey pathway. You can use any icons found from our icon supplier at ['Font Awesome'](https://fontawesome.com/)

Original Icons



Custom Icons



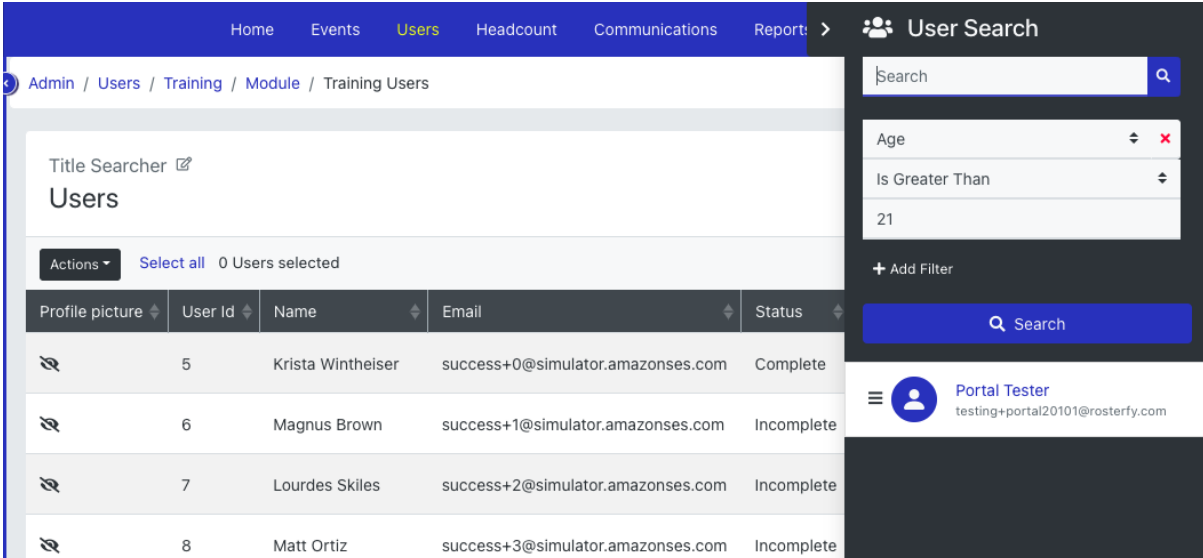
Ask your Rostery account manager today how to add new icons

Enhanced Method to Add users to modules

We have added a new way to add users to different parts of the system so you can make more refined searches for the best candidates. On the following modules, when you try and add a user, you will now be taken to a sidebar

- Training-User
- Group-User
- Inventory-User
- RoleOffer-User
- Shift-User
- Communications Recipients

You can either search with keywords like email address and name, or perform any filters that you would usually use in your listings



The screenshot displays the 'User Search' interface. The main content area includes a breadcrumb trail: Admin / Users / Training / Module / Training Users. Below this is a 'Title Searcher' for 'Users'. An 'Actions' menu shows 'Select all' and '0 Users selected'. A table lists users with columns for Profile picture, User Id, Name, Email, and Status.

Profile picture	User Id	Name	Email	Status
	5	Krista Wintheiser	success+0@simulator.amazonses.com	Complete
	6	Magnus Brown	success+1@simulator.amazonses.com	Incomplete
	7	Lourdes Skiles	success+2@simulator.amazonses.com	Incomplete
	8	Matt Ortiz	success+3@simulator.amazonses.com	Incomplete

The sidebar on the right features a search bar, an 'Age' filter set to 'Is Greater Than 21', and a user profile for 'Portal Tester' with the email testing+portal20101@rosterfy.com.

