



User Guide: New Features & Changes in v2025.1.0

1. New Features

1.1. Changes to Current Version & Recommended Actions

This update does not significantly change existing functionality. However, it includes some minor improvements, which you may wish to inform your management team about and, in particular, monitor any manipulation rules you currently have.

List of key functions affected by this update:

- **This update changes the system's approach to absences and holiday calculations where it will now automatically update holiday and absence deductions within the system to match the applicable contract settings.**
This will mean much less or no manual adjustments to holiday are needed. Changes to deductions on contracts will automatically update the affected absences and holiday. Additional national or organisation holidays will automatically be updated as set.
- This should not impact any of your existing processes but should ensure the expected outcomes with holidays and absences, particularly when late or retrospective changes are made.

1.2. Headline New Features:

Below is a brief introduction to this update's New Features. The guide further details these features later in this document.

- **Pay Scales**

This update adds a new feature called pay scales to the system. Users can now set different pay scales and define codes/point values for each range of salary/hourly rates. This information is displayed on profiles under the Training & Skills tab.

To use: Ensure Pay Scales have been enabled under Global Settings > Features. See our detailed guide below on how to use and create pay scales in our [in detail](#) section.

- **Absences**

Many improvements have been made to the absence of features.

- Multiple absence types are now supported per day.
To use: Go to a staff member's profile and click to report an absence. Ensure the two different types of absence do not overlap.
- Automatic recalculation of absences when changing contract settings or staff contract history.
- Automatic recalculation of absences when changing an absence policy.
- Part-day absences no longer need a policy to calculate the 'less than full-day' duration.

- **Holiday**

The new update has added new features to Holiday.

- Automatic recalculation of holiday usage when removing an organisation holiday.
- Automatic recalculation of holiday when changing contract settings or staff contract history.

- **Recruitment Add On**

Additions have been made to the recruitment add-on for adding additional details for successful applicants.

- Recruitment Add-On now allows the assignment of jobs to positions and when making an offer for positions. There are also other options to consider, including whether or not jobs can be changed by those making hiring decisions.
- Under the Recruitment Add-On, hiring managers can now assign new positions to a specific squad under the skills tab, allowing them to organise their team structure as early as the recruitment process.
To use: Go to Recruitment > Manage Positions > Create New Position. When creating a new position, go to the successful applicants tab. There is now a section under the heading 'Jobs'. From here, you can assign them to a specific job immediately and set other details. Under the Squads section, you can set the squad the successful applicant will be in for this role.
- There is also now the option to create new staff with accounts but not automatically grant them access to their accounts.
To use: When offering a position under the Create/update StaffSavvy Account option, you will see

the option not automatically to grant access to their account.

- **Available Shifts**

Many improvements have been made to Available Shifts to assist staff with a faster, easier experience.

- Staff can now offer and take shifts on the details page of a shift, which makes the process much easier when you are interested in the details of the shift.

To use: This feature is only available when using the StaffSavvy app. Under shift details, you can select the Take Shift option.

- There is a new option to 'hide' a shift if you are not interested; this keeps the available shifts list smaller and allows staff to see the shifts they might be interested in. You can also immediately hide shifts in the app.

To use: Go to Shifts > Available Shifts. Under the list of shifts available to staff, a new thumbs-down button next to 'offer shifts' allows you to ignore shifts. Then, in the actions menu, you can hide all ignored shifts.

- Under available shifts, the system now defaults to only showing the first 25 available shifts with an option to view more. Again, to help keep the available shifts page more concise, making the page more legible and user-friendly.

To use: Go to > Shifts Available Shifts. If there are more than available shifts that have different times or require different skills, the View More button will appear at the bottom of the page.

- Available shifts now involve additional shift-level caching to increase speed when releasing large rotas.

To use: Automatically Applied.

- **Shift Week**

Several improvements were made to Shift Week before its overhaul and redesign coming this spring.

- All staff can access a new view-only version of the week view, which allows them to see schedules easily but does not allow them to make changes or adjustments.

To use: You must first enable the permission so that staff can see the week view option. Go to System > Levels & Permissions > Manage Permissions > Choose the View Full Shift Schedules permission and enable all staff you want to access this feature. Once permissions are enabled, staff can find them under Shifts > Venue Shifts Schedule.

