StaffSavvy

User Guide: New Features & Changes in v2026.1.0

1. Introduction to this release

Welcome to v2026.1! This update brings a huge quantity of improvements across the whole system plus two new features. Departments is a hugely powerful tool for larger organisations that will allow better management of different locations, departments, and business units. It is available for all versions of StaffSavvy as part of your plan.

Analytics Dashboards is a fantastic new visual tool to quickly see the status of your organisation. We're providing template dashboards as a standard feature for all versions of StaffSavvy as part of your plan.
If you wish to build or customise your own dashboards, we're introducing this option as an add-on. It comes as a flat 10% fee on your account costs and allows you complete control over all dashboards. You will be able to pull data from any custom report straight into a graph and control access to the data shown. You can customise graphs shown directly on staff profiles; such as attendance charts, shift statistics and many more.

With all of our releases, we're acutely aware of our client's operational needs and we strive to ensure StaffSavvy can automatically perform the options you need, when you need them. This release includes over 80 client requests; often smaller options which allow you to save valuable time and automate more of your processes. Do read through the full list; you might just spot an option you never knew you needed!

This release also serves as an introduction to the new user experience we are launching across the StaffSavvy web and app. We're excited to bring usability and technical improvements to every aspect of the experience. This is starting small with basic improvements to the iOS/Android app and smaller improvements to the web app. We'll be making larger improvements in the coming releases with the continued goal of making StaffSavvy the best software to manage your complex needs. Stay tuned.

2. Changes to Current Version & Recommended Actions

2.1. Removal of Automatic TOIL Rolling Limit option

The ability to place a contract period limit on automatic TOIL hours has been removed.
This option was briefly available for the last few versions of StaffSavvy however, we have identified a logic issue with how this information will be presented. While the rolled hours would be removed at the end of the rolling limit, this can easily leave a staff member in negative hours. This is due to the fact that automatic TOIL does not have an ‘anchor’ to confirm which hours being used are connected to the hours that were earned. This produced unreliable results when used in real-world scenarios.
If there are further client requests for this process, we’ll further explore the options to enable a limit based on time for automatic TOIL calculations.

Recommended Actions:
If you currently use this option, it will currently continue to function as before. Next time you update the contract or create a new version, it will remove the limit on your TOIL.

2.2. New permissions for adding holiday and absence entries: disabled by default

Following feedback, we’ve moved the permission to manually create both holiday/paid time off and absence time entries and shifts to new permissions.
This allows system administrators or payroll administrators to still have this ultimate option of processing these time entry types but adds the ability to restrict other timesheet managers from these options.
This helps ensure holiday and absence payments are correct and in line with your configured policies.
We’ve opted to make these permissions disabled for all by default as it’s rare to need to manually manage these entries. This means only access levels you explicitly allow to perform this function will be allowed.

Recommended Actions:
If you need the ability to manually add holiday/paid time off shifts OR manually add absence or holiday/paid time off time entries then please review the permissions for the following three permissions (titles might differ slightly to make your system’s language):

- Add Manual Holiday Shifts
- Add Manual Holiday Time Entries
- Add Manual Absence Time Entries

Note that this permission does not affect the ability to edit or remove these entry types. Only create them manually.

3. New Features

3.1. Headline New Features:

Below is a brief introduction to the new features of this update. For a more detailed look into each of these features, go to our 'In Detail' section towards the end of this guide.

3.1.1. Departments

- **Create, edit and manage departments**
  This update has brought a new feature, introducing Departments. Departments is a feature that, if you choose to use it, will interact with many areas of StaffSavvy.
  To use: Go to System > Departments & Venues > Manage Departments. To create a new department, go to the actions bar and click Create Department. It is important as well to allow relevant personnel to view Departments by giving them the following permissions: Departments: Manage & create Departments & Departments: View department details. Permissions can be found under System > Levels & Permissions > Manage Permissions.
- **Create hierarchy of departments and assign venues to a department**
  The Hierarchy page lets you quickly and clearly see the different departments within your organisation and the chain of command. In the Visual manager, each Department has an interactive button. When clicked on, you can edit the Department from here or add an additional chain to the hierarchy.
  Adding a new chain to the hierarchy will automatically appear below the Department you are editing.
  To use: Go to System > Departments & Venues > Manage Departments. In the actions menu in Departments. Once created click to view under Visual Manager.
- **Limit access based on Department**
  Another key element of our Department feature is that you are able to limit access to dozens of feature items based on departments. This allows managers in one department to only edit items (such as forms) that belong to their department. This also applies to dashboard features.
  To use: To first set up access, go to Global Settings and set the default access to Departments. Choose whether the default is access to all assigned venues departments or only their home venue. Which option you choose will depend on how much access each department needs from each other. However, this is just the default and can be changed.

3.1.2. Analytics Dashboards

This is a major new feature which will expand over the next few releases. The analytics dashboards allow you to visualise your data in a variety of charts and lists. They can use data from any of our custom reports and have some pre-build templates to use too.

Template Dashboards are being made available for everyone as part of your existing plan. The ability to create your own dashboards forms our new Custom Dashboards Add-on. You can enable this anytime from your global settings. Custom Dashboards will cost 10% of your existing account costs to use and can be disabled anytime.

- **New Visual Analytics Dashboards**

- **Template dashboards available to use instantly**
- **Add-on: Create your own dashboard layouts with different pre-built blocks and report graphs**
- **Add-on: Add data from any of your custom reports directly into your dashboards**
- **Display Dashboard panels on profile tabs for quick access**
- **Dashboard report graph data uses the same restrictions as your custom reports ensuring managers see the data for their team and not others**

  To use: Go to Reports > Dashboards > Manage dashboards.

3.1.3. Manage Shift Period Improvements

3.1.3.1. Shift Swapping

This option allows managers to easily swap the staff assigned to two shifts at the same time. It prevents warning messages about already working or being over/under hours. The exchange will be checked to ensure that a staff member will never be in breach of the rules if they are swapped over. To swap a shift, simply right-click on the first shift and choose exchange. Go to the shift you want to swap it with and right click to complete the exchange.

3.1.3.2. Override warnings when adding shifts

Previously, if a manager wanted to override a contract warning or availability settings to assign a shift to a staff member, they would need to create an unassigned shift first and then assign the shift to the staff member.
This update means they will receive a warning message popup which will allow them to check an override restriction box and create the shift. It's a much easier process and will save managers a lot of time in these situations.

3.1.4. Scheduled news, alerts and tasks

All news, alerts and manually created tasks can now be configured to publish at a later date. This means you can easily schedule notifications in advance and have them appear (and send notifications) at a specific date and time.

3.1.5. Prior warning on important events

Our triggers now support a prior warning option; this means you can say you want to be notified 7 days before a birthday or the expiry of a training certificate.
Previously you could only be notified on the day it happens so this allows for better planning throughout your processes.

3.1.6. Recruitment Add-on Improvements

We’ve added several great improvements to this section including the ability to set up rejection reasons (so you can easily choose one and report on those reasons) and the ability to create locations for the jobs. These allow you to choose a location for each job and show a drop down list of locations on your portal. This allows applicants to quickly filter the available jobs to the locations they want to see.

3.2. Additional Improvements

In this update guide, we’ve grouped all of the improvements by area. We’ve repeated some of the highlights above in this list to make it easier to see everything relevant to you.

3.2.1. Shifts, Schedules & Deployments

- **Swap shifts on Manage Shift Schedule**
  New ability to exchange shifts between two staff quickly on the Manage Shift Schedule page. Whereas, previously to exchange a shift you needed to click on a staff member's name and the transfer shift box would come up, now it comes up as one of the shift quick edit options.
  To use: Go to Shifts > Manage Shift Schedule. Right click on the shift time and you will see a new edit option comes up, to exchange a shift.

- **Over-ride warnings in Manage Shift Schedule**
  You can now over-ride availability/rule warnings when pasting shifts in Manage Shift Schedule. When you copy and paste a shift to another staff member, a pop-up will appear if the staff member is unavailable to work at that day or time. The pop-up box notifies you of the problem, indicating the staff member has set themselves as unavailable. You now have the option to click the override and assign button to proceed with assigning the shift despite the warning.
  To use: Go to Shifts > Manage Shift Schedule. Copy a shift from another staff member and paste into the relevant staff member.

- **Group staff by primary squad**
  There is now the option to group staff members by primary squad under Manage Shift Schedule. This means that there will be a list of squads and under each squad there will be a list of staff members for who that is their primary squad. This means that a staff member will be listed under one squad rather than multiple, making things easier to manage when scheduling and preventing repeats. The staff members who have not been assigned a primary squad will come up at the top of this listing as Unassigned. Previously, when organising by squad, staff would still be listed alphabetically but you would see their squad listed above their name as well. This new grouping allows you to organise categorically. If you prefer to organise your squads as before you can choose the Single Assigned Squad option.
  To use: Go to Shifts > Manage Shift Schedule. In the actions bar, under Settings, in the group by tab you will see the option to group by Primary squad.

- **Ignore shift restrictions**
  There is now the ability to allow staff members to ignore certain shift restrictions and still take extra/offered/covered shifts. When staff are looking at available shifts to take, it will still show a warning of why it is not advisable to take that shift, but staff are now able to take the shift anyway.
  To use: Go to Shifts > Available shifts > Take shifts.

- **Quickly update expected ratio levels in bulk**
  Once you have set up a ratio you can now quickly update (or disable ratio) between two dates in bulk. You are able to set expected units per ratio between particular dates, which can be helpful if there are certain periods where you are expecting higher levels of customers or items and need to account for that in your ratios.
  To use: Go to System > Departments & Venues > Manage Venues. Then for the Venue you are interested in, under more, select Manage ratio. There is a new option to bulk update expected ratios.

