StaffSavvy

User Guide:
New Features & Changes in v2026.2.0

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1. Introduction to this release

Welcome to v2026.2! We have a host of exciting new features along with a long list of improvements and useful new options.

We're really excited about the new Projects tool for managing groups of events; this is going to be really useful for a collection of different uses.

Our deployments tool has had a massive upgrade with the ability to split template patterns between different staff, plus the ability to link training or skill requirements to positions to really bring automation to your deployment planning.

We've also introduced short-notice payments for cancellations or rescheduling of shifts. Whilst this feature will be helpful across all our clients, it is extremely pertinent for UK clients as payment for shifts cancelled with little notice is soon to be a legal requirement in the UK.
This option allows you to define the rules per contract type, and the system will automatically add the compensation time entries for you to review and approve as normal.

Along with these, we've brought over 55 improvements and new options.

1.1. What's next

In 2027, we'll be introducing a refreshed design and navigation. This is the result of a year of work reviewing and consolidating how we can improve StaffSavvy with all of the recent additions.

The new menu will be streamlined to reduce the number of options, with many of the seldom-used pages moved to admin or configuration pages.

The release in 2027 will improve the structure of all the global configuration pages to make them clearer and all under one section.

We're also improving access to support for both managers and end users, with more details to come on how this will help you going forward.

The redesign will also focus on improving the layout for mobile and small-screen users, which will flow through to improvements to our app.

We'll be bringing you an earlier notice of the next release to allow you and your team time to prepare and experience the new design. Sign up to receive email notifications on all the upcoming releases.

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2. Changes to Current Version & Recommended Actions

2.1. Language Change from Steplist to Workflows

Going forward, within StaffSavvy, Steplists will now be referred to as Workflows. This language change has been made to better illustrate what Workflows do within the system.
Recommended Actions: No action required.

2.2. Language Change from Triggers to Automations

Going forward, within StaffSavvy, Triggers will now be referred to as Automations. This language change has been made to better reflect that Automations are used to trigger automatic processes.
Recommended Actions: No action required.

2.3. Exchange With… vs Offer Exchange

With the new Offer for Exchange process added in this update, we'd suggest making all staff aware that it is the new and better way to exchange shifts. We are looking for feedback on this process, so please share it with our support team.
Recommended Actions: Inform staff of the improved way to exchange shifts.

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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. Projects

- **Manage Projects**
  With the latest update, we have introduced Projects into StaffSavvy. Projects allow you to group events together for easier management. Projects can be assigned cost codes, just like events, along with start and finish dates. You can easily filter by project to see all associated events.
  You can also manage your shifts by project, viewing all dates attached to a project on the Grid or Weekly Schedule views.
  For more information about this new feature, see our In Detail section.
  To use: There are three things you need to do to set up Projects. First you need to turn on the feature. Go to System > Configuration > Global Settings > Toggle to the Features tab > Scroll down to 'Event Projects' and enable it > Scroll down and click 'Save Settings'. Secondly, ensure you have enabled the Projects Permission. To do so go to System > Levels & Permissions > Manage Permissions and enable the Manage Projects permission. Finally, go to Shifts > Manage Projects. You can create a new Project in the actions menu.

3.1.2. Deployments

- **Position Requirements**
  Just as you can add Skill requirements, you can now also add Position requirements. This means that when creating a new position in Deployments you can set up certain requirements a staff member must already have before they can be assigned to a deployment. Requirement options include: having a specific Skill assigned and active, having completed a valid training program or certificate. Each staff member will be checked against the requirements before being assigned a position. For more information, see our In Detail section.
  To use: Go to Shifts > Shift Settings > Deployment Positions. Create New Positions. There is now a new tab called Requirements. From here, you can add Skill, Program and/or Certificate requirements.

- **Improved Timeline View**
  We have redesigned the timeline view to make it easier to use, more distinct and robust. We have also made changes so that it is clearer on mobile device screens. See our In Detail section for more information.
  To use: Updated for everyone. Go to Shifts > Manage Deployments > Shift Deployments > Select Manage on the date you want to see.