- You can now choose the format in which the hours figure on the left of the screen (under the staff member's name) is shown. The options include a staff member's planned paid hours, planned working hours, planned contracted hours, scheduled hours, or current actual contracted hours.

To use: Go to the settings tab in the actions bar under week view. Under weekly hours, you will see several options for viewing hours.

1.3. Additional Improvements

- **Assign contract documents when increasing salary**

You can now assign contract documents when increasing a staff member's salary. This is on the same page now, making it easier to make changes quickly.

To use: Go to a staff member's profile, then in the actions bar, select Edit Details > My Contracts in the actions bar. A button on the right-hand side allows you to assign documents to the contract.

- **Prefer not to work option**

Availability preferences now support two options: unavailable and prefer not to work. This allows you to see in more detail who can and would prefer not to work certain days or times. It also allows managers to differentiate between times staff absolutely can't work, and times they can work if needed but prefer not to.

To use: Go to My Account > My Availability > Weekly Preferences. You will see the availability calendar. Click on the blocks of time you would prefer not to work twice until each block turns blue.

- **Delay daily emails**

Daily emails can now be delayed until after a specific time by each staff member to suit their schedule. This means staff won't receive a reminder before the time they have set up.

To use: Go to My Account > About Me > My Notifications. Here, you will see a set of options regarding your notifications. Under Reminder Email Delay, choose when you want emails to arrive.

- **Set absence days as exempt from deductions**

A new improvement to Holiday & Absences is the ability to set a day as exempt from deductions, which will not be overridden by the system later. This can be done only after the absence has been submitted.

To use: Go to a staff member's profile > Under the Absences tab, click to review the report. You can then edit the absence and choose the option to make that absence exempt from deductions.

- **Quick report absence under profile**

The quick report absence option is now available in the absence menu at the top of the profile, making it easier to report an absence quickly.

To use: Go to a staff member's profile, click the absences tab, and see the quick report button.

- **Assign shift to "no event"**

Under shift events, when you are directly assigned events, you can now assign a shift to no event. When a shift is added, it will be automatically assigned to any ongoing event based on the shift working times, but you can unassign it when editing. There is also the option to assign it to a specific event.

To use: You must go to the venue you are interested in. In the venue settings under Shift Configuration, under the shift event options, choose to allow manual linking of shifts to events, meaning each shift will be assigned directly to an event. Then, when adding shifts to a day, you can edit the shift and have the option to assign it to No Event.

- **New repeat option for scheduling**

Under the shift scheduler tool, managers can schedule a template to repeat every three weeks.

To use: Go to Shifts > Schedule Creation > Manage Schedule. Under the section Add Template to Schedule, you can repeat the template. From here, there is a drop-down button where you can choose the length of time.

- **ArtifaxEvent arrangement references as a cost code option**

A new option for syncing cost code information has been added to ArtifaxEvent global settings. This option allows you to pull through the arrangement reference to populate the cost codes for the event.

To use: Go to Global Settings > Integrations. Under the ArtifaxEvent heading, you will see the option 'Cost Centre Sync?' From here, select the arrangement reference option.

- **Added Azure Blob storage upload for scheduled reports**

In this update, when scheduling a report, you can upload the export report results to the Blob Storage destination when a snapshot is generated. You must include details here for your export, including the desired file name extension, upload format, and the folder to which you would like the file to be uploaded.

To use: Go to Reports > Manage Custom Reports > Schedule Report. Under the heading Azure Blob Storage Upload, choose to enable the upload.

- **New multiply hours paid option**

There is now an additional x1.18 paid-hour manipulation rule option. This will increase the hourly pay rate without affecting the actual hours worked. So, the pay will be multiplied by 1.18 per hour for every hour.

To use: Go to Pay > Contracts > Manipulation Rules. When creating a new manipulation rule, an option under 'Changes to Make' allows you to 'Multiply Hours Paid By' a specific number. This now includes the option to increase pay by X1.18 for every hour as part of a rule.

- **Touch screen improvements for availability**

Weekly Availability now supports touch devices for touch and drag events. This means that where previously, on the app version of StaffSavvy, you had to tap each date individually, you can now swipe across to select multiple dates you are available/unavailable at once, just like in the browser version.

To use: Automatically updated.

- **Skills will only appear for relevant venues**

Assign Skills will now restrict the list to those skills in the venues for both the staff member and the assignee, so it should show only those skills the assignee is interested in.