- **Quickly copy Additional Day Data information**
  You are now able to copy additional day data information across multiple days within a month. Now, under the Additional Day/Shift Details page, you are able to copy the event, budget value, cost centre, and additional cost reference. You have several copy options, including copying this information to all future days or just dates that have no information already. You are also able to clear the information, if no longer relevant.
  To use: Go to Shifts > Shift Settings > Additional Day/Shift details.

- **More flexibility with nicknames and naming options**
  Ability to choose across printed shifts and deployments to include full names, first names and last name initial or nick names.
  To use: Go to Settings > Configuration > Global Settings > General Configuration. Under Printing Configuration there is now the option to choose the name format to be either; First and Last names, First name and initial of last name or 'known as name' which can be set up via My Account > About me > Edit my details.

- **Schedule Creation: Breaks for shorter shifts**
  You can now ask for a break between shifts of less than 1 hour. Whereas previously the smallest gap between shifts was one hour, this new update allows for shorter gaps of 15, 30, or 45 minutes. In addition to hourly gaps, options now include half-hourly increments (e.g., 1 hour, 1.5 hours, and so on).
  Go to: Shifts > Schedule Creation > Manage Schedule. Then click to preview shifts. New options will appear under the "Ensure a gap between generated shifts" option.

- **Schedule Creation: Templates can check existing shifts**
  When creating a template you are now able to check for existing shifts and only add new shifts if more are needed to match the requirements. If enabled, the system will match the templates to existing shifts. Then, only if the shift does not already exist, will it be added. This allows shifts added as repeating shift patterns to be included in these templates of staff requirements.
  Go to: Shifts > Schedule Creation > Manage Schedule. Click to edit templates from the actions bar and then create a new template. Then enable the option Match To Existing Shifts.

- **Quick Shift Template improvements**
  It is now easier to manage quick shift templates as you can quickly view, edit and copy templates across your current venues. When you go to view your Quick Shift Templates (whilst editing under a Venue Group) there is a copy button when pressed it will allow you to select a different venue to apply this to. Additionally, when you go to edit a Quick Shift Template you also have an option to change the venue, when viewing in a venue group.
  To use: Go to Shifts > Manage Shifts Schedule. In the actions bar click to view Quick Shift Templates. There is now the option to copy or edit a template. To change a template's Venue, you will need to view this under a venue group.

- **Deployments: Quick zoom in on deployments**
  You are now able to use our zoom in feature to make quick adjustments to shorter deployments. If you are using many deployments within a short period, this can help with clarity. You can zoom in on a specific period, edit this section of your deployments and then zoom out again to see the full picture.
  To use: Go to Shifts > Manage Shifts > Shift Deployments. Click manage deployments on the day you are

interested in. At the top of the screen next to the timings, you will see a magnifying glass. Click to zoom in and then out again.

- **Deployments: View staff names assigned to specific patterns**
  Now in deployments you can view staff member names assigned to patterns within a deployment. This is relevant when you have added required patterns in your deployment patterns. Once staff have been assigned to the required deployments, if enabled you will see their names appear under currently assigned.
  To use: Go to shifts > Manage Deployments > Shift Deployments and select Manage on the relevant day. Under options (next to the autofill option) there is the option to show assigned staff members. It is worth noting that this option will only appear if you have deployments added in the deployment planner.

- **Deployments: Templates prioritise required places**
  When auto-filling across multiple templates, all deployment patterns that are required will be filled first.
  To use: Go to shifts > Manage Deployments > Shift Deployments and select Manage on the relevant day. Select autofill empty patterns and it will apply automatically. It is worth noting that this option will only appear if you have deployments added in the deployment planner.

- **Deployments: Customise the Equal Spread of Deployments Timeframe**
  New ability to customise the Equal Spread of Deployments Timeframe from one month. Once enabled, when allocating deployments, the system will look at past deployment patterns from this chosen period of time to ensure a fair and equal spread of deployments. The timeframe the system will review will be from between 2 weeks and 2 months.
  To use: Go to System > Departments & Venues > Manage Venues and edit the venue you are interested in. Go to the Shift configuration tab and into the Deployments section and enable the Equal Spread of Deployments Timeframe option.

- **Deployments: Ability to set the default length of new deployments**
  You can now set up a default length for any new deployments. This means that whenever you add a single deployment, when managing shift deployments, it will default to the set length. The length can be between 10 minutes and up to 4 hours.
  To use: Go to System > Departments & Venues > Manage Venues and edit the venue you are interested in. Go to the Shift configuration tab and into the Deployments section. Set the length under the Default length of a deployment option.

- **Deployments: Share planner templates across venue groups**
  A helpful new deployments feature is the ability to share planner templates across your venue groups.
  To use: Go to Shifts > Manage Deployments > Deployments Planner. Edit Planner Templates > Create a Template. There is a new option to share across a venue group or across all venues.

- **Deployments: Print deployments by Pattern**
  There is a new deployment print option that allows you to be able to print deployments by pattern. This means that the print format will include pattern names and will also group patterns together.
  To use: Go to shifts > Manage Deployments > Shift Deployments and select Manage on the relevant day. Then from the actions bar go to print options and you can now select print by pattern.

- **Deployments: Convert a custom deployments into a pattern**
  When creating custom deployments for a shift, you can now save these deployments into a new pattern or over-ride an existing pattern. You will also be able to give this new pattern a title.
  To use: Go to shifts > Manage Deployments > Shift Deployments and select Manage on the day you want to add shifts to. Add deployments as usual. Then under the choose a pattern option, next to each staff member's name there is a new option to save a pattern.

- **Shift time format now in sync**
  The shift times on Manage Timeline will now match the account time formatting preferences (24 hour vs 12 hour). This is to make your view clearer and to avoid any confusion around shift times.
  To use: Automatically updated. To view, go to Shifts > Manage Shifts. Click the View button and select the Timeline view.

- **Shift Details page reorganised**
  The shift details page has been reordered so event information is shown just below your default shift information. You can also see your colleagues for the shift on the right of the page.
  To use: To view a staff member's shift details go to their profile and go to their shifts tab and click the shift times of the shift you are interested in.

- **Shift Listings report includes shift details**
  The shift listing report now directly links to the shift details pages for each shift. This makes it easier to quickly navigate to see shift details when reviewing this report.
  To use: Go to Reports > Shift Reports > Shifts Listings. Click on the shift times and you will be taken to the shift details page.

- **Cancelled shifts reasons added to reports**
  When a shift has been cancelled you can now save the provided reason against the attendance notes on the shift for later reporting. This can be viewed when creating a custom report, if you choose to add the Shift attendance notes column. When you run your report the reasoning will appear here and can also be viewed in the summary.
  To use: Go to Shifts > Manage Shifts > Grid View. Click on a shift to cancel and leave a reason. Then create a custom shift report.

- **My Next Shifts links directly to the shift details page**
  It is now easy to quickly access the shift details page via your Dashboard. Click on the shift times of upcoming shifts and it will direct you straight to your shift details.
  To use: Go to the Dashboard. Under Shifts you can now click on the shift times of the shift you are interested in. This will take you to the shift details page where you can see any upcoming shifts.

- **Schedule Creation & Deployments: Repeat every six weeks option is now available**
  When you are creating your schedule, there is a new repeat option where you can repeat your deployment template or shift template every six weeks.
  To use: To use with your schedule go to Shifts > Schedule Creation > Manage Schedule. Then, under the 'Add Template to Schedule' options, in the repeat box you can now select 6 weeks as a repeat option.
  For Deployments go to Shifts > Manage Deployments > Deployment Planner. Under the option to 'Add Planner Template to Schedule' you can now select 6 weeks as a repeat option.

- **Cover Report highlights hidden shifts**
  The cover report showing which shifts still need to be filled will now show all shifts and include a warning if the shift is hidden (so staff would not be able to take this shift)
  To use: Available always

3.2.2. Staff member profiles

- **Set primary squad for each staff member**
  In a similar way to how staff have always been able to have a primary venue, this update gives you the ability to set a primary squad for each staff member. This means staff can be in multiple squads but you can set their main squad.
  To use: Go to Staff > Staff Settings > Staff Squads. Then at the bottom of the page under the list of squad members, you will see a tick box where you can set the primary squad.

- **Send personal messages to a whole squad**
  This permission allows you to send personal messages to a whole squad or a squad's leaders. This is covered by a new permission which is not enabled by default. You can send a message to your own squad or squad leader or another squad.
  To use: This permission can be found under System > Levels & Permissions > Manage Permissions and enable the 'Squads: Personal Message to Squad' permission.
  Then to send a message go to Staff > Staff Settings > Go to either My Squad to message your squad or Manage Squads, where you can view other squads. Once you are viewing a squad there are the options to message the squad or message the squad leader in the actions menu.

- **Improved Data Field changes**
  Under the Updated Details Report, previously you would click to acknowledge details that had been changed and see all the fields, without being clear which fields had been changed. Now, when showing a data set that requires acknowledgement, the system will highlight the field(s) that have been added or changed for greater clarity.
  To use: Go to Reports > Staff Reports > Updated details report. Click the details you want to acknowledge or confirm and you will see the highlighted fields. The highlighted fields will have a pink pencil icon to indicate this.

- **Improved Archive Account popup**
  This update has made several improvements to the pop up confirmation box that appears when you try to archive an account. These improvements include options to cancel or reassign shifts and set a leaving date which will affect all contracts and jobs.
  To use: These new options will appear automatically when you go to archive an account, which can be done by going to a staff member's profile and selecting archive account from the actions menu.

3.2.3. Documents, Records and Forms

- **Bulk assign different document types**
  There is the added ability to bulk assign digitally signed documents, contract documents or personal records to cohorts of staff.
  To use: First you must enable the permission "Bulk assign documents, contract documents or personal

records". Then go to System > Documents & Forms > Bulk Assign Documents.