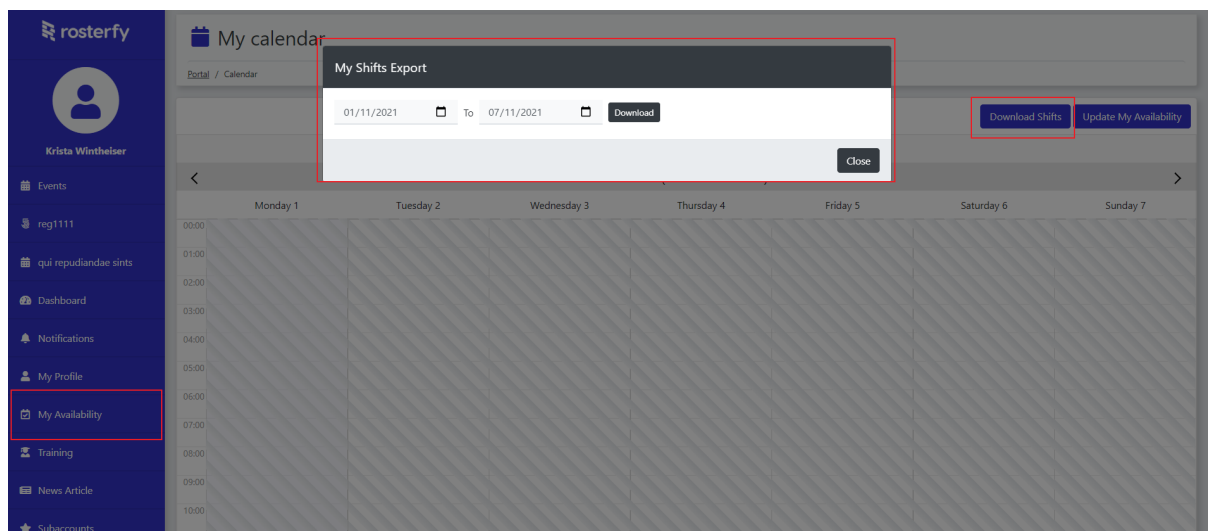
Events & Shifts

Shift Type Filter Available on Candidate Portal

Based on feedback, we have now added a Shift Type Filter on the Candidate Portal. This means that Volunteers/Staff are now more easily able to filter via Shift Type to more easily see and access the Shifts they're interested in.

Download PDF of Shifts

Volunteers/Staff are now able to download a PDF for printing or other purposes. This can be found in My Availability > My Calendar view, under the 'Download Shifts' button. This will extract a PDF view of your calendar-view-week.



Import Events and Shifts with Settings

Admins are now able to Import both Events and Shifts with both Settings selected. This will significantly increase the ease and speed of mass importing Events and/or Shifts!

The following settings are now importable:

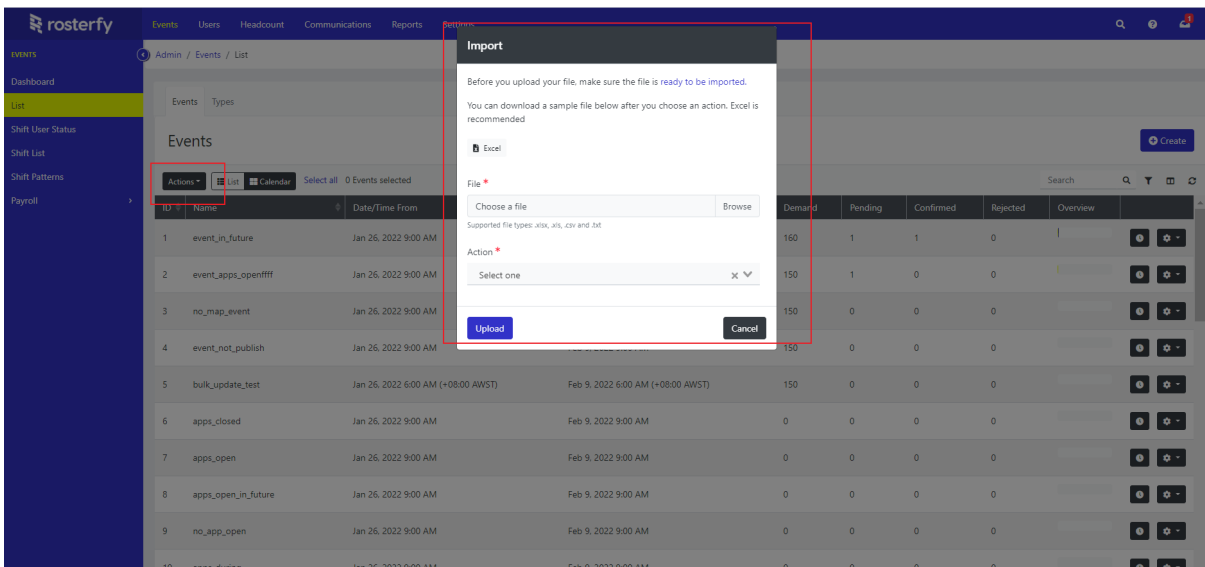
Event:

