User Guide: New Features & Changes in v2025.2.0

1. New Features

1.1. Changes to Current Version & Recommended Actions

Replacement of the Manage Shift Week

This update replaces our weekly shift scheduling page with an updated version allowing up to 6 weeks of scheduling in a single view. This replacement page has many more improvements and new tools to benefit users.

The page has been carefully designed to be similar enough to the previous version so that users can quickly continue to use it as before. However, we recommend giving your managers advance notice of the change and directing them to either read this guide or watch our introduction video.

Different Hours Per Day of the Week

This will not affect existing contracts. The system now allows you to set different working durations per day of the week without requiring a repeating shift pattern.

This can be configured on the contract itself. There is a risk of changing existing holiday and/or absence calculations if you choose to update your contracts to use this setting.

We recommend discussing the change with our support team first and testing the options with a single staff member. When you are ready to apply it to all affected staff, please use the Dated Change option when saving the contract. This will ensure that all calculations before the date change will not be affected.

Note that dated changes add contract records to the staff member’s account.

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.

- **Manage Shift Week Replaced by Manage Shift Schedule**
  The Week View has been replaced by Schedule View, offering a more straightforward layout and additional features. Key updates include showing up to six weeks of shifts on a single page and the ability to quickly copy, cut, and paste shifts. This is in addition to faster editing and easy shift duplication for offered, extra, or unassigned shifts. New view options include viewing staff availability directly on the planner, showing national holidays and different colour options.
  To use: Go to Shifts > Manage Shift Schedule. For more information, see our In Detail section below.

- **Library Enhancements**
  Several changes to the resource library have been made, including adding a dedicated management page. You can now add library items to skill requirements. Staff members with that requirement can be asked to review, view, or add a digital signature to an item. Also, managers can apply a grace period to allow time for staff to review/sign new versions of the library item. Additional changes have also been made to the layout of the resource library, including drop-down menus and the editing options within it.
  Other additions include version control and digitally signed items.
  To use: Go to Training > Resource library. For more information, see our In Detail section below.

- **Different hours per day on contract settings**
  This update allows you to now set different working hours per day directly on the contract without needing repeating shift patterns. This means that holiday and absence calculations can record different hours on a Friday compared to the rest of the week.

  This feature will mean more accurate calculations for those with different hours per day, without the extra work and hassle of requiring repeating shift patterns. Before implementing, we recommend you reach out to our support team, who can help test the changes before making them, as this can easily affect existing holiday and absence calculations.
  To use: Go to Contracts > Edit Contract. Go to the Working Pattern tab and change the hours per day to the first option in the list. Please note that this is not available if your holiday configuration is set to complex mode, which uses the shift patterns.

- **New custom report features**
  The new update includes several changes to how custom reports work, including the ability to add filters to individual columns and a series of new template reports.
  To use: Go to Reports > Manage custom reports. For more information, see our In Detail section.

- **Triggers**
  New Trigger updates. Triggers are now searchable and can be added to categories for easier management. There are also new trigger events that have been added to the following categories:

- Recruitment
- Work eligibility
- Changes to shift
- Certificate
- Duration

To use: Go to System > Manage Triggers > Then edit or create a new trigger. From there, you will see the "triggered when..." button. Here, you can choose the aforementioned trigger events/actions.

1.3. Additional Improvements

- **Personal Record Report is now available**
  You can now create a new type of report, the Personal record report, to view all completed records. This type of report can be used to record a staff member's conduct and might include verbal warnings, reports on probation periods or summaries of 1-1 meetings. This is useful for checking staff records, including signatures and expired items. When viewing your records, you can filter by the record type to only view records from specific venues or staff members.
  To use: Go to Reports > Welfare & Performance > Personal record reports.
- **Personal records are now shown in the document store.**
  All personal records are now shown in the document store, including any warnings or disciplinaries on the staff member's record. This keeps all your employees' information in one easy-to-find place.
  To use: Go to a staff member's profile. Under the Actions menu, select View staff member's documents. There is now a new tab called personal record.
- **Editing time entries in pay elements**
  Restrict permission to change or manually set the pay element. The permission is called 'Manually choose or change pay elements per time'. This option allows those with this permission to choose or change pay elements manually per time entry.
  To use: System > Levels & Permissions > Manage access permissions. Type in 'Manually choose or change pay elements per time entry' and select the level that will give you this permission.
- **Remote clock-in breakdown**
  A new option allows team members to enter their working start and finish times and quickly break down hours against each cost code when adding retrospective time entries. You can also specify how much this can be broken down to, whether at the minute or hourly intervals.
  To use: For managers, enable under System > Configuration > Global Settings > General Configuration > under cost codes, there is an option to enable Remote Clock-in: Quick Breakdown. For staff, go to Shifts > Remote Clock-in. Under retrospective time entry, add your hours breakdown alongside the appropriate cost code.
- **Salary options**
  Add salary as an FTE (full-time equivalent) figure, and the system will calculate the actual salary. You can also add the exact wage; the FTE figure will be calculated for reports. When in use, the system will take the input salary and pro-rata it based on any FTE calculation to provide the actual salary. When unchecked, input their actual salary, the system will output the FTE salary for reports.
  To use: Go to a staff member's profile > in the actions menu, go to edit the staff member's details and select Manage Contracts. Add a new contract entry or edit the current entry. Then, when adding in a new salary figure, there is a tick box for the FTE figure.
- **New contract options**
  This update includes several new contract options that expand on our existing options. You can configure each contract under Pay Contracts > Manage contracts and choose to edit or create a contract.

- There is a new option to set different hours per day of the week. This can be helpful if you have an early finish on Friday, but not necessarily a half-day. Here, you can set exactly how many hours you have each day.
  To use: Go to edit/create a contract. Select the Working Pattern tab. Under the first tab 'Normal Hours per full day', where you would typically select the number of hours in a working week, instead scroll up, past all of the hours options to the very first option 'Different hours per day of the week'. This will then bring up a sidebar next to each day on the right side of the page, with the option to set how many hours are needed each day.
- There is a new option to auto-close absences. If absences are created automatically due to non-attendance, keep the shifts open or close them automatically. This is created when flagging a shift as non-attendance.
  To use: Under absences, you will find several auto-close absences.
- There is a new option for TOIL, where the system can recommend a specific number of rolling hours for managers to confirm manually. The system will automatically recommend a total number of hours that should be rolled each week, but wait for a manual TOIL request. For example, the system might say "The staff member is owed 10 hours", and the manager then confirms this, edits it or cancels it.
  To use: Under the TOIL tab under TOIL mode, select the 'Automatic TOIL recommendations with manual claims.

- **Shift Swapping for longer shifts or more important skills**
  This update allows staff members to swap shifts for longer or more coveted shifts. Previously, you could only swap shifts of the same length, but this update has provided more flexibility.
  To use: Go to Shifts > My shifts > hover over options and choose the 'exchange with' option here or on the shift details page. This will show a list of all staff members you can swap with.
- **Recruitment**
  A new addition to recruitment is the ability to download a single application form. Rather than downloading all the applications simultaneously, you can view a single application in PDF format, which is helpful if you want to view an application from a specific applicant.
  To use: Recruitment > Manage recruitment > Go to view active applications and click to view the application you want to download. In the actions menu, you will see the option to download as a PDF.
- **Restrict historical time entries**
  You can now prevent time entries from being added before a specific date. Enable the new permission (Ability to set historical restriction) and then set the time restriction from the Manage Wage Sheets page. Once set, all future wage sheets created will not include time entries from before that point in time. You can update this restriction at any time using the same button. This is helpful for payroll and preventing unauthorised historical entries. Setting a date limit where entries cannot be added without permission improves manager oversight and prevents time entries from being input for those past closed periods. This is also helpful for correcting user error mistakes, like inputting incorrect year entries.
  To use: Go to System > Levels & Permissions > Manage Permissions > Enable 'Ability to set historical restriction'. Then go to Pay > View Wagesheets and click Set time entry restriction under the actions bar.
- **Make breaks optional**
  There is a new ability to make breaks optional; exclude them from automatic creation, and have them not checked when adding a remote time entry. This can be done under your break policies and must be set under each break in your policy.