- **More details available for Performance and Welfare forms**
  The profile page now provides more detail on Performance and Welfare forms issued to staff. When viewing a staff member's personal record under the Welfare & Performance tab, you will now see the date and time the form was issued, and, if relevant, the name of the person who issued the form.
  To use: Go to a staff member's profile and go to their personal record tab. It will appear under the Welfare & Performance tab.

- **Staff limited ability to add Work Eligibility**
  Work Eligibility documents can no longer be uploaded by a staff member if the work eligibility feature has been disabled.
  To use: Go to Settings > Configuration > Global Settings > Features > Disable Employment Eligibility.

- **Staff Skills Mail Merge**
  New ability to include staff member's skills within a record, document or contract document. This is a section of dynamic content that, if included, will list all skills that have been assigned to that staff member.
  To use: Go to create a new contract document, (via Pay > Contracts > Contract Documents) record (via System > Documents & Forms > Personal record templates) or document (via System > Documents & Forms > Manage Document Types, create new document type with either digital document types).
  Use the tag shown for skills (which will be customised to your system language) or the universal [groups] tag.

- **Welfare & Performance Form report now includes follow up form details**
  This is an update to welfare & performance forms allowing you to edit follow up form details, including the ability to remove the form or set a new date.
  To use: To set up a follow up form, first go to System > Documents & Forms > Manage performance and welfare forms. Then under Schedule Follow Up? Choose to automatically schedule a follow up form. Then once the form has been assigned and a follow up is scheduled, go to a staff member's profile > Personal record > view the original form and then when you view the document, you can also view the follow up form. These can also be edited.

3.2.4. Holiday, Absence & TOIL

- **Compressed TOIL approvals**
  There is now a compressed TOIL approval when a staff member is claiming back for multiple hours on the same day. When a staff member has submitted several TOIL requests in a single day, now when a manager goes to review and approve TOIL all the TOIL requests appear together under one TOIL request rather than a list of requests. This makes it clearer to see what date a TOIL request is for. You can then either approve the total requested hours or show each request to edit.
  To use: Go to Dashboard > View TOIL requests. The unapproved request will appear as normal but with all the hours for that day grouped together. You can then either approve the total requested hours or select the button 'show each request to edit' for more detail and adjustments.

- **Rolling absence calculations**
  New ability to calculate absence entitlements on a rolling basis of 3 or 4 years (in addition to the existing 1 and 2 year rolling options).
  To use: Go to Systems > Absences and Breaks > Manage Absence policy. Edit or Create policy set. Create policy. Under calculation duration, you can select calculate as a rolling total. The length of time now goes up to 48 months.

- **Require absence categories**
  You have the ability to make categories on absence reasons a required field throughout. This means that an absence must have a category set or you will not be able to add the absence.
  To use: Go to System > Configuration > Global Settings > Staff & Contracts > Scroll down to the Absences tab and enable the 'Require categories to be set if they are available' option.

- **Option for additional holiday entitlements to only be requestable by managers**
  We have added the ability to make additional holiday entitlements only requestable by managers. Staff Members will not be able to submit requests for any absence type where this option is enacted. This applies to additional absence reasons you have created, such as maternity or training. This will only go into effect once you disable the allow self requests option under each relevant reason.
  To use: Go to System > Absence and Breaks > Manage Absence Reasons & Policies. Create a new absence reason. Select the 'No do not allow under the Allow self-requests' option.

- **Show only direct reports for Holiday reports**
  Under the Approved Holidays Report and the calendar feed you can choose to only see holidays from staff who are reporting directly to you. This is to align this report to other absence views and reports.
  To use: Go to Reports > Staff Reports > Holiday/Time off Report. In the top right corner there is the option 'Showing all staff I have access to'. Click this and select view direct reports only.

- **Reposted shifts keep same status**
  Reposting shifts when approving a holiday will maintain their current status rather than being instantly available to cover. This means if the shift was hidden or locked, it will remain hidden and locked.
  To use: No action needed, this is an improvement to an existing process.

- **Absence policy using max working days**
  Absence policies will now take into account the max working days a week setting. Previously, when you used a contract with a fixed holiday and a simple calculation, the system would deduct all 7 days, no matter what the maximum working days were. Now, if you have the max working days set to max 5 days a week, the absence will be limited to include only 5 days in that week.
  To use: Go to Pay > Contracts > Manage Contracts > Under the holiday tab select, Fixed yearly entitlement with the simple calculation method. Then select the Maximum Days per week. Then, go to System > Absence and Breaks > Manage Absence Reasons & Policies and add a new policy. This only applies when the Contract is using fixed yearly entitlement with a simple calculation.

- **Absence category viewable for approval**
  When reviewing/approving an absence you will now have the ability to see the selected category for absences. Previously the absence type would appear but not the category. For example, previously an absence might come up as Sickness, whereas now it would show Sickness: Ear ache

To use: To see this go to your Dashboard, review any absences waiting to be approved in your notifications. Absence category viewable automatically, no action needed.

- **Change Bradford Factor labels**
  You can now adjust the Bradford Factor threshold labels to customise them for your organisation's preferences.
  To use: Go to System > Configuration > Global Settings > Staff & Contracts. Scroll down to the Absences section*.*

- **Change the number of weeks per year**
  Added ability to set the number of weeks in a year to 52, which better calculates FTE and annualised hours in some situations. By default it will be set to 52.1429 weeks but can be changed to round down to 52 weeks.
  To use: Go to System > Configuration > Global Settings > General configuration. Then under your organisation settings you can choose the Year Length in Weeks option.

3.2.5. Time Entries, Pay & Expenses

- **New Manipulation Rule Options**
  There are two new manipulation rules:
  The first is the ability to choose a fixed duration for an additional time entry that will run alongside the original time entry.
  The second is the ability to round the paid duration of this time entry (or segment of time entry) up to the nearest X amount of minutes (going up in five minute intervals).
  To use: Go to Pay > Contracts > Manipulation rules. The second change comes under Additions. After you select a pay element to add the option to, you can select the length of the paid duration of the additional, overlapping time entry.
  The second change comes under changes to time entries where there is the option to Round Paid Duration Up.

- **Total Hours options on the Weekly Time Sheet**
  When viewing the weekly timesheet, there is now a Settings option in the actions bar. This gives you the ability to choose whether you want to view contracted hours, paid hours or worked hours whilst reviewing your timesheet.
  To use: Go to Pay > Weekly Timesheet. You can see the new layout of options in the actions bar.

- **Wage sheets & Wages Reports permission supports restriction by line managers**
  The Permission to view full wage sheets of all staff and export the information into various formats can now be restricted by Line Managers. This means you can restrict wage reports so that only the relevant line manager is able to view that information. To utilise this feature you will need to give permission to the entire level, i.e. all line managers. Then under the edit access button you will see two additional options. One option allows you to block the access level from viewing their own information, so that if this is blocked they would only be able to edit others information but not their own. The second option allows you to block access to information from access levels below them. Additionally, you are able to set it so that only a Direct Line Manager is able to view the information. This would restrict information so that only directly relevant personnel had access to Personal Data information.

To use: Go to System > Levels & Permissions > Manage permissions. Select the Wage sheets & Wages Reports permission. Under this permission, you will see that it will automatically say Line Manager enabled. Give permission to an access level and then select edit access to make adjustments.

- **Manually add holiday and absences**
  There are now two separate permissions to manually add holiday and absence time entries to prevent misuse or user error. We have changed the set up so that, by default, these permissions are disabled. What this means in practice is that managers are no longer able to manually add holiday shifts, absence time entries and holiday time entries on Week View by default. This also applies to the Weekly Timesheets page. This is to prevent staff from following the wrong process and adding incorrect time entries.
  This permission can then be enabled so that the correct personnel who manage absences have access. This permission can also be set so that only direct line managers have permission to add holiday and absences, so that they only are able to manage this for their own staff members. This new option is useful for organisations wanting to separate management functions and ensure only specific personnel are able to add and manage absence. This permission is suggested to be used by senior admins.
  To use: Go to System > Levels & Permissions > Manage permissions. The two new permissions are Add Manual Holiday Shifts and Add Manual Absence Time Entries.

- **Unprocessed pay now has new options.**
  There have been several changes made to the unprocessed pay page to improve functionality. Also, Unprocessed pay now includes custom absence type icons and sickness icons to make them easier to see. Also, we have separated out breaks so that you are now able to see both paid and unpaid breaks under the same column. This makes it clearer how long the break was, whether it was paid or unpaid. It allows you to choose to see each cost code, difference in hours, skill and event information.
  To use: Go to Pay > Unprocessed pay to view changes. In the actions bar there is a new Settings option. Click to change view options.

- **Weekly Timesheets pay items**
  Pay items are now also displayed on weekly timesheets along with time entries. This allows you to quickly view and approve all items in one place a week at a time.
  To use: Always on.

- **Daily review now includes skill and both paid/unpaid breaks**
  Improvements to the information provided within daily review; now the list of time entries to approve includes the skills and both paid/unpaid breaks (instead of just paid).
  To use: Always on.

- **Clock in screen improvements**
  There have been various improvements which should enable faster and more resource-efficient clock-in screens. You might not notice them immediately but this should help ensure a speedy experience across your system
  To use: Always on.

- **The system automatically locking start/end times of time entries when they are back to back has been suspended pending review**
  In some situations, the system would previously “lock” the start or finish times for some time entries if

they were back to back with other time entries. The idea was to prevent overlaps and other issues. We are currently suspending this option with the view to removing it permanently.
To use: Nothing to do. Please provide us with any feedback you may have on the suspension of this feature.

