

Product Release Notes for Rosterfy 2.0

General	2
Searching Across Tabs Improvements	2
New Term Available for Checkpoints - 'My Journey'	3
Events & Shifts	4
Shift Type Filter Available on Candidate Portal	4
Download PDF of Shifts	4
Import Events and Shifts with Settings	4
Shift Timezones will be displayed in Shift-Local-Timezone	6
Headcount	6
Dropdown Status Change for Role Offer User List	7
Training	7
Completed all Training as a Filter	7



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.



rosterfy	Events Users Headcount Communications Reports Settings		Q 0 🛃
	O Admin / Users / List		
oard			
	User List The User list is the simplest way to view your workforce. You can manipulate this list by using the controls found below.		
	by clicking on the simplest way to view your workforce. You can manipulate this list by using the controls found below.	Any user attribute can be used for nitering, exporting and sorting, rou can view	viurther details and in-depth information about the User
	More info		
cts	Users Types		
	Vulser Types		Creat
ates			Search Q T 🖬
round Check	ID 🔶 Name	Code	
			· · · · · · · · · · · · · · · · · · ·
	2 Default	default	
	8 A	342	عه (a
	13 Max	342	
	14 test keyword	333	a
	Showing 1 to 4 of 4 results		Per Page 10



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.

😫 rosterfy	Eve	ents Users H	Headcount	Communications	Reports	Settings										ຊ 🔮	
MMUNICATIONS	() Ac	dmin / Communicat	tions / Terms														
nd Communication																	
nail	•	Terms												•	Binglish (United State	s) X V
IS	•																
	•	Admin Por	rtal Events	Training	Reward & Rec	ognition:	Reward Poin	nts News	Payruns	Headcount							
	> >	Portal *		Portal												🔿 Use de	efault?
rai Content	<u></u>	Dashboard *		Dashboard												🔿 Use de	efault?
- ws Articles				My Profile												Use de	
nding		My Profile *		My Profile													
		My Journey *		Test Journey											(🗩 Use de	efault?
		Locale *		Locale											•	O Use de	efault?
		Photo Approved	*	Photo Approved	ł										•	🖸 Use de	efault?
		Photo Rejected *	•	Photo Rejected												🖸 Use de	efault?
		My ID *		My ID											•	Use de	efault?
		Save															
		June															
													00	opyright 2021 Ro	sterfy - Privacy	policy - Ter	ms and co

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 '<u>Font Awesome</u>'

Original Icons

My Volunteer Journey			
Step 1	Step 2	3 Step 3	

Custom Icons

Volunteering			
Step 1	Step 2	Step 3	

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

		Hon	ne Events	Users	Headcount	Communications	Report: >	> i	😕 Use	r Search		
9	Admin / Users / T	raining / M	odule / Training	Users					Search			۹
								T	Age		¢	×
	Title Searcher	ľ							Is Greater	Than		÷
	Users								21			
	Actions - Sele	ct all 0 Use	rs selected						+ Add Filte	r		
	Profile picture	User Id	Name		Email	\$	Status	¢		Q Search		
	Ø	5	Krista Wintheis	er s	success+0@simul	ator.amazonses.com	Complete			Dantal Tastan		
	ø	6	Magnus Brown	s	success+1@simula	ator.amazonses.com	Incomplet	te	=	Portal Tester testing+portal20101@r	osterfy.c	om
	Ø	7	Lourdes Skiles	S	success+2@simul	ator.amazonses.com	Incomplet	te				
	8	8	Matt Ortiz	s	success+3@simul	ator.amazonses.com	Incomplet	te				



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.