To use: System > Absences & Breaks > Break Policies. Edit the break policy, then the break group you are interested in. Then, edit the breaks within a group, and finally go into editing a specific break. Under the options here, choose never automatically to include this break.

- **Steplists**
  Steplists now support reminder emails at a frequency that suits your needs. Configure each step list.
  Go to System > Staff data & processes > Manage step list.
- **Jobs**
  Jobs can now be assigned as Fixed-Term. This supports jobs that are shorter-form contracts established for a fixed term, such as six months.
  To use: System > Staff Data & Processes > Manage jobs. Then select the Manage Assignments button. Here, type the name of a staff member you want to appoint, then under job type, you can now select the fixed option.
- **Additional hours for Earn & Claim holiday requests**
  The ability to add, earn, and claim requests above the hours earned has been added. Only the earned hours will be paid during the requested holiday. This option allows claims to be requested for hours not yet earned, assuming they will earn enough over the year. Only earned hours will be claimed, so they cannot be paid more than earned.
  To use: Go to Pay > Contracts > Manage contracts. Edit the contract you are interested in. Under Holiday, there is the option to 'allow claim requests above current earnings'. Select how many hours over the current earnings can be added.
- **More icon options**
  There are now an additional 70 icon options available under Skills. The expanded range allows you to have more variety for your roles and have icons use specific and easily recognisable icons.
  To use: Staff > Staff settings > Staff skills > Create a new skill. Under the Create a New Skill page, there are multiple new options for you to select from in the styling section.
- **Archive date**
  Added option to manually extend the auto archive date. This means even if you have set up a policy to auto-archive an account after a month of inactivity under global settings, managers can manually reset the date (from which the month starts to count down) from a staff member's profile. With auto archive, there will be an expiry date that the staff member will be archived after - once reset, that date will change to a month from the date it was reset.
  To use: System > Configuration > Global Settings > Data & Policies. Turn on auto archive and save the new configuration. Then, to reset, go to the staff member's profile, under the employment details tab and click reset.
- **Improved integration support**
  Added support with Momentus Elite (previously VenueOps) to display functions instead of events and to filter function types per venue. By default, we will use the Events in Elite and create Events to match. However, if you use Functions, you can use those as the Events within StaffSavvy.
  To use: Go to System > Configuration > Global Settings > Integrations. Scroll to Momentus Elite and enable 'Use Functions as Events'.
- **Artifax Event Activity Filter**
  Additional support is now available from ArtifaxEvent to filter activity types per venue. Only use Events with the selected activity types. Leave all unchecked to disable this filter.

To use: Go to System > Venues > Manage Venue. Click on the venue you want to edit, go to the Artifax integration tab, and scroll to Activity Filter.

- **Weekly Timesheet hover function**
  The weekly timesheet now shows any cost codes and additional cost codes when you hover over a shift time entry. This makes checking the values quicker and easier.
  To use: Go to Pay > Weekly Timesheet. Hover over a shift, and the cost code reference will appear.
- **Manipulation rule enhancements**
  Several new filter options are available under manipulation rules.
  - For minimum paid hours rules, you can choose if the system should look at all hours worked back to back or just the hours worked under the selected roles/skills for that rule.
    This allows you to treat certain types of shifts as independent from all other work for the purposes of minimum paid time. For example, a staff member might be paid a minimum of 3 hours for assisting with production load out at the end of a full day of work. This change will allow you to always pay them for 3 hours for that load out, even if they have also previously worked 10 hours in another row.
  - You can also set whether to calculate hours based on the raw working hours, which are worked hours (excluding breaks and manipulation rules), or default contracted hours (excluding breaks but including manipulation rules).
  - The final manipulation filter allows you to choose whether to apply this to normal working hours, holiday entries, absence time entries, or a combination of the above. This allows you to pay holiday hours as though they were working time.
    To use: Go to Pay > Contracts > Manipulation rules and create or edit a new rule. The new options are under Additional Filter Options.
- **Absence and Holiday time entries can be set as approved automatically**
  Time entries can be set to be automatically approved depending on the contract.
  To use: Go to Pay > Contracts > Manage contracts > Select and edit your chosen contract, and go to the absence/holiday tab under the Add Holiday Time Entries option.
- **Duration triggers**
  In this update, Duration triggers can now be set to run immediately. This might be used for expiring documents if you want to trigger the action immediately after this, as happened without a grace period.
  To use: Go to System > Manage triggers. An 'Immediately' option is now available when creating a new duration trigger under Duration.
- **Countersignature report shows who needs to sign**
  Under the countersignature report, under the 'Who Can?' title, you can see who is required as a counter signature.
  To use: Go to Reports > Staff > Countersignature report. If you have access to view it, you will be able to see who can countersign each document.
- **Historical snapshots are now linked to weekly preferences**
  Historical snapshots will now be saved when the preferences are updated rather than when a shift is assigned. It will save a snapshot of the new preferences after they have been changed.
  To use: Automatically applied when scheduling a custom report.
- **More straightforward layout for time entries under the remote clock in**
  The layout under retrospective time entries for remote clock-ins has been adjusted to be cleaner, more

concise and user-friendly. Breaks have been modified to be seen as a list, and you can select relevant breaks. Additionally, the cost code section has been altered. It is now a Breakdown of hours, including a cost centre (plus an additional cost code reference if desired) and a drop-down list where you can manually adjust hours worked. The number of hours can not exceed what is logically possible based on the start and end date, and automatically factors in breaks.
To use: Go to Shifts > Remote Clock in. Then you can make these changes to a retrospective time entry.

- **Silently restore archived accounts**
  Under Archived staff, there is now the ability to restore an account silently. This option still prevents staff from having login access, but managers can access the account.
  To use: Go to Staff > Staff settings > Archive staff.
- **Disable archive notifications**
  You can disable archive notification emails. Selecting this option will prevent any affected staff member from receiving an email notification when their account is archived.
  To use: Go to Global Settings > Staff & Contracts > Email Prevention. Select the option
- **Absences and holidays are automatically approved**
  Absence and holiday time entries can be set to be approved automatically depending on the contract.

  This also includes options for auto-closing absence reviews and time entries, streamlining the approval process. So, if creating an absence due to non-attendance, you can now select the default option. Do you want the system to keep absences open or close them automatically? If you select no, they will be kept open till the staff member next attends a shift or a manager manually closes the shift. There are two more options: Yes, end the absence automatically at the end of the absent staff member's shift, or close the absence at the end of the working day.

  There is a similar option for holidays, where (under Holiday Settings > Add Holiday Time Entries) you can auto-add holiday time entries for approved holidays. You can authorise these immediately, and these time entries will go straight through for approval. This is recommended if you are using automatic TOIL. We recommend using the unapproved time entries option if you are using automatic TOIL for pay as well.