3.2.6. Contracts, Contract Restrictions & Manipulation Rules

- **Contract Minimum Pay**
  This feature allows you to automatically pay a certain number of hours or pay items per contract period each month. The system will automatically check how many hours have been logged and then add the difference. The additional units can be added as the same pay element or different allowing for deductions from salary for doing fewer hours than expected. This can also be used to automatically pay allowances each contract period.
  To use: Go to Pay > Contracts > Manage Contracts. Under the More button next to a contract you will see the option to add Minimum Contract Pay. Then click to add a minimum contract pay option.

- **Display rolling or currently used hours figure**
  There is now the ability to display a rolling or currently used hours figure from a contract restriction on staff profiles and remote clock in pages. This is helpful for record keeping and allows you to show staff members how they are doing against weekly, monthly or any fixed-period limits on hours.
  To use: To set up go to Pay > Contracts > Restriction rules > Create new restriction rules. Then under Display Restrictions select Display restriction and current status. Then you can view this under Shifts > Remote clock in.

- **Reporting on a contract restriction**
  New ability to report on a contract restriction on a contract level. This means you can now see how staff are placed against the restrictions in place.
  To use: To set up go to Pay > Contracts > Restriction rules > Create new restriction rules. Then under Display Restrictions, ensure you select Default: Total restriction hours. Then go to Pay > Contracts > Contract Hours Report.

- **New Contract Restriction: ability to limit the 'operating' hours per day.**
  In contracts you can now limit your operating hours. This is the maximum number of hours you want from the start of the first shift to the end of the last shift (where the shifts start on the same physical day). Once set, contracts will not be able to allow shifts outside of these hours unless exemptions are created.
  To use: Go to Pay > Contracts > Restriction rules. Create a new restriction. Under restriction type there is a new option, Limit of operating hours per day.

- **Linking/unlinking contract documents to contract records**
  The system now allows you to remove or attach documents to contract records to ensure your records are linked correctly.
  To use: Go to the Pay > Contracts > Contract Document report. View the contract document you wish to link or unlink. View the document and use the option in the actions menu at the top of the page to review existing links or add a new link to a contract.

- **Contract documents supports FTE values (contract full time equivalent)**
  This update now allows you to use FTE values for contract documents. When creating a new Contract

Document, when adding the dynamic content that will go into your template, and pull in information from the StaffSavvy data, we have now added a block that allows you to add the FTE value for the relevant contract.
To use: Go to Pay > Contracts > Contract Documents. Create a new contract document. Under the dynamic formatting options there is now the option [contract fte]. If you include this block, you will be adding the FTE value for this contract .

- **Bulk assigning contract documents using current contract**
  You can now assign contract documents in bulk, as well as being able to filter by current contract which allows moving staff members to a new contract quicker and easier. When bulk assigning a contract document, there is the option to only assign to certain contract levels, so you are able to assign a contract document to a specific contract in one click.
  To use: Go to System > Levels & Permissions > Manage Permissions > Bulk assign documents, contract documents or personal records. Enable this permission. Then go to System > Documents & Forms > Bulk Assign Documents. Under the filters tab, select which contract you want the contract documents to be assigned to.

- **Updating Job end dates**
  It has been made much easier to update job end dates when editing contract records. The system will intelligently offer to update job end dates when editing attached contracts or adding new contract records.
  To use: Go to a staff member's profile and then from the actions menu, select Edit Details > Manage Contracts. If there is a Job attached with this contract, below the expiry date option, there will be an additional tick box you can choose for if you want to update the Job expiration date to match the contract expiration date.
  For this option to appear, the staff member must be assigned to a Job and that Job must have an expiry date. This can be managed under System > Staff Data & Processes > Manage Jobs. When you create a Job ensure you have added an expiration date.

3.2.7. Training, Exams & Resource Library

- **Ability to disable Most Viewed Items**
  You can now disable the most viewed items options in your resource library, if you want to add this as a privacy feature.
  To use: Go to Settings > Configuration > Global Settings. Go to the Features tab. Under the Resource Library section there is a new option to enable or disable Most Viewed Items.
- **Training Certificate filters**
  It is now much easier to manage Training Certificates as you can use the new search bar to search by name. There is also a new filter option to filter by department when looking through certificates.
  To use: Go to Training > Training plan > Manage Certificates. Under the list of certificates, you will see new search features at the top.

3.2.8. Reports updates

- **Refine data in aggregate report columns**
  Powerful new ability to refine the data used in aggregate report columns. For example, if you had created a Total Shifts Worked column, you could now refine this summarised data to only include shifts with specific statuses, such as "Completed" or "Approved," while excluding shifts that were canceled. This will allow for

much more finesse when creating or customising reports allowing comparisons between different contract types or access levels.
To use: Go to Edit Custom Reports. Edit your report. At the top of the page, it will list the columns in your report. If the column supports refining the data, you will see a Refine Data button which will provide you with further options to adjust the data included in that column's total.

- **View summary data for any column**
  New option to view summary data for any column in any custom report. This will show you a count and percentage for each item in a column. This can also be exported to Excel or CSV.
  To use: Go to Reports > Manage Custom Reports. Select Run Report on the Report you are interested in. Then now, at the top of the report, next to each optional column, next to the filter icon, there is a second icon that will show you summary data.

- **New report type for recruitment application responses**
  Whereas previously there was only a single recruitment focused custom report, recruitment positions, you can now create a custom report for application responses. Once you select the report type, you can view all available options to include as report columns. The applicant column is automatically added and locked in by default. You can then choose which other columns to include. Options include adding Answers from a Data Field Question - you will need to select a specific data field. You can also add important dates including Applicant Decision Date, Date the application was received, or the Date of the final hiring decision on the application. Other options relate more to the application, including the applicant's name, applicant number, shortlisting applicant number, the current status, the highest reached status for this application, and the Position Applied For.
  To use: Go to Reports > Manage Custom Reports. Create a new Report. Under Report type, select Recruitment Application.

- **Improved search tools for report columns**
  Search report columns will now search for the options they contain too; this allows you to find the right column quicker. It will also pre-select the relevant option for your search.
  To use: Nothing to do. This should just make it easier to find the column you need for your report.

- **Permission to view generic/overall contract hours reports has been reorganised**
  The permission to 'View generic/overall contract hours reports', no longer falls under the Time entry/pay permission and has been moved to a Contract Hours Report permission to better align with the permission options.
  To use: Go to System > Levels & Permissions > Manage Permissions and select View contracted hours report (inc TOIL). Changes automatically applied.

3.2.9. Triggers

- **Ability to set prior notification on triggers with dates**
  You can now set prior notification triggers for birthdays, length of service durations, contract expiry dates and custom field dates. This means that you can set the trigger to go off a week, a month or even a year before the event or date takes place, which is helpful for actions that need prior preparation. This feature also maintains our encryption standards ensuring personal data is heavily encrypted at rest.
  You can also set a prior notification for a training certificate expiry trigger. Additionally, you can also set a

trigger for prior notification for when a library item expiry dates.
To use: Go to System > Manage Triggers > Triggers > Create a new trigger. Under Trigger details there is now the option to set a Prior Duration.

- **Trigger added when a contract is signed**
  Added ability to set a trigger for when a contract document has been fully signed and completed.
  T*o use: Go to System > Manage Triggers > Create new Triggers. Under the Triggered When… option, select When a Contract Document has completed all required signatures.*

- **Trigger added for logging more than minimum hours**
  Added ability to set a trigger for when a staff member logs more than the minimum hours in their contract period (this is refreshed and checked daily).
  To use: Go to System > Manage Triggers > Create new Triggers. Under the Triggered When… option, select 'When a staff member logs more than their minimum hours level in their contract period.

- **Ability to set a trigger for specific dates**
  A new Triggered When option allows you to link multiple dates to a trigger action. Once you have selected the Specific Date option under Triggered When…, a drop down box will appear that allows you add a date that your trigger action will go into effect. This could be a single date or a series of dates that the trigger action will happen on. This is particularly useful for quarterly, 6-monthly or fixed date triggers.
  To use: Go to System > Manage Triggers > Create new Triggers. Under the Triggered When… option, select 'It is a specific date during the year'.

- **New Trigger for when a resource library item expires**
  There is a new trigger option relating to the resource library. You can now select a trigger that will go into effect when a library item is new or has expired.
  To use: Go to System > Manage Triggers > Create new Triggers. Under the Triggered When… option, under the Resource Library section.

3.2.10. Alerts, News & Tasks

- **Ability schedule alerts, news and tasks for later publication**
  You can now schedule alerts, news and tasks for later, staff members can't see the item until the published date and time. There is a new option when creating alerts, news items or tasks called publish now, which allows you to set a date for when the item goes live.
  To use: Go to Staff > Alert > Create Alert. Under create an alert you will see a new option called publish now. Here you can set the date you want to publish. This applies the same way when creating news and tasks. To do this go to Staff > News > Create News item OR Staff > Create Tasks.

- **Ability to filter recipients of a task by assigned contracts**
  When creating a task, you can now filter who will be assigned the task by contract. This means you can assign the task to only certain contracts, which can be helpful if you want a task assigned to everyone with a permanent contract, but not your casual or freelance staff.
  Go to: Staff > Create Tasks. Under the filters options go down to the 'With these contracts' tab and choose the contracts you want to be included.

- **New weekly email for notifications**
  We have introduced a weekly email (enabled by default) that lists the notifications on each account including tasks, deadlines in tasks in the next 7 days and all approvals.
  To use: Automatically enabled, each staff member can disable under their notifications.

- **View upcoming tasks for that week**
  My Tasks now has a dedicated view for all tasks due in the next 7 days. This helps to see tasks that need to be completed within the week, to help staff prioritise.
  Go to: My Account > My Tasks. In the View action bar, there is an option to view tasks with a Deadline within 7 days.