😫 rosterfy	苗 My calenda	ř					
	Portal / Calendar	My Shifts Export					
8		01/11/2021 🗖 To	07/11/2021	Download		Download Shift	s Update My Availability
Krista Wintheiser					Close		
🗰 Events	< l						>
👼 reg1111	Monday 1	Tuesday 2	Wednesday 3	Thursday 4	Friday 5	Saturday 6	Sunday 7
🛱 qui repudiandae sints							
Dashboard							
Notifications							
💄 My Profile							
🖄 My Availability							
🖀 Training							
 News Article 							
🚖 Subaccounts	11.00						

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:

09 November 2021

R rosterfy

- 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

<u>Shift:</u>

- 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

😫 rosterfy											
	Admin / Events / List	Import	t								
lashboard ist	Events Types	· · · · · · · · · · · · · · · · · · ·	ou upload your file, make sure the file is ready to be i download a sample file below after you choose an ac evolution								
	Events	D Exce								00	Create
	Actions - 📰 List 📰 Calendar Se	elect all 0 Events selected File *							Search	Q T	• •
	Name	Date/Time From Choos		Browse	Demard	Pending	Confirmed	Rejected	Overview		
	1 event_in_future	Jan 26, 2022 9:00 AM Action *	r file types: xisx, xis, xsv and Jut		160	1	1	0			0 -
	2 event_apps_openffff	Jan 26, 2022 9:00 AM Selec	t one	××	150	1	0	0			a -
	3 no_map_event	Jan 26, 2022 9:00 AM	4	Cancel	150	0	0	0			0 - 0
	4 event_not_publish	Jan 26, 2022 9:00 AM	· · · · · · · · · · · · · · · · · · ·	Cunter	150	0	0	0			• •
	5 bulk_update_test	Jan 26, 2022 6:00 AM (+08:00 AWST)	Feb 9, 2022 6:00 AM (+08:00 AWST)		150	0	0	0			¢ -
	6 apps_closed	Jan 26, 2022 9:00 AM	Feb 9, 2022 9:00 AM		0	0	0	0			0 - 0
	7 apps_open	Jan 26, 2022 9:00 AM	Feb 9, 2022 9:00 AM		0	0	0	0		•	0 *
	8 apps_open_in_future	Jan 26, 2022 9:00 AM	Feb 9, 2022 9:00 AM		0	0	0	0			0 ·
	9 no_app_open	Jan 26, 2022 9:00 AM	Feb 9, 2022 9:00 AM		0	0	0	0			¢ -
	10 apps_during	Jan 26, 2022 9:00 AM	Feb 9, 2022 9:00 AM		0	0	0	0			\$ -

R rosterfy

© roctorfy nport: Mapping											
A		В	с	D	E	F		G	н		1
name	¢	start_timestamp 🗘	end_timestamp \$	address:street_address_1 🗢	address:street_address_2 \$	address:street_address_3 💲	address:city		address:postcode	¢ addr	ess:country
Event title		2030-01-01 00:00:00	2030-01-01 10:00:00	Festival Village	Sydney International Regatta Centre		Sydney		id is_virtual name		^
Process									post_feedback promoted publish role_offer_address		G
		D Name event_in_future	Date/Time From Jan 26, 2022 9:01		Date/Time To Feb 9, 2022 9:00 AM	¢ Demand	Pending 1	Confirme 1	ed self_checkin self_checkin_close self_checkin_open self_checkout_close		0 0-
	ā	2 event_apps_openffff	Jan 26, 2022 9:01	D AM	Feb 9, 2022 9:00 AM	150	1	0	shift_application_fo shift_attended_form shift_checkin_form_	_id_default id_default	• •
	3	3 no_map_event	Jan 26. 2022 9:0) AM	Feb 9. 2022 9:00 AM	150	0	0	shift_checkout_form shift_feedback_form shift_precheckin_fo	_id_default m_id_default	• •
	4	4 event_not_publish	Jan 26, 2022 9:01	D AM	Feb 9, 2022 9:00 AM	150	0	0	shift_precheckin_op start_timestamp timezone	en_default	•
	9	5 bulk_update_test	Jan 26, 2022 6:0	0 AM (+08:00 AWST)	Feb 9, 2022 6:00 AM (+08:00 AWST)	150	0	0			
	6	5 apps_closed	Jan 26, 2022 9:0) AM	Feb 9, 2022 9:00 AM	0	0	0	0		0 0
	3	7 apps_open	Jan 26, 2022 9:0	D AM	Feb 9, 2022 9:00 AM	0	0	0	0		0 0
	8	3 apps_open_in_future	Jan 26, 2022 9:0	D AM	Feb 9, 2022 9:00 AM	0	0	0	0		0 0
	ŝ	9 no_app_open	Jan 26, 2022 9:0	D AM	Feb 9. 2022 9:00 AM	0	0	0	0		0 0
	1	10 apps_during	Jan 26, 2022 9:01	D AM	Feb 9, 2022 9:00 AM	0	0	0	0		0 0