  To use: Go to Manage Contracts. Click to edit the contract you are interested in and select the Absences tab. Then, under Absence Auto-Close, choose your option from the dropdown. Then go to the Holiday tab and choose an option under Add holiday time entries.
- **Default role automatically disabled in templates**
  The default role is now disabled by default when adding new lines to a schedule template, as this is the most commonly used option. Previously, the staff member would be assigned to their default role. If you want a staff member to be assigned their default role in a template, you must choose that option under Default Skill (D.S.).
  To use: This is applied automatically to new templates. If you want to use a staff member's default skill, you must go to Shifts > Schedule Creation > Manage Templates > Create a template. Once a template is created and you have added spaces to the template, under D.S., click until the green arrow is shown.
- **Restriction rules progress on the Dashboard**
  Restriction rules can now have the current process displayed against the limit, and there is a retrospective time entries panel to allow staff members to keep track easily. Under the Dashboard, hours worked so far

are clearer to see under ‘My Hours. ' There is now a percentage bar telling you how many hours you are from your maximum and minimum hours. This can be helpful if you have working-hour restrictions as a visual means of keeping track of your hours.
To use: This can be viewed on the Dashboard under My Hours. This is automatically applied, so no action is required.

- **Display the requested date and time on the absence authorisation page**
  The system will now display the time and date requested for the absence under the absence authorisation page. This is to improve clarity on absence requests.
  To use: Go to the Dashboard and select the notification to approve new absence requests. You will see that it now includes both date and time.
- **Display document when viewing an acknowledged alert**
  Staff can now revisit old documents they have already signed in alerts, whereas previously, staff could not see a document once it was signed.
  To use: Go to My Account > My Alerts. Click to view an alert.
- **New TOIL usability report**
  A new TOIL history report has been added that displays a breakdown of hours for the stated period and provides the option to download to Excel as an XLSX file.
  To use: Go to a staff member’s profile. Then, in the actions bar, go to Reports and in the drop-down menu select TOIL History report. From here, you can filter by date and download the report.
- **Staff Training Certificates**
  This update improves the usability of the Certificates page. When changing a certificate entry, the system won’t forget what you were filtering for in your search if you update a record or upload a certificate. After saving a new record or uploading a certificate, you will be returned to the same page with your filtered search saved.
  To use: Go to Training > Staff training status > Staff training certificates. Under the certificate name, choose the status of the certificate: a star = has access and needs completed, a cross = no access, a tick (and a pencil) = completed but can be edited. For this option, click the pencil icon and add a new record.

2. In Detail…

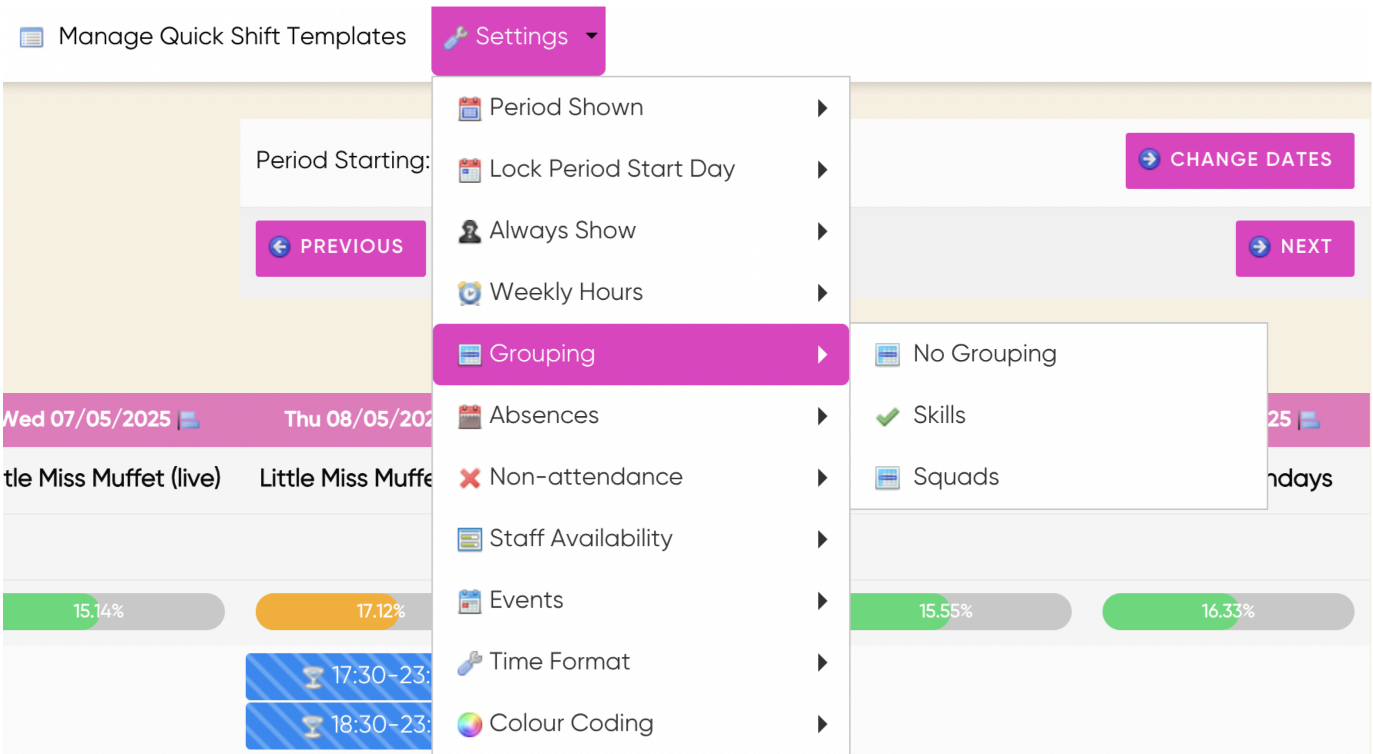
2.1. Manage shift schedule

The manage shift schedule (formerly manage shift week or week view) has been updated to streamline the page and add some new features to the system. It can be found under Shifts > Manage shift schedule.

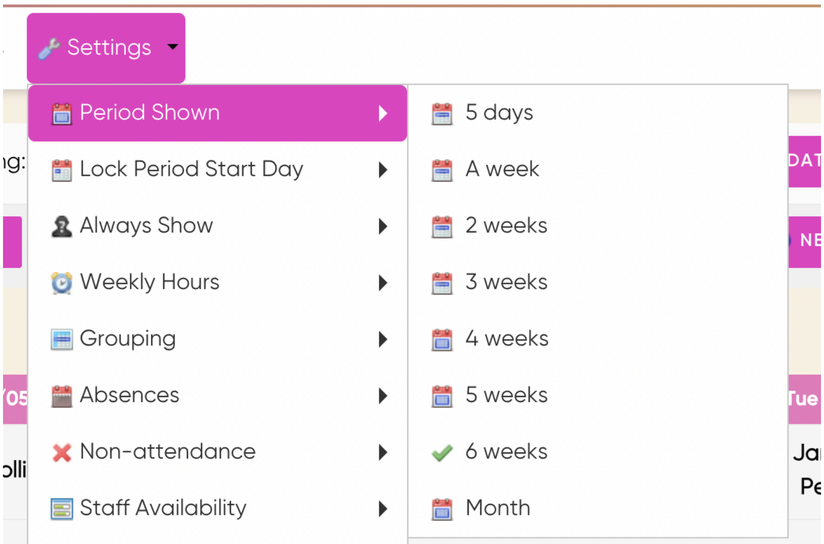
You can also show up to 6 weeks on a single page, copy, cut & paste, plus faster editing and easy shift duplication when creating offered, extra or unassigned shifts. New view options include viewing availability directly on the planner, showing national holidays and different colour options. Schedule View can now toggle events on or off as well.