To use: Go to Staff > Staff Settings > Staff Skills. Then, choose manage members to add a staff member to that skill. If you are unsure whether a skill is used in a specific venue, you can visit System > Venues > Manage Venues. Choose to edit the venue you are interested in, and under skills, you can choose specific skills for that venue.

- **Easily view staff offering to work available shifts**

Show the list of offered staff on the Cover & Offered Shift list as a tooltip on the offered shifts report.

To use: Go to Reports > Shift Reports > Shift Requests. This will take you to the Cover & Offered shifts page.

Click the assign button to see all the staff that have offered to work that shift.

- **An improved process for hidden recruitment positions**

This update includes an improved process for hidden recruitment positions when staff need to log in. Previously, applicants were unable to view jobs via hidden links if they logged in to an account that had been used to apply for a previous role. In this update, they can log in using the direct link and log in to their active account. They will have access to the roles they have applied to via their hidden links. This will only apply if they log in via the link they received.

To use: This feature only applies if you have chosen to hide the position from the portal when creating a position. This means that it can only be accessed via a direct link. No other actions are necessary and are applied automatically.

- **Block shift scheduling until the contract is signed**

Decide if contract documents should block staff from accepting shifts unless the contract is signed. Alternatively, choose to allow staff access to shifts. This option can be helpful if you need to be able to make changes in salary documents or job descriptions.

To use: Go to Pay > Contracts > Contract Documents. Then, when creating or editing a contract document, you will see the Block Scheduling of Shifts until signed option. Click yes if you want to block the scheduling of shifts until the document is signed.

- **Restriction on editing holidays across multiple holiday periods.**

A new restriction has been added concerning holiday periods across multiple holiday years to prevent edge-case issues from being experienced. This block stops people from editing a holiday that takes it into next year's holiday period. Staff can still request a holiday over two holiday periods, and the system will split it, but staff cannot edit a holiday that has already been approved to go into the following year.

To use: This feature is automatically on and will automatically prevent staff from editing a holiday so that it spans two holiday periods.

- **Clear up time entries and shifts for cancelled absences and holiday requests**

This update will automatically tidy up shift and time entries so that when a request is deleted, the shift is returned to the way it was before the request.

To use: Automatically applied when requests are cancelled.

2. In Detail...

2.1. Pay Scales

This update has added the ability to set different pay scales and define point values for each range of salary/hourly rates.

2.1.1. Implementing Pay Scales

Pay scales differentiate pay levels for a job within a company. You can assign the pay scale to a specific contract, and the system will automatically calculate where a skill falls on the pay spine for that contract.

To implement this new feature, you must ensure it is set up in your Global Settings. Then, go to the Features tab and enable Pay Scales (Spinal Points). Before a pay scale can be set up, managers must also be permitted (under permissions) to create and manage it.

Go to Pay > Pay Settings > Manage Pay Scales to set the pay scale. The first step in creating a pay scale is to set up your details. Once your details have been set, you can add the spine points to your pay scale. To do this, click to edit the pay scale you have just created. You can include as many spinal points as is required.

Pay Scales

1-C

Effective from 01/12/2024

Hourly Value	Title
9.000	1
11.000	2
13.000	3
14.000	1

2.1.2. Assigning Pay Scales

Once you have created a pay scale, you can assign it to a contract under the details section of your contract (Contracts can be found under Pay > Manage Contracts).

Version 3

Details Working Pattern Breaks, Rests & Limits Holiday TOIL Absences Shifts & Time Entries

Contract Details

Contract Title
Visible to staff

Permanent (Monthly)

Description
Information for managers

Type
This determines the language used and remuneration types

Permanent

Payscale

✓ - None Used

1-C

2-C

3-C

4-C





First

Employment Contract

Default Contract Document
This is a digital document that the staff member is required to sign online.

Contracted Hours

Once assigned, you can view the pay scale on their profile under the training and skills tab.

 Skills				
Pay Scale Title (Grade)				
	<u>Bar Crew</u>	Bar (£11.00)	1-C: 2	ACTIVE
	<u>Duty Managers Bar</u>	TOFS DM (£13.00)	1-C: 3	ACTIVE
	<u>First Aid</u>	Ents Rate 3 (£14.00)	1-C: 1	ACTIVE

As you can see from the figure above, each skill has the same pay grade, which is determined by the staff member's primary contract. This is the general pay bracket they should be in for their contract.