- **Splitting Deployment Patterns Between Staff**
  This update allows Deployment Patterns to be split across multiple staff members. This means you no longer need to define each step of a pattern but can instead build the required staffing coverage in your

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patterns and allow the system to allocate each fixed deployment to the best available staff member. For more information about this new feature, see our In Detail section.
To use: Go to Shifts > Manage Deployments > Deployment Planner. Select Manage Templates and Create a New Template (or select Manage Template on an existing template). Set your details for the template, save, and you will be taken to Add Patterns to Planner Template. You will see a new option called 'Split between multiple staff?'. Select one of our split options.

- **Fair deployment allocation based on contracted hours**
  This update offers the ability to give fair deployment allocation based on contracted hours. For more information, see our In Detail section.
  To use: Go to Shifts > Manage Deployments > Deployment Planner. Select Manage Templates and Create a New Template (or select Manage Template on an existing template). Set your details for the template, save, and you will be taken to Add Patterns to Planner Template. You will see a new option called 'Allocation Preference' and a new option called 'Equal and weighted per contract FTE'.

3.1.3. Short notice cancellation or shift shortening compensation

- **Short notice shift cancellation payment**
  If a shift is cancelled with short notice, there is now an option to provide compensation to staff for the cancelled shift. All you need to set up is what will be considered the Short Notice period within your company. When enabled under a contract type, this will automatically create a time entry that equals the cancelled shift at the point of cancellation that will appear for approval in the unprocessed pay and weekly time sheets.
  This allows you to easily meet union rules and, if in the UK, incoming legal requirements over shift change notice periods. For more information, see our In Detail section.
  To use: Go to Pay > Contracts > Manage Contracts. Manage Contract Types in the action menu and set up your cancellation notice period.

- **Short notice shift reduction/rescheduling payment**
  If a shift is reduced so that it goes from being a longer shift to a shorter shift with little notice, there is now an option to provide compensation to staff for the hours they are now missing. All you need to set up is what will be considered the Short Notice period within your company. When enabled, this will automatically create a time entry that equals the reduction in expected paid time based on the shift at the point of change. This will then appear for approval in the unprocessed pay and weekly time sheets. The system will take into account other shifts or longer actual working, i.e. if you reduce the shift time to 2 hours but they end up working 3.
  This allows you to easily meet union rules and, incoming UK legal requirements over cancellation notice periods. For more information, see our In Detail section.
  To use: Go to Pay > Contracts > Manage Contracts. Manage Contract Types in the action menu and set up your Shift Change notice period.

3.1.4. Ratios across venue groups

- **Share ratio with primary venue group**
  This new option allows you to share a ratio across a whole venue group, with all venues in the group seeing the ratio and their scheduled staff being taken into account on the ratio itself. For more information, see our In Detail section.

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To use: Go to System > Venues & Departments > Manage Venues. Under the More button for the lead venue, choose Manage Ratios. Edit the ratio and set it to be shared in the primary venue group. Make sure you set the primary venue group for each venue so that these ratios are shared.

3.1.5. National Holiday Management

- **Ignore a single pre-defined holiday date**
  You can now ignore certain national holidays so that they do not count towards your national holidays. The system automatically includes all national holidays; this option allows you to ignore them. For more information, see our in detail section.
  To use: Go to On the System > Absences & Breaks > Organisational Holidays. There is now an option to click an option to ignore a holiday.

- **Add your own national holiday dates**
  You are now able to set the national holidays you want to use in Global Settings. You can remove all national holidays and then add new holidays under the Organisational Holidays page. For more information, see our in detail section.
  To use: Go to System > Configuration > Global Settings. Go to the General Configuration tab and under the Organisation tab select the Pre-filled National Holiday Dates option. There is the option here to manually add the dates you want to include. You can then set your new holiday dates via System > Absences & Breaks > Organisational Holidays, scrolling to the bottom of the page and adding a date.