2.1.1. Settings

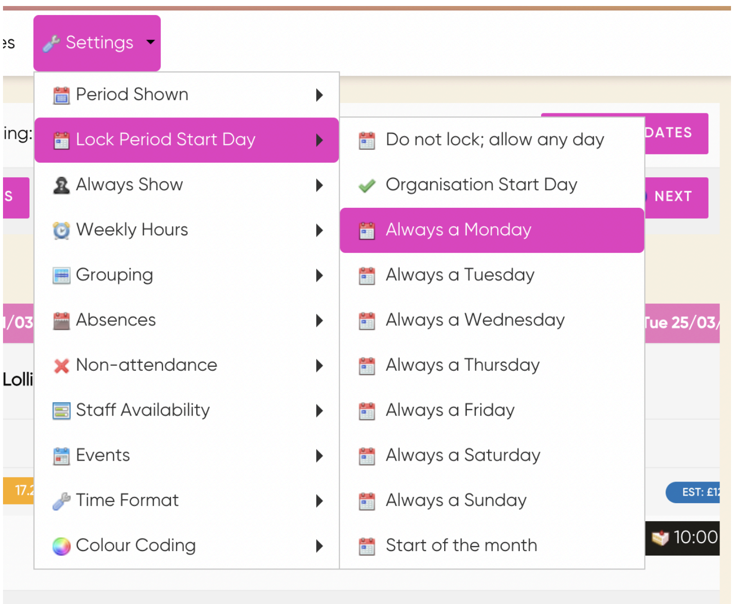
New additions have been made to settings. Non-attendance and absence viewing options have been moved from running along the top of the days of the week to the settings menu. This is to have all your sorting options in one location. The ‘sort by’ option has also moved to the settings menu. It has been renamed ‘Grouping’ and still includes grouping by skills, squads, or no grouping. There is no longer the option to sort by ‘staff name’, but if you select no grouping, the list below will show all employees in alphabetical order by default.



In addition to moving these features, there are also some new additions to the settings. You can adjust the period shown below beyond the standard week. You can now display a single week, only five days, two weeks, three weeks, four weeks, five weeks, or six weeks. Alternatively, you can have the display show the entire month. When selecting more extended periods, you must scroll along to see the later dates.



Another new option is being able to lock in which day the 'week' will start. For example, you can set it so that the working week always starts on a Tuesday. Additionally, when searching for a day in the search bar, simply pick any date, and the start of the week would be set to the nearest Tuesday to that date.



You can also set the length of the period shown. This can be between one and six weeks or set to a month. If you choose to set the period as the whole month, ensure you lock the start day to the start of the month option.

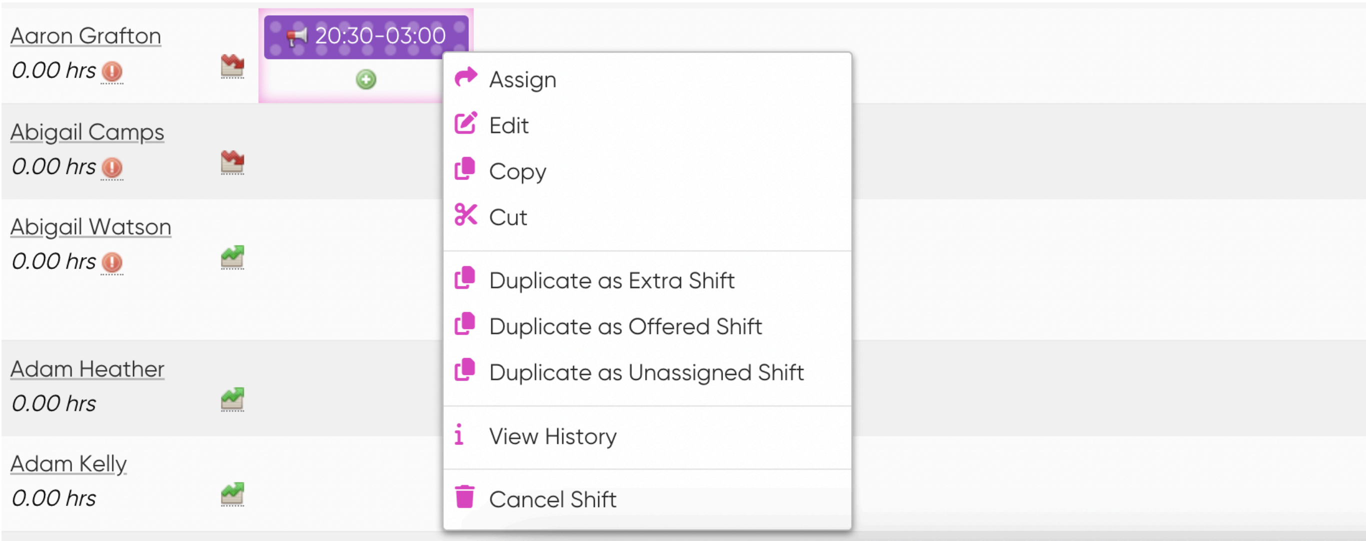
Otherwise, you will not be able to see any week after that first week, as when viewing the monthly view, this mode will always need to start from the first week of the month.

This is an example of how these two new options complement each other and can be used together. There are also options here to start on the organisation's start day. These options allow you to choose whatever combination best suits your company's needs, making your Week view more flexible.

Additionally, Earn & Claim Holiday is now automatically condensed on the week view and unprocessed pay view.

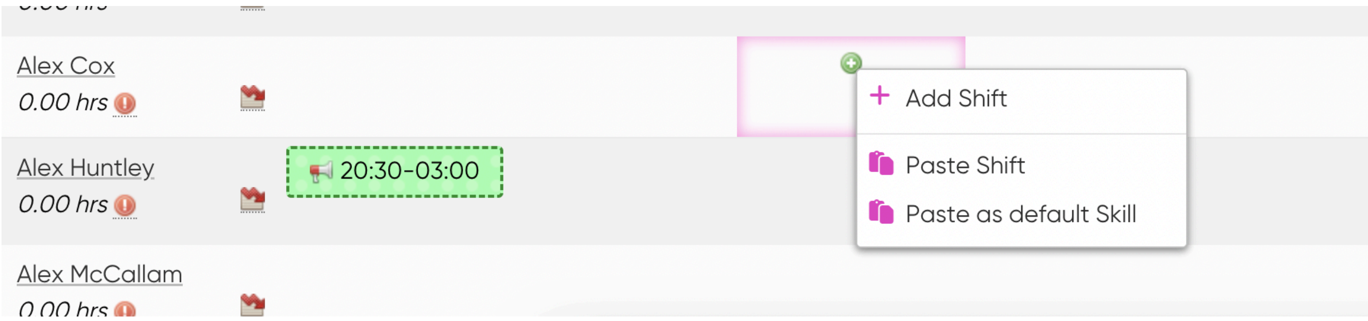
2.1.2. Quick edit options

In addition to tidying up and expanding upon the settings, our new update makes it easier than ever to change scheduled shifts. To see these new options, right-click (this might be control click on a Mac) on the shift you wish to change (Note - these options appear if you click on a shift directly, not on an empty time block).



The first option is to assign a staff member to the shift. Click to assign to a specific staff member or change to an offered/extra/unassigned shift. The edit button is still present, and you can edit the details of the shift, including the time, date, skill, venue, etc.

You can also copy and cut shifts to other times and dates in the week, making it easy to copy over shifts. When you copy a shift, it will come up with the option to place that duplicated shift anywhere there is a free time block. You can either paste the shift completely, including the skill type, or change the skill to whatever the default skills are for the staff member you have assigned it to. This new shift can be added to any other day.