Using pay scales allows for a range of hourly rates to be expected for the contract to which they have been assigned. This will typically range from a starting rate and will gradually increase. The system will calculate which points in the spine at which that skill is paid based on the skill that has been assigned and the pay rate for that skill. For example, if a staff member is paid at £13 an hour for the skill 'Bar Crew' and within that pay grade point 1 is paid at £13 per hour, the number 1 will appear on their profile next to the pay grade.

2.2. Absences

This update has made additional improvements, including changes to absence types and policies.

2.2.1. Multiple absence types in a single day

Multiple absence types are now supported per day. This might be used if a particular kind of absence covers some of a staff member’s hours. For example, with maternity pay, if a staff member is transitioning back to work and working half days, this is covered by maternity/paternity leave. But if a staff member is ill during this time, half the day they were off would be covered by maternity/paternity, and the other half might be covered by sick pay.

This might also apply if a staff member had been working half days due to jury duty and then became ill.

09/12/2024 – 09/12/2024	Sickness	Full Duration: 0.71 Days	Affected: 0.71 Days (5.00 hrs)		
09/12/2024 (Mon)	Sickness	Added automatically	0.71 Days (5.00 hrs)	EXEMPT FROM POLICY	UNPAID
09/12/2024 – 09/12/2024	Paternity	Full Duration: 0.5 Days	Affected: 0.5 Days (3.50 hrs)		
09/12/2024 (Mon)	Paternity	Added automatically	0.5 Days (3.50 hrs)	EXEMPT FROM POLICY	UNPAID HALF DAY

It is important to note that this feature can not be input in bulk. The two different types of absences must be entered individually for each day.

This feature can be implemented when reporting an absence from a staff member’s profile page. When inputting the times for each absence type, ensure they do not overlap; otherwise, the absence will not go through.

This update also automatically recalculates absences when changing contract settings, staff contract history, or an absence policy.

2.2.2. Automatic part-day absence calculation

Additionally, part-day absences no longer need a policy to calculate the ‘less than full-day’ duration. The system will automatically ensure that a holiday that is less than a day is calculated as such.

2.3. Recruitment

This update adds to the recruitment add-on, including adding extra details for successful applicants. These changes are made to the successful applicant's tab, which is part of creating a new position. There are also other options to consider, including whether or not jobs can be changed by those making hiring decisions.

2.3.1. Successful applicants

Under the Recruitment Add-On, hiring managers can now assign new positions to a specific squad under the successful applicant's tab, allowing them to organise their team structure as early as the recruitment process.

When creating a new position, go to the successful applicants tab. One new feature is adding a successful applicant directly into a squad.

Additionally, there is now a section under the heading Jobs. From here, you can assign them to a specific job immediately. A job will be a position within the structural hierarchy of your company and will establish where the successful candidate will be placed once they have been onboarded.

Job

Assign to a Job

Duty Manager

Allow Job to be changed?

This allows the decision makers to change the job when offering a position to an applicant

☒

Assignment Type

Permanent Appointment

Start Date

Used for the contract start date. If they are a new staff member this this will be used as their continuous employment start date too.

☒ No Start Date

Selecting date to match contract start

☐ Yes, make start date match the contract start

When the successful applicant receives their offer of employment, they will automatically be assigned to this job, so this will not need to be set up post-onboarding. This will make the onboarding process more efficient and the structural hierarchy more explicit.

There are also other options to consider, including whether or not jobs can be changed by those making hiring decisions. If you decide to allow the job to be changed by hiring managers, they will only need to confirm the job when offering the position to a candidate.

Create/update StaffSavvy Account

Create a new account and give instant access or update their existing StaffSavvy account