- **Pre-defined holiday dates**
  You can set the national holidays you want to use in Global Settings. You have the option to choose from several countries/regions including: Australia, Western Australia, New Zealand, Canada, United States, England, Scotland, Wales, Ireland or Northern Ireland. For more information, see our in detail section.
  To use: Go to System > Configuration > Global Settings. Go to the General Configuration tab and under the Organisation tab select the Pre-filled National Holiday Dates option.

3.1.6. Improved Exchange process

- **Offer for Exchange**
  We have improved the exchange shift process, so that now staff can post out their shift for cover they can receive offers to swap rather than requesting one exchange at a time. Our existing shift exchange process required staff to pick a shift from a colleague they would like to exchange with. This meant they would need to choose a single person and a specific shift ahead of time. It was a slow and limited process. This new exchange process makes it more open and easier for everyone. Staff who want to exchange a shift can now put their shift up for offer. Other staff can see this from the available shifts page and choose which of their shifts to offer as an exchange.
  The staff member who started the exchange can then see all offers from all other staff and pick the offer that they'd prefer. All of the rules are maintained throughout the process as you would expect. You can expect that the old process of exchanging shifts will be retired by the end of 2027.
  To use: Go to Shifts > My Shifts. Under a shift that can be exchanged, click the Options button and choose the Offer for Exchange option.

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3.1.7. Feedback Forms

- **Improvements to feedback forms; now with version control**
  Previously, Feedback forms were created with limited management features and no version control. This new update brings version-controlled forms as well as the option to copy, preview, remove and set a category for each form. For more information, see our In Detail section.
  To use: Go to Training > Feedback Forms > Manage Feedback Forms. Ceate and publish a new feedback form. Then, to make changes you will need to create a new draft and republish. From the Manage Feedback Forms page, click the MORE button next to a specific form to see all additional options.

3.2. Additional Improvements

3.2.1. Holiday

- **Home Venue shown on Holiday Request page**
  With the latest update, you are able to see the Home Venue of a staff member making a holiday request. This option will appear for managers in charge of Holiday and approving requests. This is a new filter option that, in addition to the sort-by option, provides context and more detail for managers managing Holiday.
  To use: Managers can go to their Dashboard and, under Notifications, should see a notification that looks like 'Holiday request to review'. Click the notification, then on the holiday requests page, in the actions menu, select Settings, and you will see the Home Venue option. From here, you can choose to either hide or show the staff member's home venue.

- **Click through to book a holiday from the My Holiday Availability page**
  Under the My Availability tab, there is a new page we have added called My Holiday Availability. This page is a calendar view that allows you to see which days are available for you to request off (with ratio warnings). From this page, you can click any date, and you will be taken directly to book a holiday.
  To use: Go to Availability > My Availability > My Holiday Availability. Hover over a date and click to book a request.

- **Display holiday warnings to managers when approving a holiday**
  Now, when a manager goes to review a holiday request, when they click approve, the pop-up box will display a warning (the same as on the holiday availability calendar) if the request will leave the staff member with a negative balance or the request is during a date set that you have blocked holidays for. This will only apply if you have set up warnings for certain types of holiday requests in a contract.
  To use: Managers can go to their Dashboard and, under Notifications, should see a notification that looks like 'Holiday request to review' and click the notification. Then, on the holiday requests page, when they click Approve Request in the pop-up box, an orange warning message will appear if the request will cause any issues.

- **Bank Holidays displayed on Absence Calendar**
  We have now added national and organisational holidays to the absence calendar so that you can factor them in when viewing holidays. Bank holidays will now appear in a blue box next to the date.
  To use: This has been added automatically. To view, go to Reports > Staff Reports > Absence Calendar.