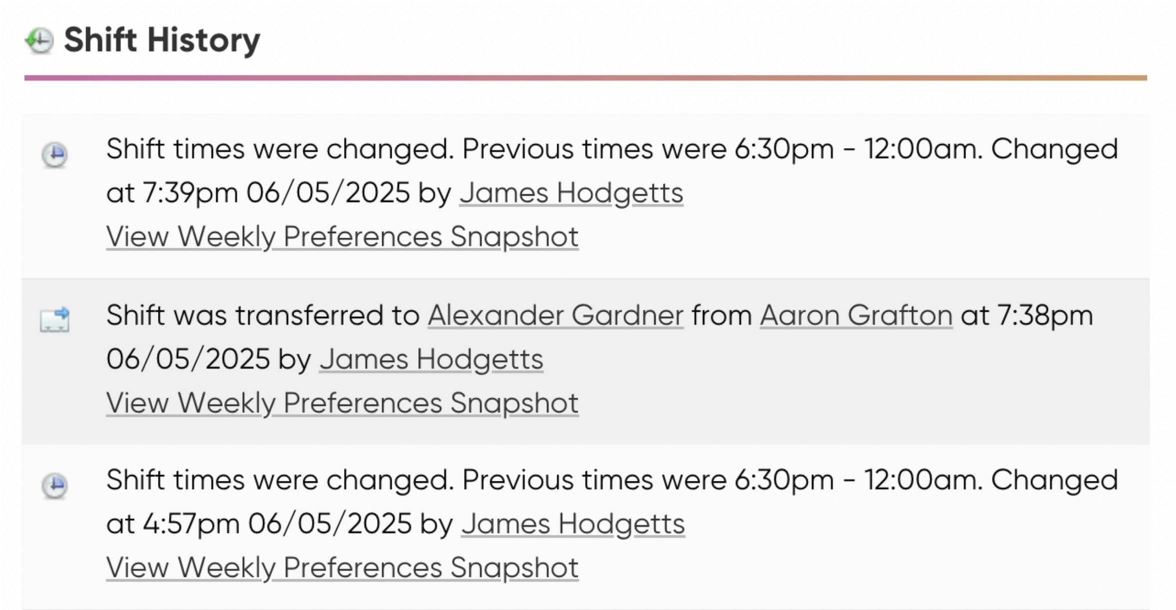


There are also three duplicate options.

- Duplicate as an extra shift
- Duplicate as an offered shift
- Duplicate as an unassigned shift

Simply select the type of shift you want to add, and a new shift will be added on the same day at the same time as a new shift. Then, you can offer or assign the new shift to a staff member. This is useful if you don’t want to add a shift to a specific staff member. It also makes it much faster to add many of the same shifts at once on this page, as opposed to the manage shifts page.

There is also the option to ‘view history,’ which will show you the shift details, including other colleagues on shift, the management on that shift, and the shift history, including any changes made to the shift, including who created the shift, and if changes have been made to shift times and details.

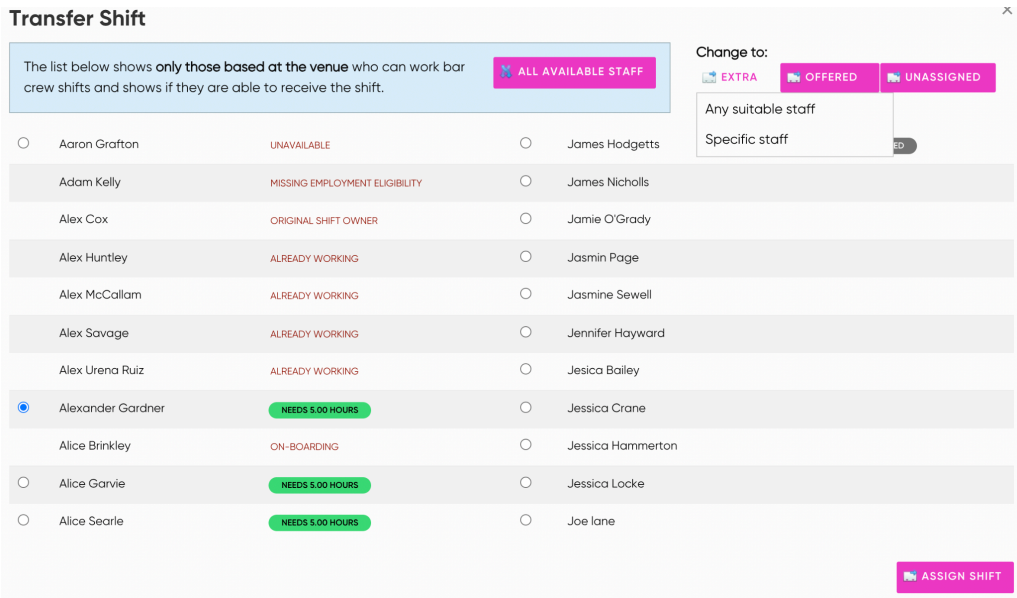


Additionally, you can quickly cancel the shift using the rubbish icon.

2.1.3. Transfer shifts menu

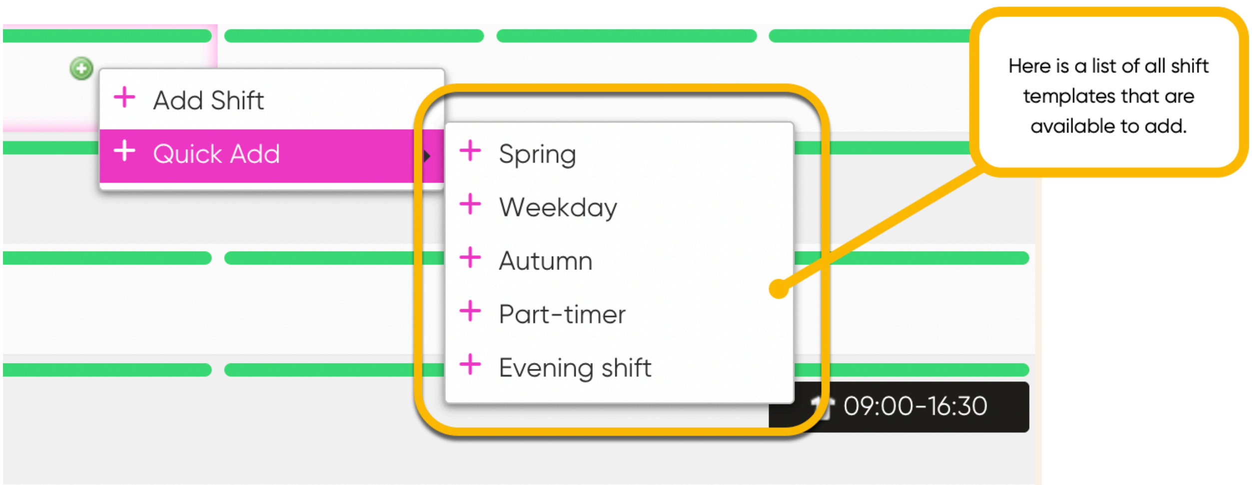
There have also been subtle changes to the menu that appear once you right-click to assign a shift. As mentioned, the list below shows everyone who can work new staff shifts and whether they can receive the shift.

However, under the ‘change to’ button, you can now assign the extra/offered shifts to any suitable staff member or a specific staff member within a specific group.



2.1.4. Quick add templates

With employees without contracted working days and shifts, you can quickly add a shift template to their week. Right-click an empty shift slot, and a list of all your shift templates will appear under the Quick Add button.