- **Increased character count for multiple choice options in Alerts**
  You can now use 250 characters for multiple choice answers on Alerts. This is more than 5x the number of characters and allows you to create more and add more detail to your options for alerts.
  To use: Go to Staff > Alerts > Create Alert. Under the 'Ask a question?' option, where you set what response you require from the personnel who are receiving the alert, select multiple choice. You automatically will have an increased character count.

- **My Messages supports images**
  You can now attach images directly into messages.
  To use: Simply use the image icon in the text editor when creating or replying to messages.

3.2.11. Integrations

- **iHasco courses automatically assigned**
  iHasco courses can now be automatically assigned to staff members based on their assigned certificates. You can now assign courses in iHasco based on assigned StaffSavvy Certificates. This will only work if you have the correct licensing in iHasco.
  To use: Go to System > Configuration > Global Settings > Integrations. Then go down to the iHasco tab. There is a new option allowing you to assign courses in iHasco based on assigned StaffSavvy Certificates.

- **MapalOne: Only sync staff with signed contract**
  MapalOne account sync can now be set to only sync staff members who have a signed contract in place.
  To use: Go to System > Configuration > Global Settings > Integrations. Under the MapalOS/ Flow Learning tab go to the Sync all accounts? Options. Here you can now select the option to only sync accounts once they have signed a contract document.

3.2.12. Recruitment Add-On

- **Rejection reasons**
  You can now create rejection reasons and select them when rejecting an application. This helps standardise rejection reporting.
  To use: Go to Recruitment > Manage positions > View application. Then when making a decision, or rejecting an application, you will see the option to select a rejection reason. To create a rejection reason go to Recruitment > Settings > Recruitment reasons and create a new reason.

- **Create locations and assign positions a location.**
  When creating a position you can now assign that position a location. Once set up, the location will appear at the top of the position page in the recruitment portal. Optionally you can display these with a filter option on the public portal. This helps standardise Indeed integration too.
  To use: To set up locations go to Recruitment > Settings > Locations. Create a location. Then to assign a location, go to Recruitment > Manage Positions > Create Position. Under the location tab you can choose between the locations that have been set up.

- **Applicants can see position details**
  Applicants can now view the details page once they have started an application for a position. Previously, if the job position on the portal was link only (not viewable on the main portal), after the person had applied to a position they would then no longer be able to see the position. The update has changed this so that you can still see the job position after applying.
  To use: Automatically applied when viewing a job in the application portal.

- **Show if an applicant misses an interview**
  Applicants can now be marked as having missed their interview slot, to help create clarity in your interview process. Once they have been marked as having missed an interview, the application decision becomes a missed interview and they will no longer be an active applicant unless you re- invite the applicant for an interview.
  To use: Go to Recruitment > Manage positions > View all applications under the relevant positions. Click to view the specific applicant's application. Under the decision button there is an option to select Missed interview. They will be removed from active applicants and will appear under All Applicants. Then, if you view their application, under the Force Decision button you can either rebook or invite the applicant to a new interview.

- **Positions show pending and accepted offers**
  Under positions, you will now be able to see pending offers and accepted offer counts. Previously, you could see rejections and the number of applicants shortlisted but not those under offer.
  To use: Go to Recruitment > Manage positions > Then under the shortlisting column you can see the number of offers that have been made in a blue bubble.

- **Positions now show if they have been sent to Indeed too**
  You can now see if a position has been added to Indeed as well. If, when creating a new position you have added it to your Indeed portal you can now see this under manage positions. This is to make it clear what positions are active and where.
  To use: Go to Recruitment > Manage positions. Next to each live application you will be able to see if it has been linked to Indeed.

- **Scoring form scoring points can be longer**
  Scoring form points can now be much longer. They are no longer limited to 500 characters for their instructions and can be extremely detailed.
  To use: Go to Recruitment > Forms > Scoring Forms. Create a scoring form and add a scoring point.

- **Scoring points can be weighted**
  In this update scoring forms now support weighting against each scoring point. This means that certain

answers can be given more weight. This is helpful for where you have some items that are more important job requirements that need to be taken into account.
To use: Go to Recruitment > Forms > Scoring Forms. Create a scoring form and add a scoring point. Next to the scoring point, click the more button and select weighting.

- **More detail exporting application forms**
  Now, when you are exporting application forms they also include the date of the employment offer and a date of decision by the applicant.
  To use: Go to Recruitment > Manage positions > View applicant who has been offered a position. Under Download in the actions bar, select Download full application.

- **Export interview application forms to PDF**
  New ability to export all application forms for an interview session to PDF. Once downloaded you will be able to see relevant information about the applicants. Previously, you could only export this information as an excel file or for all applicants.
  To use: Go to Recruitment > Manage positions > Click to view active applicants. Under the interview sessions, choose a session. There is now the option to download the applications for that session.

- **Run applications as a custom report**
  Application forms can now be run as a custom report giving access to multiple-positions in a single report. This allows general application information plus the provided answers to data field questions to be all together in one place. Some columns you are able to add in this report type include, Position applied For, Applicant name, number and status. Under the Answer from Data Field Question, you are able to see the answer provided to a question that is based on a data field and you can choose from all set up data fields which can be helpful when wanting to see a wider picture of your applicants.
  To use: Go to System > Reports > Manage Custom Reports. Create a new custom report with the report type Recruitment Applications. Add any relevant columns and data fields.

- **Check if applicant is an existing staff member**
  New ability to see if the applicant is an existing staff member (based on their email address). If they are (or were) a member of staff you will be able to see whether they are a current staff member and will receive a link to their staff profile and any onboarding steps they have completed.
  It is important to note that this option is only viewable when you are not part of the shortlisting process.
  To use: Go to Recruitment > Manage positions > Click to view all applicants on the position you are reviewing. Then click to view a specific application. Below the decision box where you can find portal login information, there is also information about whether they have been or are a staff member.
- **Ability to score applications out of 3 (in addition to out of 5 or out of 10)**
  When scoring an applicants' application forms, hiring managers can now score applications out of 3 (in addition to out of 5 or out of 10). This method allows the shortlisters to provide a score for each answer within each blinded application. By increasing the scoring scale there can be more nuance and precision when scoring.
  To use: Go to Recruitment > Manage positions > Create new position. Under the shortlisting method, you can select Score answers out of ten.
- **Applicants can withdraw applications**
  In the applications portal, when choosing an interview slot, applicants can now withdraw their application rather than making a choice.

To use: Applicants will need to view their open applications and click to book an interview. On the page that shows all the open interview slots, in the top right hand corner there is the option to withdraw an application.

- **Remove draft decisions**
  There is a new ability to remove draft decisions and set them back to a 'No draft decision', if a draft decision has been made in error. This applies to scorers or decision makers. If you put a draft score or draft decision in you can now undo it.
  To use: Go to Recruitment > Manage Positions > View all applications for the role you are a decision maker for. When you click on a specific application there is the option to Draft: Remove suggestion.

- **Applicant and Scoring forms can now have draft versions removed**
  With this update, you are now able to remove different draft versions of scoring forms. This is helpful if this draft was made in error.
  To use: Go to Recruitment > Forms > Scoring forms. Under Manage scoring forms, create a new draft. Then under more, there is the option to Remove the current draft.

3.2.13. Security / Policies

- **Set maximum days for computer to remember user**
  New ability to set the maximum 'remember me' duration. If using SSO or the option to stay logged in, this option is where you will set the number of days that the user can be logged in for up to for the system. The default is now 90 days before requiring re-login.
  To use: Go to Settings > Configuration > Global Settings > SCIM & SSO > Select Stay Logged In Duration.
- **Set valid MFA duration**
  If using email or device-based Multi Factor Authentication codes, this new option allows you to set how long the user will be remembered on that device. This defaults to 30 days before requiring re-validation, but can be set to as little as five days.
  To use: Go to Settings > Configuration > Global Settings > SCIM & SSO > Under the Email/Password Login section, select the number of days you want MFA to remember a user under MFA: allow don't ask again for.
- **Added support for FQDNs within IP restrictions**
  There is now more support for Fully Qualified Domain Names (FQDN), whereas previously staff would be blocked from receiving an email log in if they were using an FQDN, now it will let users login as long as this is compliant with IP restrictions.
  To use: Automatically applied.

3.2.14. Interface Improvements

These improvements are the first step in a wide-ranging improvement program which will see an improved user experience across StaffSavvy. We'll be introducing these improvements over the next few releases in a careful manner to help all users have a great experience.

- **New Filter Toolbar with memory**
  We've created a new filter and search bar which is being rolled out across many of the management pages. This bar includes filtering for the new departments feature and better multiple-choice filtering for categories.
  We've also added memory to the filters so if you view another page and then come back to the filtered

page, it will remember which options you were filtering and which page you were on. This will reset when you next login.

- **New panel design on homepage**
  We are updating the panel designs on the dashboard homepage to improve the user experience. This includes ensuring the elements work better on smaller screens and reducing the space wasted for buttons. The review also includes improved accessibility coding.

- **New grid layout for manage training certificate completion**
  We have updated the structure of the manage training certificate completion grid with the aim of improving its user experience on smaller screens or with teams that have large numbers of certificates. This allows the screen to better present the information for all users.

3.2.15. iOS/Android App Improvements

Note: these improvements are included in the latest version of the app which is published separately to this release. The release notes are included here for your reference.
These improvements are the first step in a host of upcoming improvements to the app which are designed to make it quicker, easier and more responsive for all users.