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).

R rosterfy	Events Users Heado	ount Communications	Reports Settings					ч.	g 🛃
RS	Admin / Users / Update U	lser							
shboard								rm:testing:20101:user:IKDe3t5\	/pvdaUr28Ls01FX
	Update User								5 🎒 Histo
ups	Krista Winthei	ser ☆☆☆☆☆						Last Updated	Oct 18, 2021 9:1
									Action
ations	General	Events							
racts	Groups	Events							
ng	Availability	Event	Post Event Feed	Iback Completed		¢	Expression of Interest Completed		¢
ds & recognition	> Events/Shifts	event_in_future							- 1
ates	Communications	shift action event							
round Check	Training								
	Role offers	Showing 1 to 2 of 2 resu	Its						Per Page 10
	Inventory	Shifts						0	Add User To Si
	Reward points	Shires							
	Certificates	Actions * Select all	0 items selected					Search	۹ 🕇
	Background Check	Time From 🗧	Shift Date/Time To	Status 🔶 Che	eck In Date/Time 🗘	Check Out Date/Time	Created At	Updated At	¢
	Contracts	21 12:00 AM (+00:00 UTC)	Nov 29, 2021 12:00 AM (+00:00 UT	;) Pending - Ch	heck In		Oct 29, 2021 3:24 AM (+00:00 UTC)	Oct 29, 2021 3:24 AM (+00:00 UTC	
	Ratings				_				
	Subaccounts	2 9:00 AM	Jan 26, 2022 5:00 PM	Applied - Ch	heck In		Oct 26, 2021 12:17 PM	Oct 26, 2021 12:17 PM	*
		4							Per Page 10

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

R rosterfy

_{dfc}				
Actions -	Select all 0 Users selected		Search	९ र 🗉 😂
User ID	🔷 Name 🔶	Total Scheduled Hours	\$	
295	pardip 5	96		1 ¢~
296	pardip 6	96		* • -
297	pardip 7	96		1 ¢ -
298	pardip 8	96		1 • -
299	pardip 9	96		1 0 ·

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 Default			2 🏨
General Branding H	eadcount Events		
Maximum amount of hours Users can work in a week *	8	Per Day	\$ ×
	40	Per Week	\$ ×
	+ Add		
Gap between Shifts in () minutes *			
minutes	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

R rosterfy	Events Users H	leadcount Communications Reports Settings			م 🛛 🕹
EADCOUNT	Admin / Headcount ,	/ Role offers / List			
unctional Areas >	Licore				
ole offers 🗸 🗸	Actions - Select a	II 0 Users selected			Search Q T D 2
List	Name	🔶 Email	♦ Status	Dater Time Added	÷
Users	anju 11	anju11@simulator.com	Assigned +	2021-10-18 04:22:34	0 *
	anju 17	anju17@simulator.com	Pending +	2021-10-18 04:22:42	0 -
	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	¢ -
	Showing 1 to 10 of 2	60 results		Per Page 10	
					1 Rosterfy - Privacy policy - Terms and conditi

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

lters		
Completed All Assigned Training		
Is Equal To	\$ Yes	\$