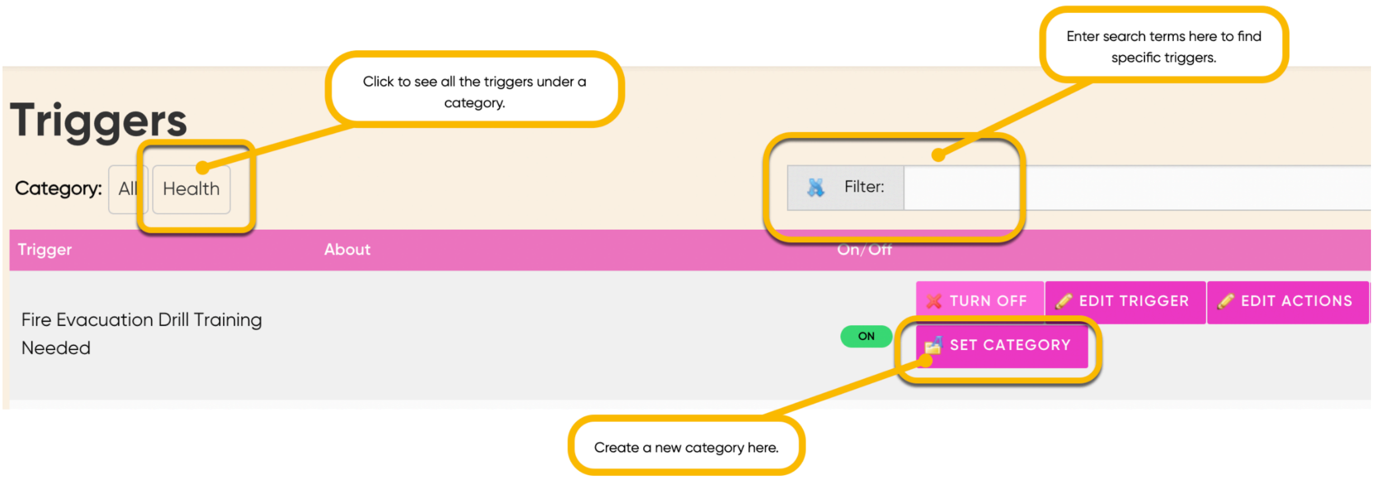
It is important to note that, depending on what shifts are already scheduled in the system, you can only add a shift template that does not clash with those shifts.

2.2. Triggers

Significant improvements have been made to the Triggers page. Triggers are now searchable and can be categorised for easier management. New triggers have also been added to the system.

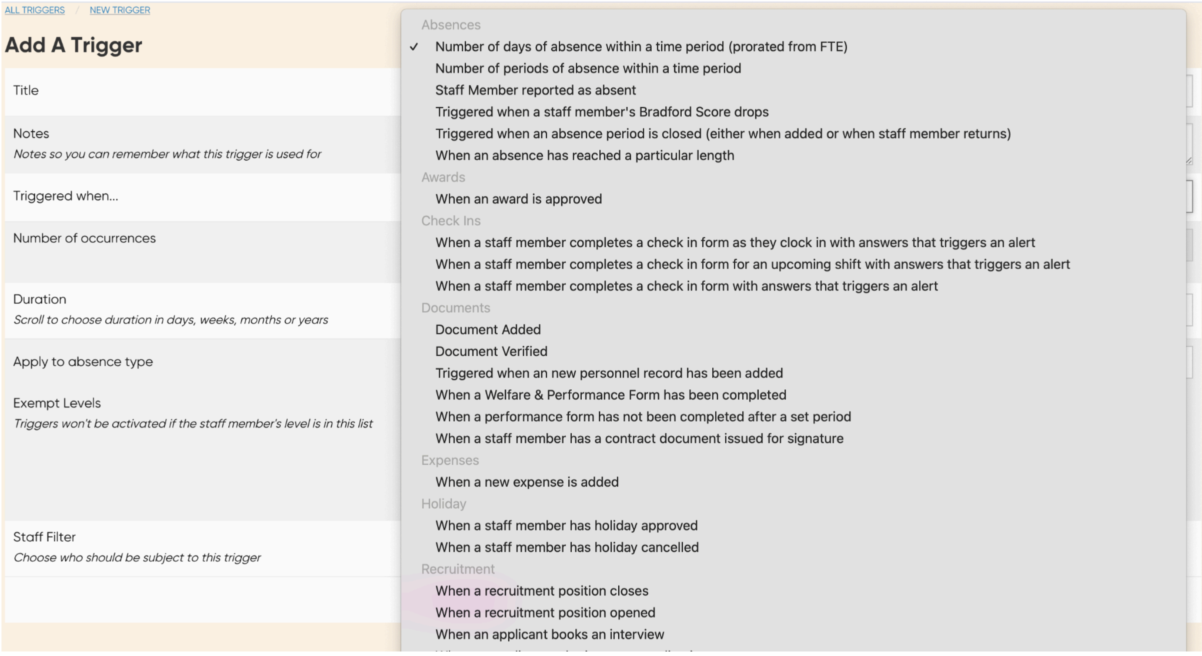
2.2.1. Trigger categories

As triggers have expanded, we recognise that managers need to be able to locate and categorise triggers easily. If you use many triggers within the system, it is necessary to be able to locate them quickly. You can now search for a specific trigger under the Triggers menu under System > Manage Triggers. There, you will see the complete list of all triggers, and on the right, there is now a search bar to search names by clicking the filter button.



Additionally, you can add triggers to a category. To create a new category, click ‘Set category’ and give your category a title, i.e. Recruitment triggers. The new category will be included in the category section. To add more triggers to a category, set them to the same category name you created before.

2.2.2. New Trigger events



Trigger events are now sorted under the following categories:

- **Absences**
- **Awards**
- **Check-Ins**
- **Documents**
- **Recruitment**
- **Regular Schedule**
- **Reports**
- **Shifts**
- **Staff**
- **Time Entries**
- **Training**
- **Work Eligibility**

The following NEW trigger events have been added under each category.

Documents

- When a performance form has not been completed after a set period

Recruitment

- When a recruitment position closes
- When a recruitment position opened
- When the correct number of offers has been made to fill a position
- When a staff member books an interview

- When an applicant submits a new application
- When an applicant withdraws from a position
- When an applicant withdraws from a position, and they have an upcoming interview slot
- When shortlisting is complete for a position

Shifts

- When a staff member offers to work a shift
- When an attendance flag is manually applied to a shift

Staff

- When a staff member’s account level has been changed to a selected level
- When a Steplist has not been completed after a set period
- When a staff member is assigned to a squad
- Triggered after an account has not logged in for a set duration
- When a staff member's account level is changed to a selected level
- When a staff member updates their name (including known as, legal or middle names)
- When a staff member has their leaving date removed
- When a staff member has been inactive for a period (no shifts, time entries, absences or approved holidays)
- When a staff member’s continuous employment matches this duration
- When a staff member has a leaving date set
- Triggered after a set period from account creation
- Triggered after an account has not logged in for a set duration

Time Entries

- When a staff member has not had a time entry for this duration (but has previously had time entries)

Training

- When a staff member's program has expired
- When a staff member's program is complete
- When a staff member’s certificate has expired
- When a staff member’s certificate is complete

Work Eligibility

- When a staff member's Work Eligibility has expired
- When a staff member's Work Eligibility is complete and valid

2.3. Resource Library

The resource library feature has been expanded so that you can now include library items as required steps. We have also updated its look and expanded your editing options.

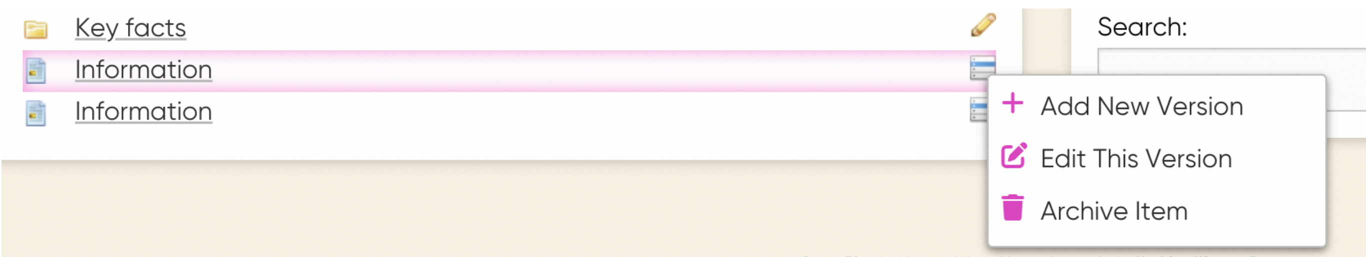
2.3.1. Resource library management page & layout changes

The layout of the resource library has changed. We now have a manage library page, which you can see under Resource library at the top left of the action bar under 'manage library'.