Position Start Date

09/12/2024

Confirm Job

Duty Manager

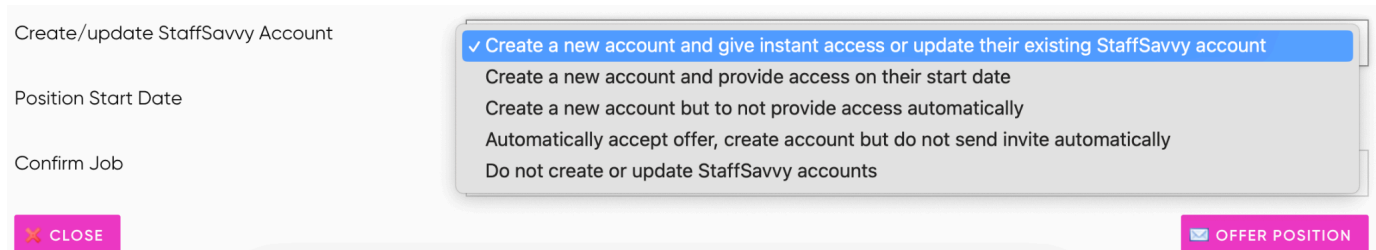
CLOSE

OFFER POSITION

2.3.2. Automatic account access

There is also the option to keep account access limited for new starters when offering employment. There are several options for how much access the new hire can be given and when.

When hiring managers are ready to offer a position, these options will be available under the recruitment tab in the managing positions section.



The screenshot shows a form with three input fields: "Create/update StaffSavvy Account", "Position Start Date", and "Confirm Job". A dropdown menu is open for the first field, displaying four options: "Create a new account and give instant access or update their existing StaffSavvy account" (highlighted with a blue bar and a checkmark), "Create a new account and provide access on their start date", "Create a new account but to not provide access automatically", and "Automatically accept offer, create account but do not send invite automatically". Below the dropdown is a "Do not create or update StaffSavvy accounts" option. At the bottom left is a pink "CLOSE" button with a red 'X' icon, and at the bottom right is a pink "OFFER POSITION" button with a blue envelope icon.

When clicking the offer position button, there are several options for how much access new staff will have. These include giving immediate access as soon as the offer is sent or giving hires access to the account only on their start date. Other options are not giving hires automatic access to their account but allowing new hires to be given access later by their manager.

2.3. Available Shifts

This update has made the available shift options clearer and easier to see. We have added options that allow staff to view only what is relevant to them when looking at available shifts.

2.4.1. Shift details page

Staff can now offer and take shifts on the details page of a shift, which makes the process much easier when you are interested in seeing the details before offering to take a shift, keeping everything together concisely. This feature is now available on the StaffSavvy app.

Details

Assigned: Unassigned (open to offers with managers making final decision)

Date: Sunday 15th December 2024

Times: 9:00am to 5:00pm

Venue: Coffee Hut

Event

Skill: Barista

Rate: TOFS Rate 2: £1.00 per hour

This shift is available for cover.

TAKE SHIFT

I'M NOT INTERESTED IN THIS

2.4.2. Hiding unwanted shifts

There is a new option to 'hide' a shift if you are not interested; this keeps the available shifts list smaller and allows staff to see the shifts they might be interested in. You can also immediately hide shifts in the app.

Fri 14th Feb	5:00pm to 10:30pm	An Offered Shift	Bar Crew	Venue Uno	For Lollipop	INFO	OFFER		Ignore this
Fri 14th Feb	5:00pm to 10:30pm	An extra shift	Bar Crew	Venue Uno	For Lollipop	INFO	TAKE		
Fri 14th Feb	7:00pm to 10:30pm	An Offered Shift	Bar Crew	Venue Uno	For Lollipop	INFO	OFFER		

Under the available shifts page, when viewing the list of available shifts, there is a new thumbs-down button next to the 'offer shifts' button that allows you to ignore shifts.

Not for you?

Not interested? No problem, we'll hide this and any other shifts that come up with the same details on the same day.

You can still view the hidden available shifts by using the option in the menu on the available shifts page.

Date:Friday 14th February 2025

Times:5:00pm to 10:30pm

Venue:Venue Uno

EventLollipop

Skill:Bar Crew

CANCEL

I'M NOT INTERESTED; HIDE THIS

Then, in the actions menu, you can view hidden and unhidden shifts or keep your ignored ones hidden.