- Allow Self Check-In
- Self Check-In opens before Shift starts
- Self Check-In closes after Shift starts
- Self Check-Out closes after :shift ends
- Self Check-In proximity to shift location
- Pre-Check-In opens before :shift starts
- Default Shift Application Form
- Default Shift Pre-Check-In Form
- Default Shift Check-In Form
- Default Shift Attended Form
- Default Shift Check-Out Form
- Default Post Shift Feedback Form

Shift:

- Link Role Offer
- Use Role Offer address
- Allow self check-in
- Self Check-In opens before Shift starts
- Self Check-In closes after Shift starts
- Self Check-Out closes after :shift ends
- Self Check-In proximity to shift location
- Pre-Check-In opens before :shift starts
- Shift Application Form
- Shift Pre-Check-In Form
- Shift Check-In Form
- Shift Attended Form
- Shift Check-Out Form
- Post Shift Feedback Form

Video: <https://www.loom.com/share/1717814e4f7b4c88b0e2b303e81d4ba5>



The screenshot shows the Rosterfy web application interface. The 'Events' table is visible in the background, and an 'Import' dialog box is open in the foreground. The dialog box contains the following text and elements:

Import

Before you upload your file, make sure the file is ready to be imported.

You can download a sample file below after you choose an action. Excel is recommended.