You can sort through all of your library resources here. You can also manage the library structure, add new files, edit files, or add new versions of a current file.

When managing your library, you can add a subfolder to help organise your resources. Previously, if you wanted to change your folder, you needed to select from a list of icons. To tidy things up, you simply click on the pencil icon next to the folder you would like to edit, and a drop-down menu will appear. This new layout change makes the management of items and folders easier. The same options still appear. You can rename the folder, add a subfolder, add an item, or archive the folder.

New options have been added to what you can do once you have created a library item. By clicking on the icon next to it, several options will appear. These include the option to archive or edit the item. There is also a new option to make a new version.

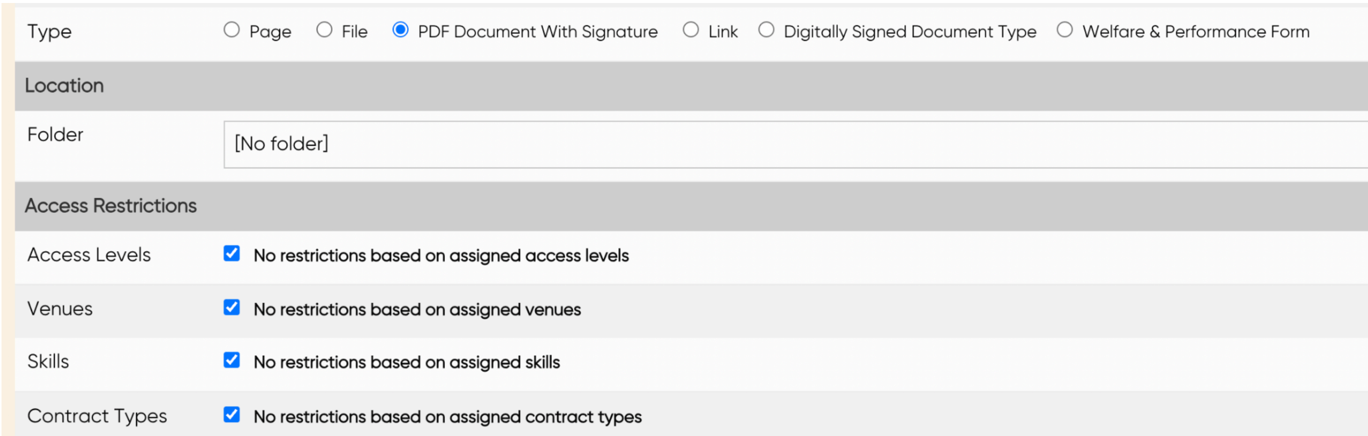


This will keep the original item as it is, but create a new item duplicated from the original. You will be taken to the edit page to change this copy while retaining the original.

You can also give this a name that explains that this is a new version of the previous item. When you edit this option, it will state the version number. You also need to add the date this new version was implemented.

2.3.2. Library Item menu option

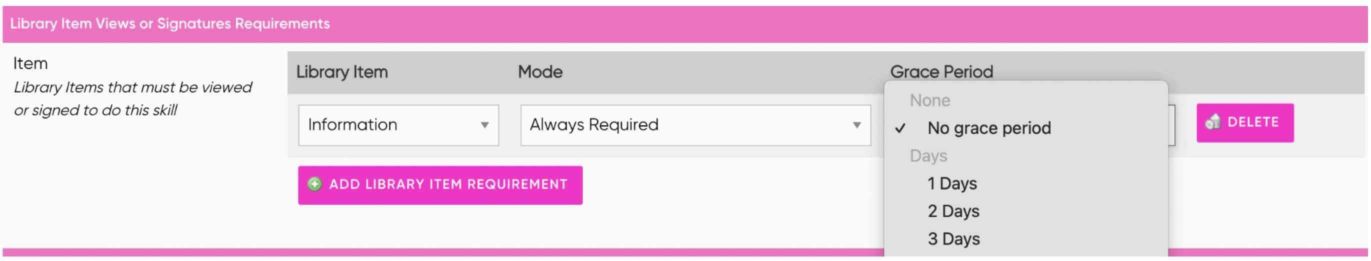
When creating an item under the resource library, you can now add a signed PDF document as a type of item.



There are also new options for those who have access to an item. Where previously you could only restrict this by skill, the new update offers several restriction options. You can limit access via access level, i.e. only system managers can view this item. You can also limit access to specific venues, skills, or contract types. This gives more specificity to your library and ensures you can manage privacy with peace of mind.

2.3.3. Skill requirements

You can now add Library items to skill requirements to review, view or add a digital signature. To do this, go to Staff > Staff Skills and create or edit a skill. You can also apply a grace period that the staff member should complete reviewing the item by, to allow time to review/sign new versions of the library item.



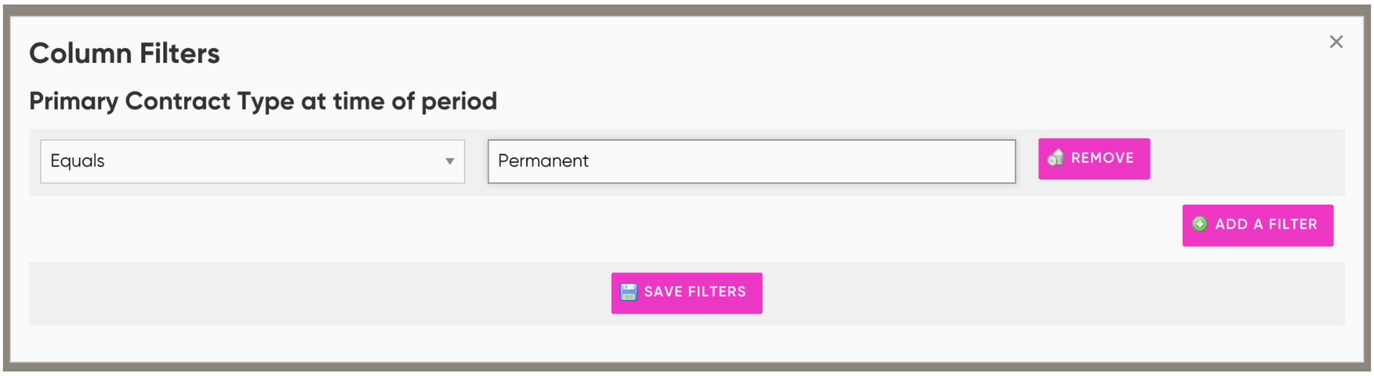
In addition, the language and function for adding a signed item have been updated. The digitally signed item is a quick version of the existing 'Append Signature' option. To use it, go to Manage Documents. Then, when creating a new document type, you can append a digital document to a library item.

2.4. New custom reports

In this new update, we have added several additions to custom reports.

2.4.1. Column filters

There have been several updates to the functionality of columns in this update. One of these new features is the ability to apply filters, which is now the default report setting. You can set a filter so that reports are always filtered by a specific thing. This means that all viewers will see the same data. To use this, click the More button next to the report you are interested in and select Manage Columns. From here, you will be able to add filters to each individual column. For example, you might add a standard column under holiday like 'Primary contract type'. Then, under filters, you might filter 'Equals permanent' or' Does not equal Casual'. This would then automatically filter so that you would only see permanent staff whenever this report was run. This change allows you to bring more specificity into your reports, creating columns customisable to your needs.



Columns can also now have customisable titles. If you have filters on your column, make the title more specific.