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- **Block new holiday requests within the current holiday year once holiday rollover has been approved**
  There is a new optional feature that blocks holiday requests once the manager has confirmed holiday rollover from a holiday year into the next. Any further requests will be blocked as they would affect the rollover. If this feature has been enabled and a staff member requests a holiday, they will be unable to do so.
  To use: Go to System > Configuration > Global Settings > General Configuration. Under the Organisation tab, enable the 'Prevent new holiday requests after rollover confirmation' option.

- **Deduct a full holiday day even on shorter shifts**
  There is now a new option in the Existing Shifts drop-down, in holiday settings, that can determine how many days leave need to be deducted from a staff member's holiday allowance (either using the working pattern or using shifts scheduled). Previously, the 'Use scheduled shifts' option would book a day or half day based on the shift length. This new option is set up so that the system will always deduct a full day if there are any affected shifts (e.g. not half days). This is a helpful option if certain types of shifts are short enough that the system would register them as a half-day, but you want them to be considered as a full day.
  To use: Go to Manage Pay > Contracts > Manage Contracts and create or edit a contract. Under the Holiday Tab, go down to the Existing Shifts option. There is a new option for what to do with existing shifts. You can now deduct a full day if there are any affected shifts.

3.2.2. Recruitment

- **Add Departments to Positions**
  With this most recent update, you can now assign Positions to specific Departments. If you have introduced Departments and have separated areas in your company, it can be helpful to also split up the recruitment process. For example, if you have a front-of-house department and an IT department and are hiring for a bar manager, you might want only your front-of-house team to manage the position.
  To use Recruitment > Manage Positions. Click Create New Position from the actions menu and then select the Departments you want to have access to this position.

- **Date as an answer**
  When adding questions to an application form, you can now create a question relating to a date. There are three question types that relate to dates. The first option lets respondents enter any date; for example, the question might be "When did you leave your last company?" and they would be required to enter a date. Alternatively, questions can be configured to restrict responses to past or future dates only.
  To use: Go to Recruitment > Forms > Application Forms. From the actions menu, create a new Application Form and set up your details so that you can start adding questions. Write a question and then under Answer Format, choose one of the three date-related options.

- **Shortlisters can now transfer candidates between positions**
  Previously, you needed to be a recruitment admin to transfer applications between positions. With this new update, shortlisters with decision access are able to move applicants to other positions they are also decision makers in.
  To use: Go to Recruitment > Manage Positions. View all applications for the position you are interested in and select View Application for the applicant you want to change. In the actions menu, there is now the option to transfer to another position.

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3.2.3. Reports

- **Pay Item Reporting: New custom report type: Pay Items**
  This update brings a new custom report option that allows you to build a report centred on Pay Items. This custom report has 17 dedicated columns (not including personnel information). These columns can include the staff member, the name of the Pay Item, the date it was earned, the amount earned, and the Skill it was earned against. Other relevant columns include the Venue and the Account and Event Code. You can also view whether the Pay Item has been deleted. This report allows you to gather information on the Pay Items used in the system. In general, Pay Items are used for unusual or one-off shifts, which makes this feature useful for tracking the details for these shifts.
  To use: Go to Reports > Manage Custom Reports. From the actions menu, click Create New Report. Then under Report Type, select Pay item.

- **Downloading Personal Records as PDFs**
  There is now a new option to download (PDF) Personal Record entries. This can be helpful if you want to be able to print out a copy of a record as part of internal proceedings; for example, you might have 3 recorded entries of a staff member underperforming in their duties, and you may wish to download and print this record to bring to a disciplinary meeting as evidence.
  To use: Go to Reports > Welfare & Performance > Personal Record Report. Click into the report and select Download report from the actions bar. You can also view and download the report from your Document Store.