Excel

File *

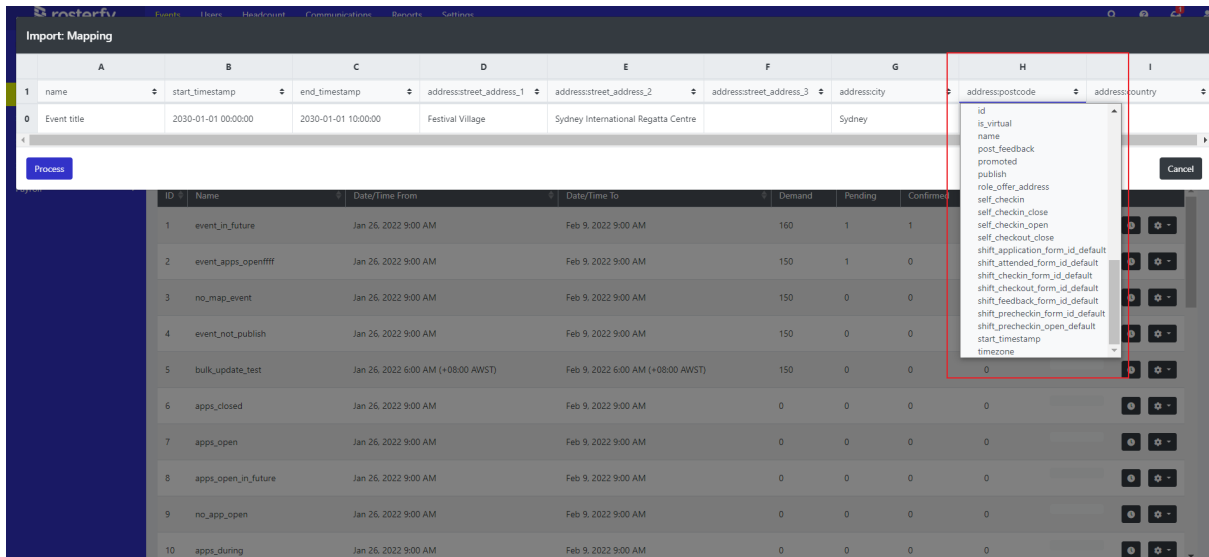
Choose a file

Supported file types: .xlsx, .xls, .csv and .txt

Action *

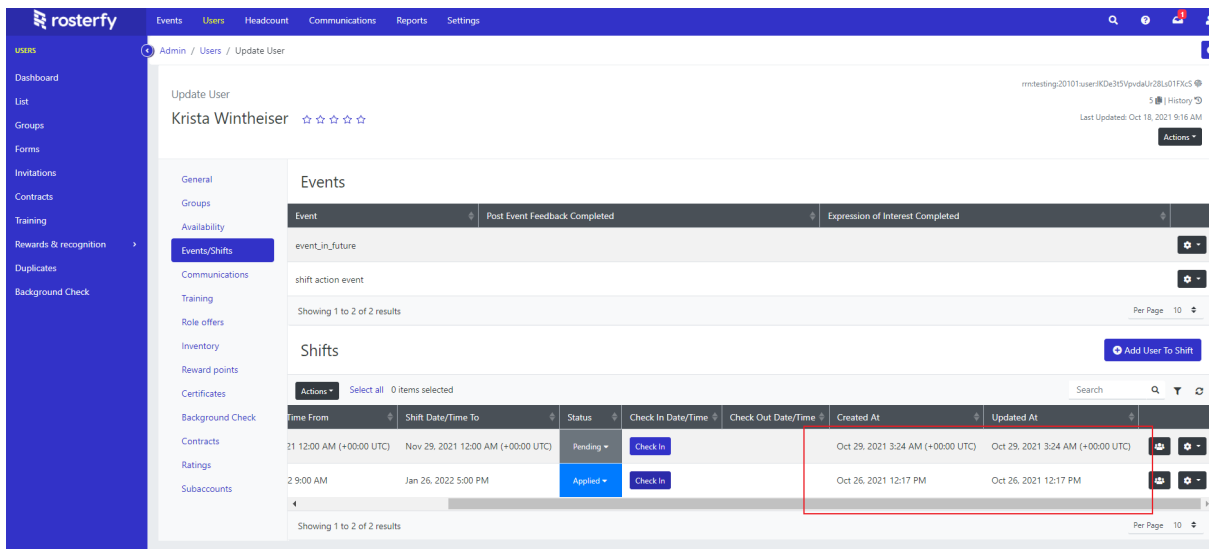
Select one

The background table has the following columns: ID, Name, Date/Time From, Demand, Pending, Confirmed, Rejected, Overview. The table contains 10 rows of event data.



Shift Timezones will be displayed in Shift-Local-Timezone

A small update, where Shifts appear in User Profiles and have time-stamps, these will display the Shift-specific-local-time and also the timezone (if this differs to the Admin’s timezone). This enables a more accurate reading for Admins of a Volunteer/Staff’s shift working times (i.e. it may be in a different timezone, but it was 9am-5pm for them, which is far easier to understand).



Total Hours Scheduled Per Event

It is now possible to report and view per event the number of hours that a user has been scheduled for. You can view this on both the event-user list and on the users profile page

dfc

Users

Actions ▾ **Select all** 0 Users selected

User ID	Name	Total Scheduled Hours	
295	pardip 5	96	
296	pardip 6	96	
297	pardip 7	96	
298	pardip 8	96	
299	pardip 9	96	

User Type Setting - maximum hours per day

You can now add more detailed restrictions by user type to both hours a user can be scheduled per day and per week. When you combine this with the minimum gap between shifts, you get quite flexible options to schedule your workforce.