- **Improved notification process**
  This update includes improved push notifications which will automatically open the correct page within the app when selected.
- **Improved app controls**
  We've improved the interface within the app, bringing quick links to common pages straight into the navigation of the app. This means access to shifts, remote clock in and more are now easily accessible from all pages.
- **App Colour Scheme**
  The colour scheme will update automatically based on the StaffSavvvy colour scheme on the staff member's profile. This includes the high-contrast scheme and dark scheme.
- **Improved settings page**
  We've vastly improved the settings page design and interface to make it easier and clearer to use.
- **Improved multiple instance management**
  If your team members work in multiple organisations using StaffSavvy, we've improved their ability to view and swap between each instance of StaffSavvy they need to run. It's now clearer which instance they are using and quicker to see which account they want to swap to. The app supports unlimited different StaffSavvy instances.

4. In Detail...

4.1. Departments

Departments are our newest feature. So what are they? They are an organisational feature that, if you choose to use it, will interact with many different areas of StaffSavvy. This new feature has been designed to create a clear structure within your company by allowing you to do the following things.

4.1.1. Establish a Hierarchy

You can create a visible chain of command amongst different Departments in your organisation that might have different functions. The Hierarchy page lets you quickly see this structure. Managers are able to add new chains to the hierarchy using the interactive buttons in the Visual Manager.

4.1.2. Assign Venues

You can assign your different office spaces (venues) to a specific Department. This allows each Venue to belong to a Department, helping separate venues in companies that require organisational separation. Because of the way the hierarchy works - if you assign an asset to a department it will be viewable by that department and also any departments above it within the hierarchy.

4.1.3. Limit Access

A key element of Departments is the ability to limit access to features and items based on departments. Many items in StaffSavvy can now be assigned to a specific department and if enabled can only belong to a single department. This applies to many items in the system including Welfare and Performance forms, Contracts, Messages, Tasks, Alerts, Triggers, Certificates, Exams, Awards, Venues, Document types, Skills/Roles, Shift tasks, Tasks, News, clock in locations, personal records, recruitment positions, recruitment forms, training programs, steplists, case types, assets, & shift ranges.

This ensures managers in a department can only view and edit items that belong to their department, streamlining management and security.

4.1.4. How are Departments different from Venue Groups?

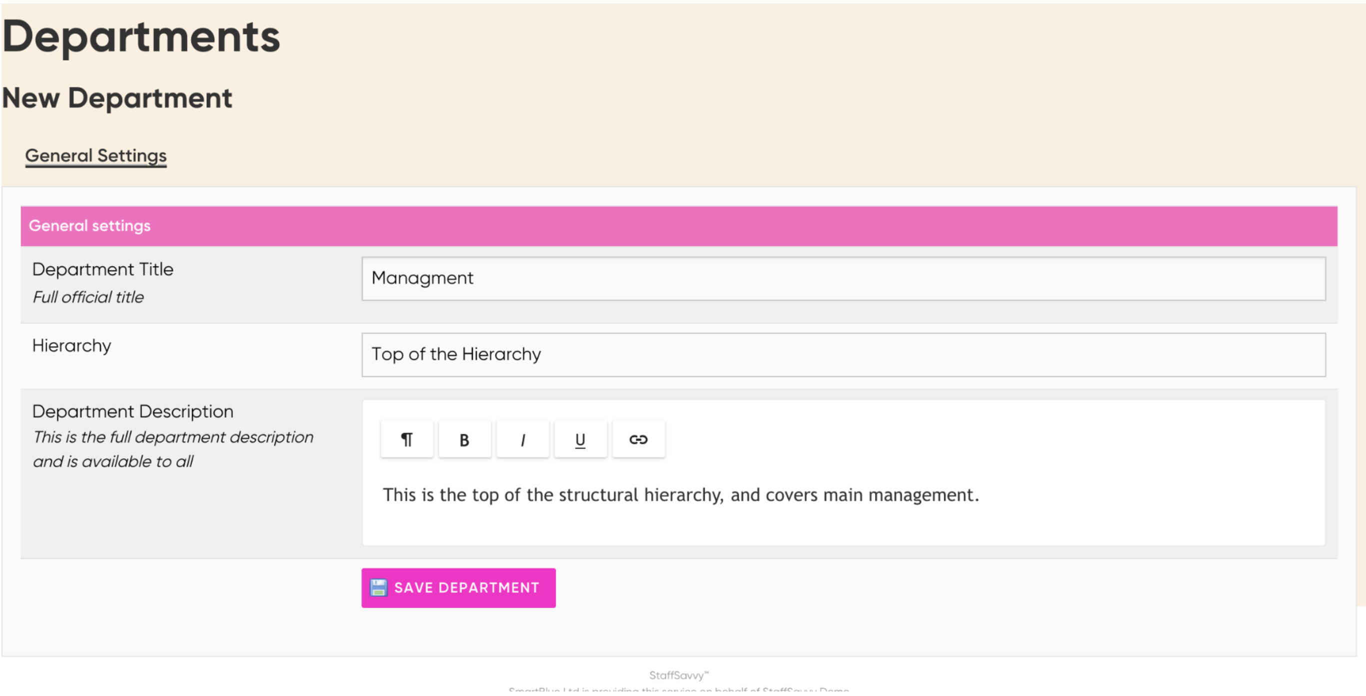
Whilst both features serve a purpose of separating different parts of your organisation, departments is a more complex and integrated version of this. Whilst Venue Groups allows you to filter to view only a specific venue, there were still many elements of the site that could be viewed by any staff member with the same access level. Departments can provide true separation of management and security for files, assets and personnel details.

4.1.5. Creating Departments

Creating new departments is simple. However, assigning existing venues, skills, and assets to a specific department will take some effort. The good news is that any items not yet assigned to a department will retain their original access level, so their current functionality will not be affected.

To get started introducing Departments to your system you will want to Go to System > Departments & Venues > Manage Departments. Then, go to the actions bar and click Create Department. If this is not coming up, ensure you have enabled permissions for a system manager to create and edit departments from the permissions level.

When creating a department, you will need to give it a title, a place within the hierarchy and a description. If your department is at the top of the hierarchy you can select this option, otherwise select another department to report to. Once you have created a department, an option will come up to manually add staff to a department individually, which can be helpful if there are specific staff who need to be added.



You should create as many departments as you have within your company, and to make things easier consider using the same structural process you followed when setting up your Venue Groups.

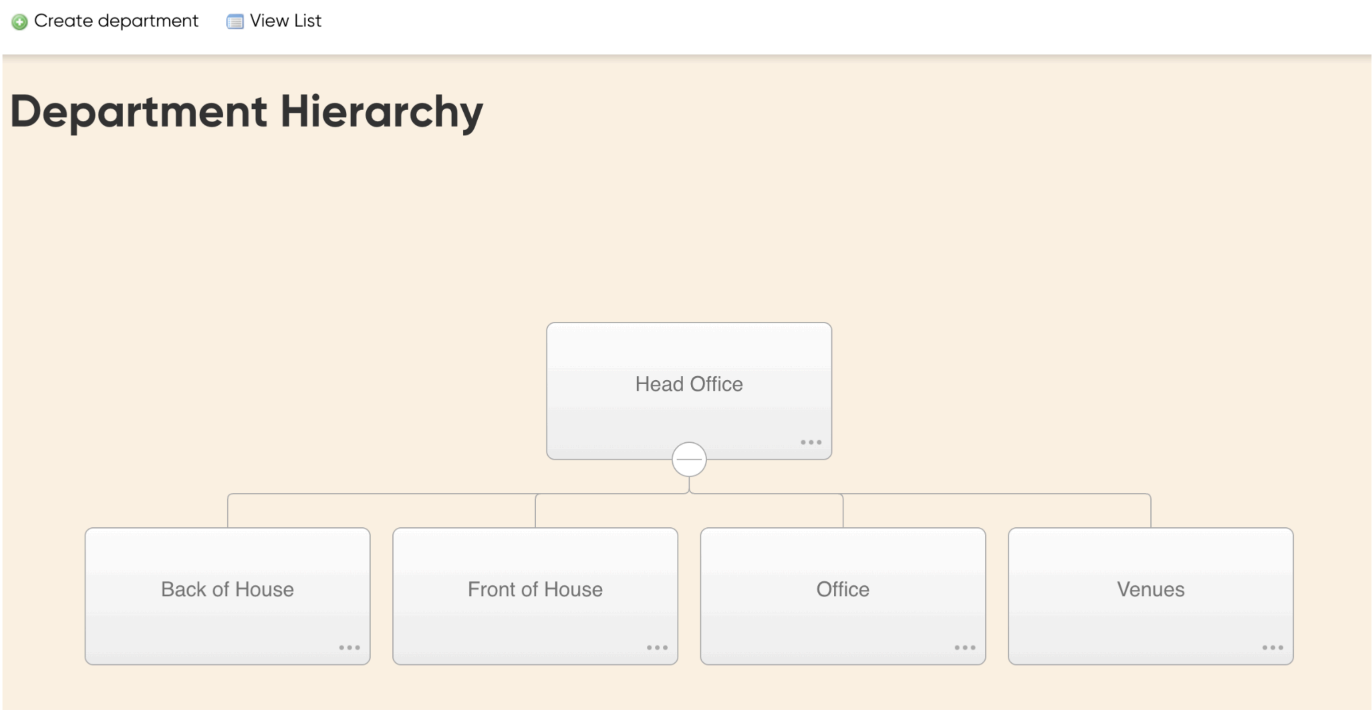
4.1.6. Creating a Hierarchy

Once you have created all the relevant departments within your company you can think about creating an organisational structure. Remember that once something has been assigned to a department, only staff within that department will have access to it, unless they are in a department that is hierarchically above them. So it is important to consider this when creating your department structure. To view your organisational structure, click to view Visual Manager from the actions bar, which you can see under Manage Departments.

What would this look like in practice?
Now we have discussed why it is useful to have departments. Let's consider what this would look like in practice. At the top of your company you might have a management department, which encompasses your management personnel who have access to a lot of important information and make company-wide decisions. This might

include your CEO, Chief of Staff, Chief of Operations. The management department would be at the top of the hierarchy and have access to everything assigned to them at that access level.