- **Include partially submitted phases on Welfare and Performance Forms**
  This new option allows phases within a recruitment form to remain “editable” by the person assigned to them until a fixed phase in the form or final submission. Previously, you couldn’t edit a phase that was completed without sending it backwards for full editing.
  Now there are three options for setting up phases. You can choose to set it up so that it works the same as before, where you cannot edit the form unless it is sent back for full editing. Alternatively, you can choose one of our new options: edit by phase, where editing is allowed until a certain phase (you can select which one) has been completed, or allow for edits up until the entire form has been submitted.
  To use: Go to System > Documents & Forms > Manage Welfare and Performance. Create a new Welfare and Performance form. Create the details for your form and save. Then in the Actions menu, select Edit Form Questions. Then in the Actions menu, select Manage Phases. You will need to give each phase a title and set who it should be completed by. Under Completed by, there is now the option to ‘Allow editing of this phase after submission '. You need to have several phases created for this option to come up.

3.2.4. Shifts

- **Time and date visible on Offered Shifts**
  This update makes it easier to see when a staff member has offered to take a shift. Normally, when choosing between staff who have offered to take a shift, you can only see the names of staff who have offered to take a shift. With this update, you will also see the date and time they offered to take the shift directly next to their name. This helps make the process fairer if you want offered shifts to be run on a first-come, first-served basis.
  To use: Go to Shifts > Manage Shifts. Select the date you are interested in and go into Grid View. You will need to have offered shifts in your schedule and will also have to wait till people have offered to work.

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Then, once someone has offered to work, there will be a green button next to each offered shift indicating the number of people who have offered to take this shift. Click the transfer icon, and it will come up with each staff member and the date and time of the offer.

- **Sort by firstname/surname on Manage Shift Week**
  In this update, there is a new option called Sort By in all viewing modes (other than All Shifts) when managing your shift week. This option allows you to choose whether you want to sort by first name or last name. This will then change the order of staff shown on this screen.
  To use: Go to Shifts > Manage Shift Schedule. Then, in the Actions Menu under Settings, there is a new Sort By option. You can choose to sort by either first or last names.

- **Shift Duration visibility to show on shifts**
  With this update, the Shift Details page now offers much more information about shift times, taking into account contract settings. Shift Details now includes Shift Duration (known as Working Duration), which excludes any expected breaks. You can also see the Paid Duration, which includes expected paid breaks and manipulation rules. The Contract Duration has also been added, which is the number of hours expected to count towards the staff member's contracted hours. The final addition is the expected cost of the shift.
  To use: No action required. To view Shift Details for your own shifts, go to Shifts > My Shifts > and then select Details. You can also access other staff members' shift details under Manage Shift Schedule when you right-click and select Shift History.

- **Cover Requests page can be filtered by offer**
  The Cover Requests page now has the option to filter by offers. There is a new option to show only shifts with offers to work and another option to only show shifts with no offers to work. This feature is helpful for teams that schedule shifts further into the future, as it means that personnel don't have to scroll through shifts that already have offers and can focus on the shifts that still have no offers to work.
  To use: Go to Reports > Shift Reports > Cover Requests. In the top left corner, you will see options to show all Shifts, only show Shifts with Offers, only show Unassigned Shifts or only show shifts with active cover requests.

- **Add a 'Venue Group' filter to the Shifts Worked Report**
  There is now the option to filter shifts so that only shifts within the same venue group are shown. The current option lets you filter by Venue, but this new update allows you to filter by Venue Group so that you can see all shifts within a Venue Group. This option can be helpful for managers taking care of multiple venues.
  To use: Go to Reports > Shift Reports > Shifts Worked Reports. Then, under the Shifts Worked option in the filter box, in the top right corner, you can now select a Venue Group to filter by.

- **New Sort by Options on the Cover Shifts page**
  Under the Cover Shifts page, there are new additional Sort By options. You can choose to display only shifts with offers to work, only show shifts still requiring cover or only show unassigned shifts. This feature is useful for teams that schedule shifts far into the future, as it means that they don't have to scroll through shifts that already have offers and can instead focus on shifts that still have no offers to work.

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To use: Go to Reports > Shift Reports > Cover Shift Report. In the top left corner and under the new Sort By button, select Only Cover Requests, so that you can see shifts that need cover.