Update Type 2

Default

General Branding Headcount **Events**

Maximum amount of hours Users can work in a week *

8 Per Day

40 Per Week

[+ Add](#)

Gap between Shifts in minutes * 6

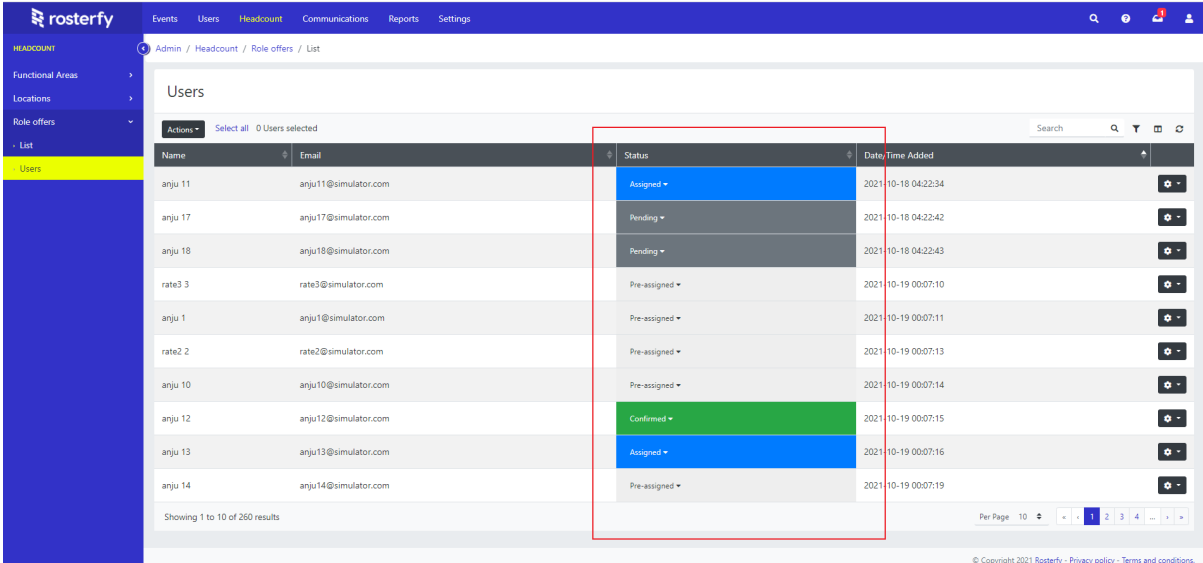
Negative for overlapping

Headcount

Dropdown Status Change for Role Offer User List

Admins will now be able to quickly change the Status of a User's Role Offer, as per the screenshots below, off the Role Offer User List view. This will enable an easier and faster way of updating Role Offer Statuses.

Video: <https://www.loom.com/share/e575b7b2d8a1472993c30a13bbf28404>




Name	Email	Status	Date/Time Added
anju 11	anju11@simulator.com	Assigned	2021-10-18 04:22:34
anju 17	anju17@simulator.com	Pending	2021-10-18 04:22:42
anju 18	anju18@simulator.com	Pending	2021-10-18 04:22:43
rate3 3	rate3@simulator.com	Pre-assigned	2021-10-19 00:07:10
anju 1	anju1@simulator.com	Pre-assigned	2021-10-19 00:07:11
rate2 2	rate2@simulator.com	Pre-assigned	2021-10-19 00:07:13
anju 10	anju10@simulator.com	Pre-assigned	2021-10-19 00:07:14
anju 12	anju12@simulator.com	Confirmed	2021-10-19 00:07:15
anju 13	anju13@simulator.com	Assigned	2021-10-19 00:07:16
anju 14	anju14@simulator.com	Pre-assigned	2021-10-19 00:07:19

Training

Completed All Training as a filter

There is now a filter available to filter by 'Completed all training'. This can then be used as an automation rule, so when training is complete, you can check ALL training is complete before moving someone to a new action



Filters

Completed All Assigned Training

Is Equal To Yes

+ Add Filter