Turn on/off my shifts

Just show my home venue

Turn on/off my ignored shifts

Available Shifts

Date	Times	Staff Member	Skill	Venue	Further Details
Fri 13th Dec	10:30pm to 3:30am	An extra shift	Bar Crew	Venue Uno	<div> <div>You are already working too close to this shift. You need a gap of 11 hours between any shift that finishes after midnight.</div> <div>RESTRICTED</div> </div>
Fri 10th Jan	10:30pm to 3:30am	An extra shift	Bar Crew	Venue Uno	<div> <div>You are already working too close to this shift. You need a gap of 11 hours between any shift that finishes after midnight.</div> <div>RESTRICTED</div> </div>
Thu 16th Jan	10:30pm to 3:30am	An extra shift	Bar Crew	Venue Uno	<div> <div>You are already working too close to this shift. You need a gap of 11 hours between any shift that finishes after midnight.</div> <div>RESTRICTED</div> </div>

The option to hide shifts will also appear on the StaffSavvy app and will come up with the option to hide a shift.

Saturday: 9:00am – 5:00pm

An Offered Shift Barista shift at Coffee for Grrr! The Art of Anger: Exhibition

INFO

OFFER

HIDE

Saturday: 9:00am – 5:00pm




An Offered Shift Bar shift at Uno for TBC

INFO

OFFER

HIDE

Another feature added to the Available Shifts page is that the system now defaults to only showing the first 25 available shifts with an option to view more. This is to help keep the available shifts page more legible and user-friendly. If a staff member chooses to click to view more shifts, the rest of the available shifts will appear.

n to 11:00pm	An Offered Shift	 Bar Crew	Venue Uno	For TBC	INFO
n to 11:00pm	An Offered Shift	 Bar Crew	Venue Uno	For TBC	INFO
m (midnight) to 6:00am	An extra shift	 Bar Crew	ArtifaxEvent Example		INFO

Currently showing the first 25 available shifts

VIEW MORE

2.4. Shift Week

This update has added several features to improve the look of the week view.

2.5.1. Shift Week Access

All staff can access a new view-only version of the week view, which allows them to see schedules easily but does not allow them to make changes or adjustments. This permission option must be given to staff so they can view the weekly schedule. This permission also only allows staff to see the shifts scheduled for their own venue to ensure that only relevant information is provided to staff.

2.5.2. Shift Week Hours

Another addition to shift week is the ability to choose the format in which the hours figure on the left of the screen (under the staff member’s name) is shown.

Filters Print Week Schedule Copy week Publish Shifts (Send Notifications) Manage Quick Shift Templates Settings

Manage Week

Venue Uno:
Mon 9th Dec '24 to Sun 15th Dec '24

VIEWING: HOME STAFF SHOWING: ALL SHIFTS ABSENCES: APPROVED ONLY SORT BY: STAFF

Week Starting: 09/12/24

Actual Contracted Hours
☒ Planned Paid Hours
 Planned Scheduled Hours
 (ignore breaks)
 Planned Working Hours
 Planned Contracted Hours

Time Format
 Always Show
 Weekly Hours
 Events
 Colour Coding

Staff	Mon 09/12/2024	Tue 10/12/2024	Wed 11/12/2024	Thu 12/12/2024	Fri 13/12/2024	Sat 14/12/2024	Sun 15/12/2024
Quick Edit Events	Manic Mondays	Little Miss Muffet (Event: TBC	Ja		Super Saturdays	Sun
Events	Manic Mondays	Little Miss Muffet (live)	James and the Peaches (live)	Lollipop		Super Saturdays	Sun
Budget	167.02%	128.7%	EST: £0.00	105.45%	130.7%	141.7%	
Extra Shift	18:00-20:00 18:00-20:00 18:00-20:00 18:00-20:00 18:00-20:00 18:00-20:00	18:00-20:00 18:00-20:00 18:00-20:00 18:00-20:00			22:30-03:30		
Aaron Grafton 11.50 hrs							

The options include several options for displaying a staff member's hours. Whilst all the options are relatively similar, there are some key differences between each option. These include:

- Actual contracted hours - This is how many hours a staff member is currently expected to do under their contract. This option considers time entries that have happened and shifts that are planned to occur during the contract period.
- Planned paid hours - These are the paid hours for the shifts in that week.
- Planned scheduled hours (ignore breaks) - The scheduled hours to be in work that week. This option ignores breaks completely.
- Planned working hours - The planned working hours for the shifts in that week view. This option ignores any manipulations, including double time or minimum call time.
- Planned contracted hours - These are the planned contracted hours for that week. This option will ignore unpaid breaks and pay manipulation rules but considers contracted time manipulation rules where some shifts might be excluded from their contracted hours.

If you have any feedback or future suggestions or need additional help, please contact us directly at support@staffsavvy.com