- **Added Sort by Options when exchanging shifts**
  You can now sort by the staff you want to appear at the top of the list when deciding who to offer to exchange shifts with. You can sort by either first name, last name, or who requires the most hours.
  To use: Go to Shifts > My Shifts > Next to the shift you want to exchange, select the options button. From the options drop-down, select 'Exchange With…'. A pop-up box will then appear, and in the left-hand corner you will see a sort-by option. From here, select one of the three options. This option also appears if you click to view shift details from the My Shifts page and select the exchange shifts option from there. You can also find it when transferring shifts in Grid View.

- **Daily Schedule to show events and cost codes**
  In the Daily Schedule, there are two new columns that display both cost codes and events. In addition to this, the cost codes and any events scheduled will also appear within Shift Details for managers viewing the shift.
  To use: Go to Reports > Shift Reports > Daily Schedule. There you will see a new column if the cost centre is available to view.

- **Clocking Terminal break popup includes staff member's name**
  Now, when you click on a staff member's name to view break options under clock-in screens, the system will now refer to the staff member by name; for example, the screen would read "Amy, as this is an unexpected time entry, you can take an unlimited break if required".
  To use: Automatically applied; will appear when managing clock-in screens, when you click on a staff member to look at break options.

- **Unlink shifts**
  This is now the ability to unlink two or more shifts that have been created. Previously, if you needed to cancel the middle of a linked shift, you would need to cancel all shifts and reinstate them. With this update, you are now able to unlink one of the shifts from the others, so that the other shifts remain linked.
  To use: Go to Shifts > Manage Shift Schedule. Click on the specific shift times to edit the shift. The unlink option is at the bottom of the shift popup that appears when you click on the shift you want to edit. This option will only appear if the shift is linked.

- **Add Shifts Off functionality to My Notifications & My Shifts**
  Shifts Off is being transitioned out in the next release; to facilitate these changes, any shifts that need to be dropped will now appear under **My Shifts**.
  Under the My Shifts page, there is a new category at the top of the page that shows all shifts you are able to drop. This option will only appear if the shifts off (created on the Create Shifts Off page) match up with the shifts that have already been assigned to the staff member. Additionally, in the options menu, next to a shift, you can choose to drop a shift (this will only come up if there are shifts you can drop). There has also been a language change, so staff will be asked to "Drop Shift" rather than having a "Shift Off".
  To use: Go to Shifts > My Shifts. Select the Shifts I've been invited to drop option.

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- **New icon for Cover Shift Request button**
  We have created a new icon for the Cover Shift Request button, which can be found on Week View. The new icon is a sad face to indicate that a shift is missing cover.
  To use: Go to Shifts > Manage Shift Schedule. Any shift requiring cover will automatically come up with this icon next to the shift times.

3.2.5. Staff

- **View the Home Venue of Archived Staff**
  With the latest update, you are now able to see the home venue of any Archived Staff Member.
  To use: Go to Staff > Staff Settings > Archived Staff.

- **Duplicate a Role**
  This new feature allows you to copy a Skill in the same way that you can copy a Contract or a Venue. It allows you to quickly create a role based on an existing one without re-entering all the same details, making it ideal for roles with similar requirements and documentation. When you click copy, rather than automatically making a copy that you can go in and edit, you are immediately pulled into the Skill Settings page to make changes. If you are happy with the changes, you can save the new role. However, if you go back without saving the role, it will essentially undo the copy.
  To use: Go to Staff > Staff Settings > Staff Skills. Select the copy button, and it will duplicate the role. You will be taken directly into the settings for the new skill, where you can rename the new Skill and make adjustments to any of the other settings.

- **StaffSavvy ID added to Alert Report exports**
  If the option to Display StaffSavvy ID has been enabled in Global Settings, then this presents a column called StaffSavvy ID to the CSV export of Alert Reports. It will appear as set up in the Display StaffSavvy ID settings.
  To use: Go to Settings > Configuration > Global Settings. Go to the Staff & Contracts tab and scroll down to the Employee Numbers section. From here, ensure you have enabled the Display StaffSavvy ID option. Then, go to Staff > Alerts > Alerts Reports. Click to download the CSV report for the Alert Report you're interested in. It will be the first column.