From here you might have several different departments under this, which operate separately. If we consider an example at a theatre, departments could include Front of House, Back of House and the Office. These departments don't have a lot of interaction and so managers of these different departments might not need access to all information.



It is important to remember that assigning the permissions to view, manage, and edit departments grants access to a large amount of information. Therefore, we strongly recommend that this access typically be assigned to System Managers. Personnel with this permission will also benefit from a simpler organisational view when assigning assets, as they can now filter by department.

4.1.7. Assigning a department to an asset

One of the key benefits to introducing Departments to your system is assigning things to departments, as this is where departments come to life. It is important before implementing Departments to understand that you will need to go through and individually assign assets to a department or your access will be affected. In this section we will go through all the affected assets.

4.1.7.1. Venues

When creating or editing a Venue the first thing that comes up under Venue Details is what Department that Venue Falls under. Once selected this will have a knock on effect on access as a venue can only belong to one Department. Once assigned, you will only be able to assign Skills that have been assigned to this department as well. You also will only be able to assign approved documents and forms that are available under this Department. If we were going back to our theatre example, Venues that might come under a Front of House department might include areas such as Theatre Bar, Merchandise stall or Main Theatre.

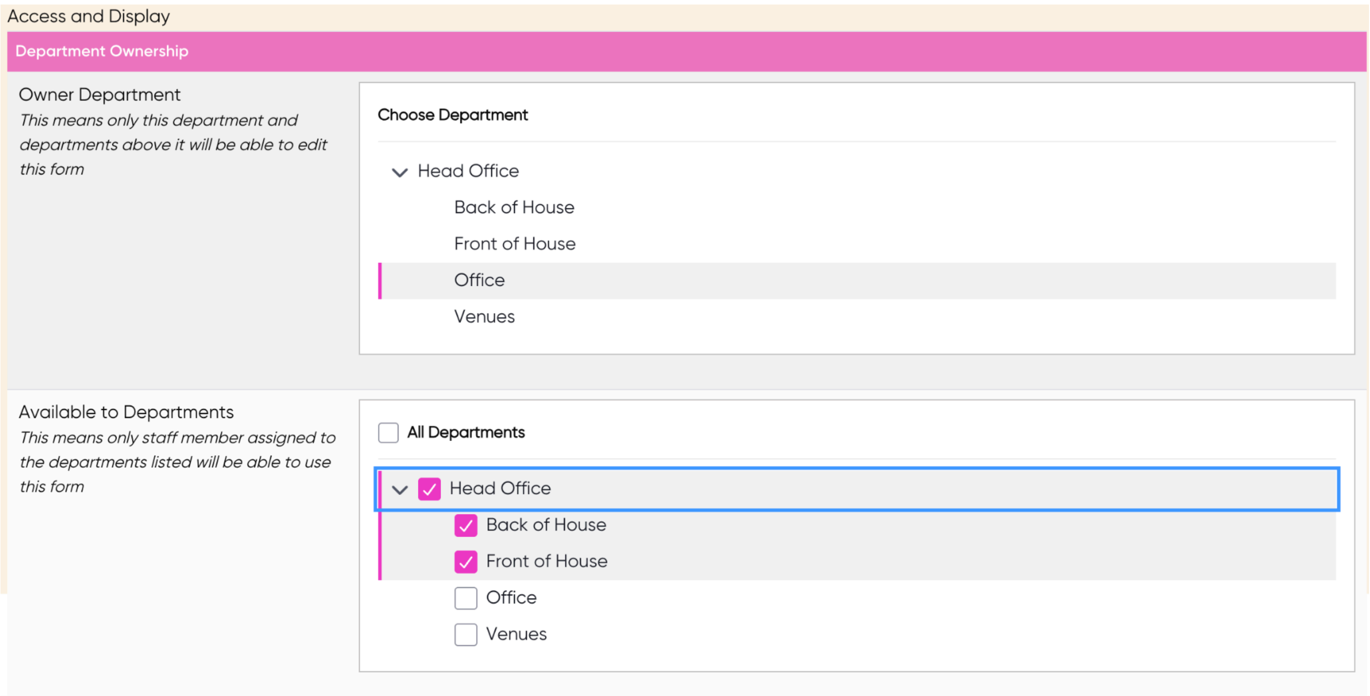
4.1.7.2. Skills

Once applied to Venues, it is important to assign your Skills to the correct Venues as together these are the cornerstone elements that will help you build up a department. To do this go to Staff > Staff Settings > Staff Skills. Then when editing or creating a Skill you will see the option to assign a Department. Some Skills should fit simply into certain Departments, such as for a Front of House department you might add, Bar Staff, Box office Staff, Ushers, Front of House Manager, Cloakroom Assistant and many other relevant roles.

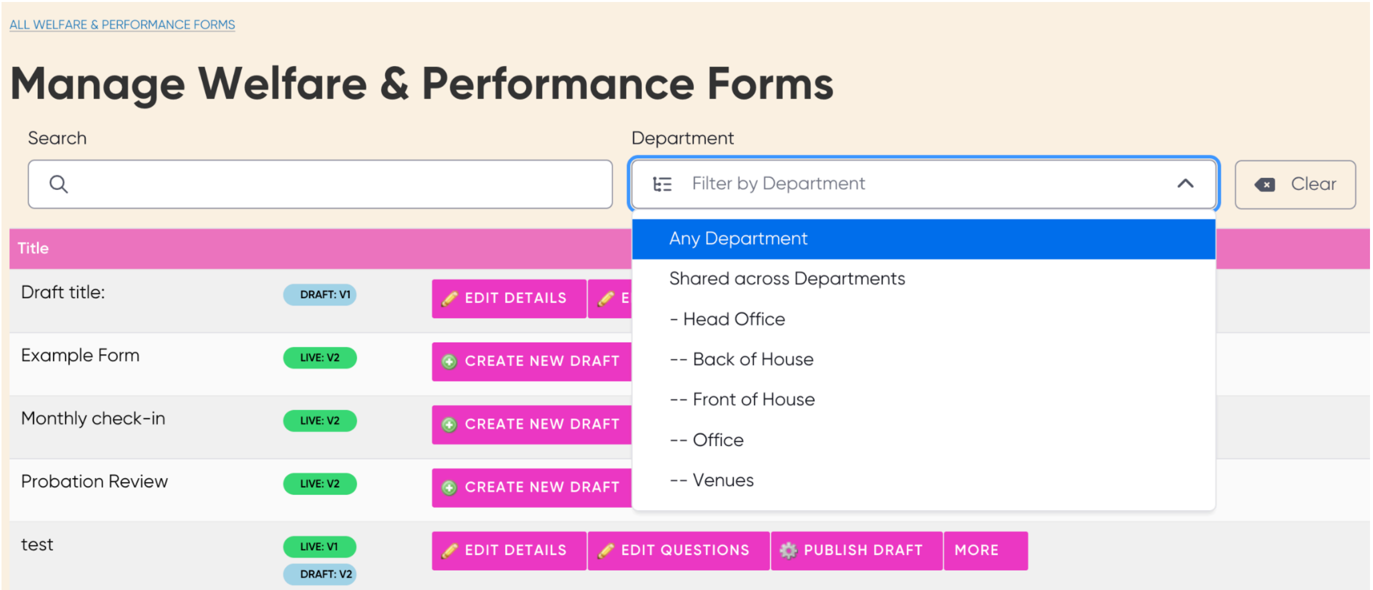
Once assigned this means only this department and departments below it will be able to access and use this Skill. To reiterate, once you assign a Skill to a Department, to assign that Skill to a shift you will need the Venue you are assigning shifts in to have been assigned to the same Department. You can see from this how closely, Venues, Skills and Departments work together in this new structure.

2.1.4.3. Other assets

Now we have gone through the main areas affected by departments we will go through other assets that can be assigned.
Forms can now be assigned to a department. Do this by going to Systems > Documents > Forms > Manage Welfare and Performance forms and Create a new form. Under access and display you will see there are two new options. The first element to select is who owns the form. This means only this department and departments above it will be able to edit this form. In addition to this you can set separately who this form is available to use. This means staff members assigned to the departments listed will be able to use this form, and be assigned this form but will not be able to edit or change the form itself.



Then, when you are viewing all forms, with the right access level, there is a search feature which allows you to filter by Department.



This also allows you to view when a form has been shared across all departments.

Performance and Welfare forms are an example of one asset that can be shared to a specific venue. Contracts are set up in a similar way, where there are two department configuration options.

- Contract Owner: The chosen Department and those above it in the hierarchy can edit this contract.
- Department Usage: The selected Departments (and those below them) can assign this contract to their staff, but they cannot edit the contract itself.

Other assets that can be assigned to a Department include: Messages, Tasks, Alerts, Triggers, Certificates, Exams, Document Types, Shift Tasks, News, check-in Forms, clock-in locations, personal records, recruitment positions, recruitment forms, training programs, steplists, tasks, case types, assets, awards & shift ranges.