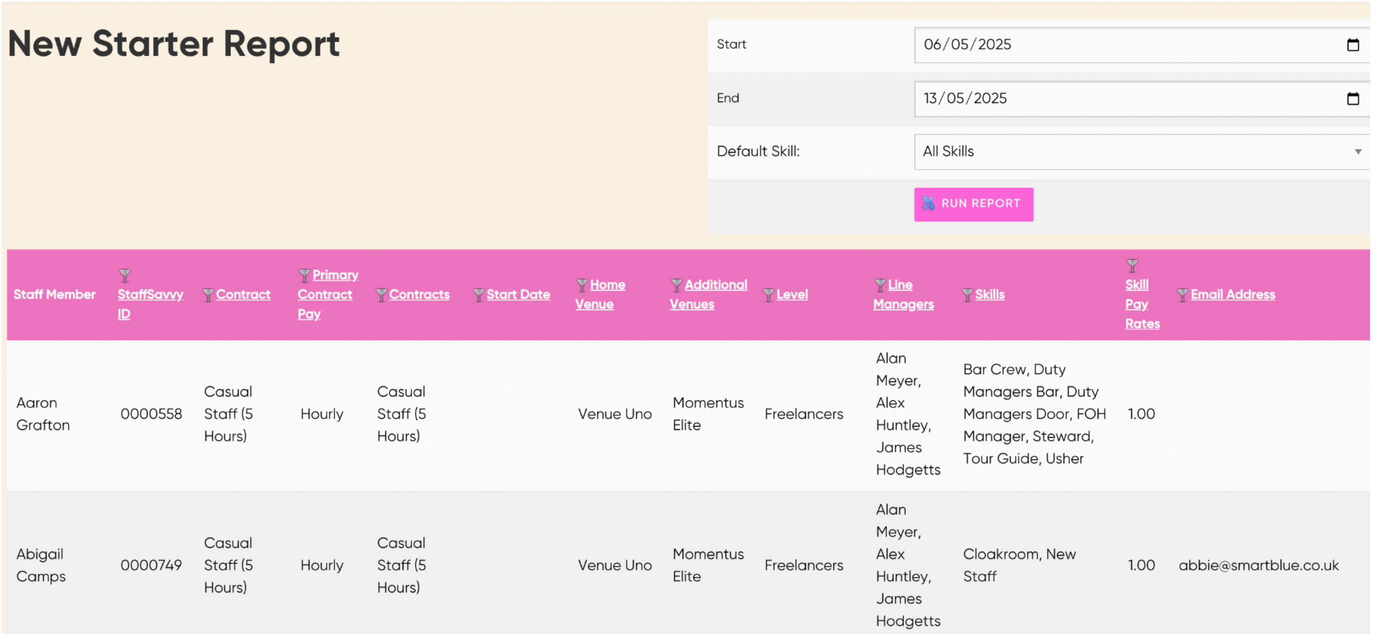
In addition to this, columns can also be hidden. This means you can apply a filter to a column and then hide it so the results are filtered correctly, but you only see the columns you want.

2.4.2. New Template reports

We have also added brand new template reports to help you get started, with key template types frequently used in HR. These can all be found under Manage custom reports. With our new templates, you can immediately run them as designed or edit them for more customisation. To edit the template, you will need to make a copy first.

These templates are reports that are frequently used in processes, including an FTE equivalent report, an absence report, Lateness & Attendance Flags report, New Starter Report and Scheduled Shifts Report. It is helpful to remember that when running these reports, you can set how far back you want to go and can filter by skill!

The new starter report includes all new hires, their contracts, venues, and start dates. It is helpful to run this report if you have hired new staff in bulk and want to see all their details in one place.



New Starter Report

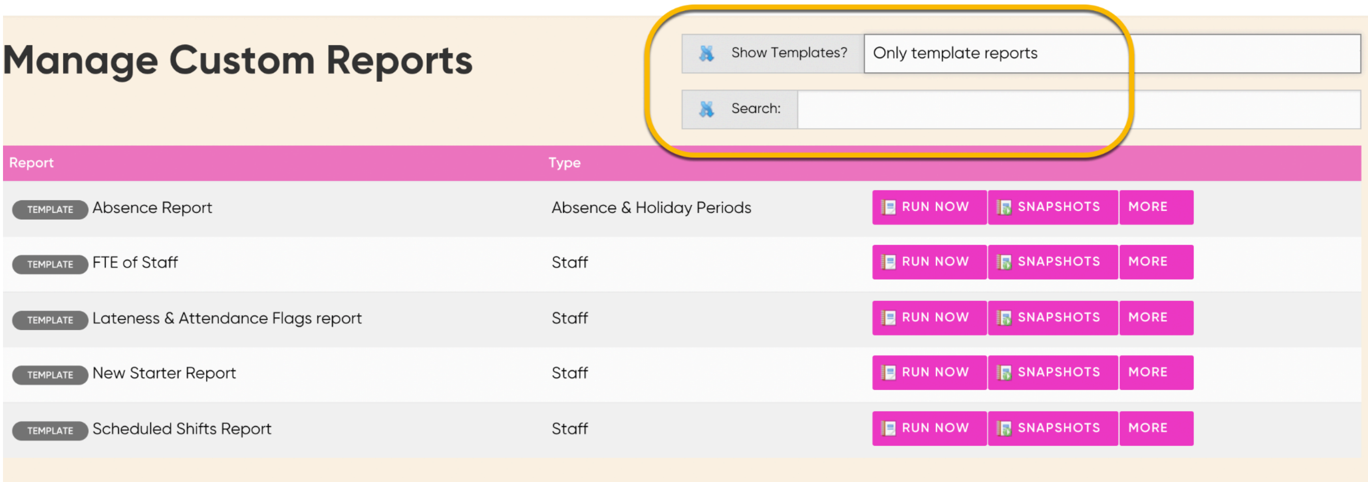
Start	06/05/2025
End	13/05/2025
Default Skill:	All Skills

RUN REPORT

Staff Member	StaffSavvy ID	Contract	Primary Contract Pay	Contracts	Start Date	Home Venue	Additional Venues	Level	Line Managers	Skills	Skill Pay Rates	Email Address
Aaron Grafton	0000558	Casual Staff (5 Hours)	Hourly	Casual Staff (5 Hours)		Venue Uno	Momentus Elite	Freelancers	Alan Meyer, Alex Huntley, James Hodgetts	Bar Crew, Duty Managers Bar, Duty Managers Door, FOH Manager, Steward, Tour Guide, Usher	1.00	
Abigail Camps	0000749	Casual Staff (5 Hours)	Hourly	Casual Staff (5 Hours)		Venue Uno	Momentus Elite	Freelancers	Alan Meyer, Alex Huntley, James Hodgetts	Cloakroom, New Staff	1.00	abbie@smartblue.co.uk

The Scheduled Shifts Report includes fields like venue, scheduled shifts/hours, and the staff member's next shift. It also includes their access level, managers, skills, pay rate and email address. The Lateness & Attendance Flags report allows you to see each staff member and how many times they have been filed under each attendance flag. The absence report shows staff and any recorded absences. The FTE equivalent shows staff, their venue, and their FTE value.

In addition to our search by name filter, there is now also the filter option to only see created reports or our template reports.



Manage Custom Reports

Show Templates?	Only template reports
Search:	

Report	Type			
TEMPLATE Absence Report	Absence & Holiday Periods	RUN NOW	SNAPSHOTS	MORE
TEMPLATE FTE of Staff	Staff	RUN NOW	SNAPSHOTS	MORE
TEMPLATE Lateness & Attendance Flags report	Staff	RUN NOW	SNAPSHOTS	MORE
TEMPLATE New Starter Report	Staff	RUN NOW	SNAPSHOTS	MORE
TEMPLATE Scheduled Shifts Report	Staff	RUN NOW	SNAPSHOTS	MORE

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