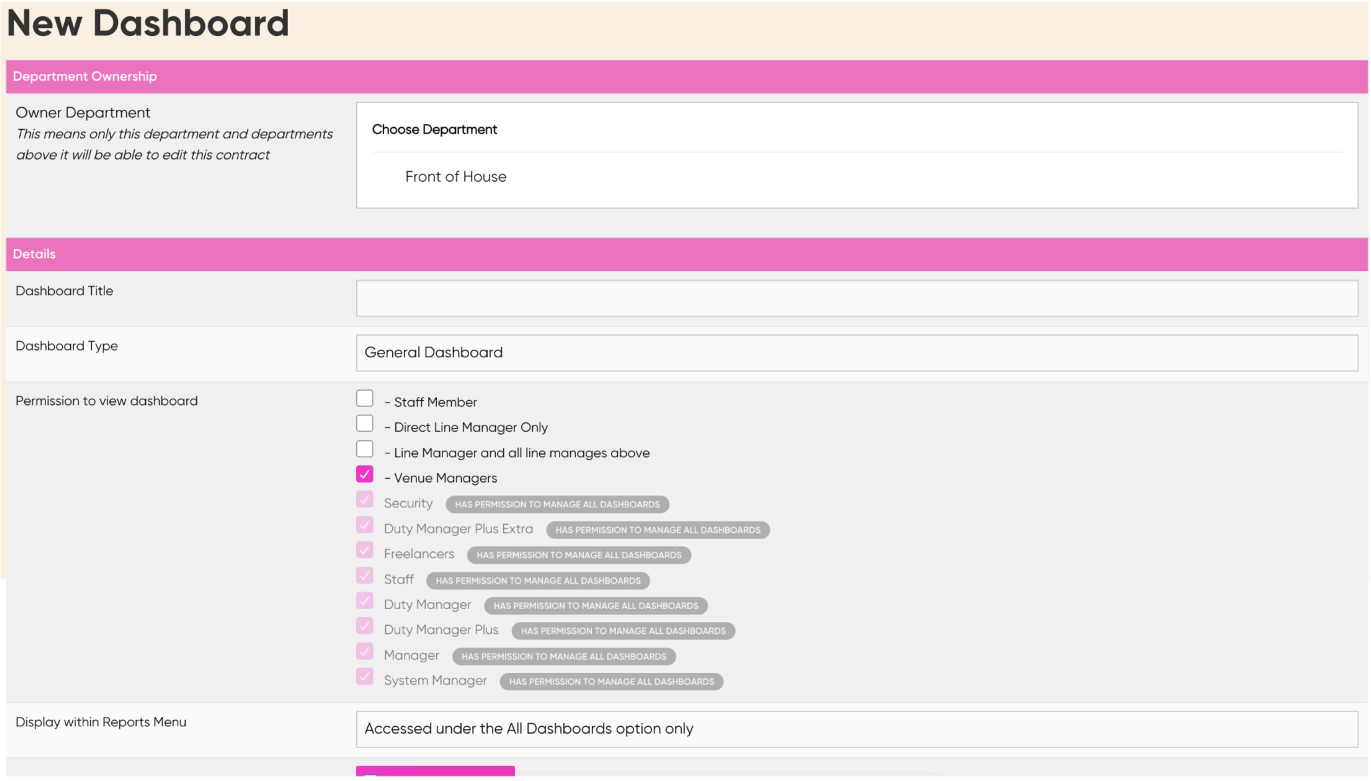
It is worth noting as well, that whilst assets like Templates of Deployments are not assigned to a Department, if you choose to assign them to a Venue, there will be a chain effect where you will only see templates depending on the the Department you are managing which will have been assigned a Department.

4.2. Dashboards

Another key new feature is Dashboards. The new Dashboards feature is a visual update that allows you to customise the content and layout of the Dashboard, which is the main landing page. This feature has been introduced to give more control and customisation to your company.

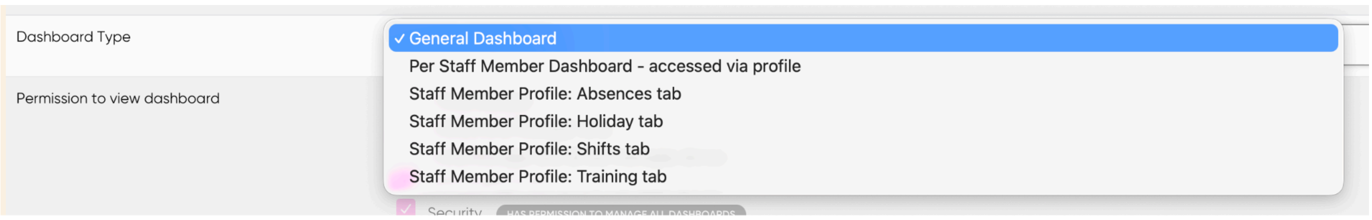
4.2.1. Setting up Dashboards

This new update introduces an entirely new page just for Dashboards. You can navigate to this via Reports > Manage Dashboards and create a new dashboard. When building a Dashboard, you will first need to set details, including what departments can view this Dashboard, the title and who has permission to view. Permission to view already includes everyone who has been given permission to view under access levels, but here you can choose to add any additional access levels that you want to be able to view this specific Dashboard.



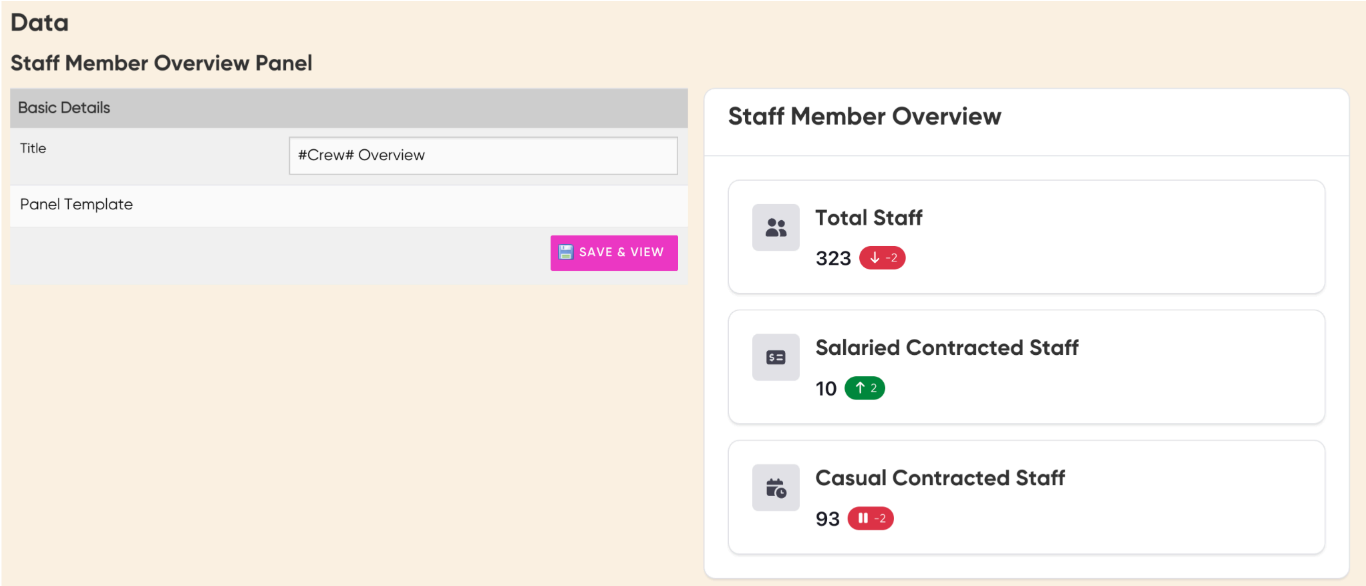
4.2.1.1. Dashboard Types

A key feature to consider here is the Dashboard type, as this will affect where you can view your Dashboards. You can choose to create a general Dashboard, a specific Dashboard that will only appear on a staff member's profile, or a Dashboard that can appear under the Holiday tab, Shifts tab, or the Training tab.
In general you will always be able to view your Dashboards under the Manage Dashboards page.



4.2.1.2. Dashboard Panels

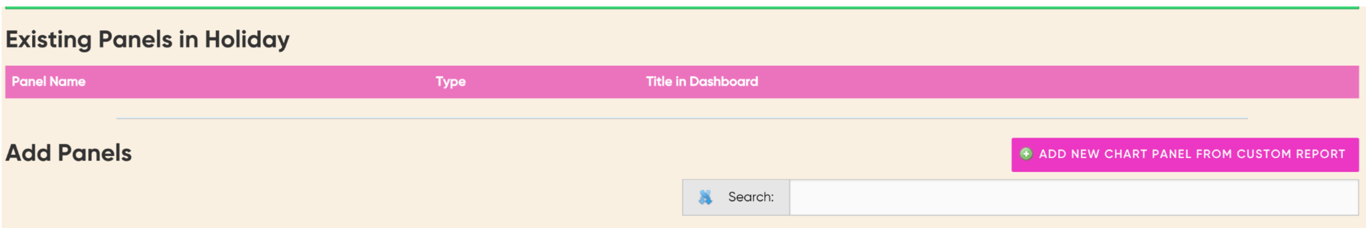
Once you have created details for your Dashboard, you can add panels to customise your Dashboards. These panels are what make up the building blocks of your Dashboard and are StaffSavvy's way of visualising your data. There is a list of existing panels that you can use whilst building your custom Dashboard. These are all editable and you can go in and adjust the title and details of each part of the Dashboard.



You are also able to adjust the layout and move around the order each panel will appear as you complete your Dashboard.

You are also able to build a new panel by pulling information through from a custom report.
For each panel you can set specific details. You can set a new title for your panel and set which report you will be pulling information from. From that report you can pull one column through. After the basic details, you can filter what data should be pulled through depending on the column.

Finally, you can choose how you want this information to be displayed. We have several display chart options, including Bar charts and Pie charts, the only thing you need to decide is what is the most effective way for your data to be displayed. You can also sort data alphabetically.



We have created a variety of panel options for you to get started building Dashboards and plan to expand this growing feature. We will be adding more options based on user feedback so make sure to contact support if you have any requests.4.2.2. Managing Dashboards

Once you have created your Dashboards you can view them under Reports > Manage Dashboards. When managing your dashboards you can search by name to find specific dashboards. You can also filter your search so that you can see one of three options. You can view only the system templates, only your own custom dashboards or view all Dashboards at once.

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