- **Copying an Access Level now also copies permissions**
  Now when you copy an access level, it will also copy the access and permissions assigned to the original level to the new one. This includes access to: library, data sets, etc.
    - Access to data fields
    - Access to library items
    - Forum room access
    - Ability to view, add and verify permissions for document types

  To use: Go to System > Levels & Permissions > Access Levels. Click Copy, and a copy of the desired access level will appear below.

- **Bulk lock/unlock all staff data in a field**
  This update brings the ability to bulk lock and unlock staff data fields at once. This added option can be found when creating or editing a data set. This option allows you to quickly lock all data in the set so

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nothing can be changed, whereas previously, you were only able to lock data individually, from a staff member's profile. There is also a bulk unlock data option, which helps make it easy to undo past locking.
To use: Go to System > Staff Data & Processes > Data Sets & Fields > Edit Set Details. In the Actions Menu, select Lock all Existing Data.

- **Set ratios for specific days**
  This update expands the venue ratio options and allows you to be able to set ratios to apply only on certain days of the week. This lets you to be more specific with your ratio use and to set different ratios on different days. This can be helpful if you want to apply a ratio for weekends that is different to your ratios for weekdays.
  On top of this, you can apply this ratio to specific date ranges. You can create a ratio that is only active during one of your set up Contract Date Sets. This, again, is useful for making your ratios more specific to busy or quieter periods.
  To use: Go to System > Departments & Venues > Manage Venues. Use the More button to manage Ratios.

3.2.6. Time Entries

- **Changing skill on time entry will automatically change associated Pay Element**
  Now, when you edit a time entry and change the skill, the system will try to match it to the correct pay element. If this updated skill uses a different pay element, the system will ask if it should also update the pay element. A manager can then either accept this and update the pay element OR choose a different pay element.
  To use: Go to Pay > Weekly Timesheet. From here, you can click on the time entry you want to change. Then, when you've changed the Skill, and save you will see a pop-up asking if you would like to change the Pay Element.

- **Pay items on weekly timesheets**
  You can now add Pay Items directly to your weekly timesheets. It is now an addable option from the Actions Menu. To add to your timesheet, simply add the staff member you want to apply it to, their Skill and the date to apply to. You will also want to include the pay rate, number of units and cost centre.
  To use: Go to Pay > Weekly Timesheets. Select Add in the Actions Menu and click Add Pay Item from the drop-down menu.

- **Set Period Start Day on Weekly Timesheet**
  You can now set which day of the week your schedule will start on the Weekly Timesheet. This is helpful for companies whose business week starts on a day other than Monday and want to reflect that. This will also mirror the shift period settings automatically.
  To use: Go to Pay > Weekly Timesheet. In the actions menu under Settings, there is a new option, Lock Week Start Day', where you can choose which day of the week your weekly timesheet will start on.

- **Exclude time entries that are affected by specific rules from working time calculations**
  This option allows you to exclude specific time entries from working hours totals when certain rules apply. For example, if you had a rule that applies when a staff member works over 100 hours, you might need to have several other rules excluded, such as working on Sundays or overtime, as they would have different payment rules. These whole time entries would be excluded.

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To use: Go to Pay > Contracts > Manipulation rules. From here, scroll down to the Additional Filter Tab. There is a new option called Exclude Calculated Working Times if the time entry has been affected by any of these rules. From here, you can set excluded rules.

- **Calculate total working time using Paid Hours**
  There is a new option to use Paid Hours as the means of calculating total hours previously worked for a manipulation rule. This is a new calculation option.
  To use: Go to Pay > Contracts > Manipulation rules. From here, scroll down to the Additional Filter Tab. Then, under Calculate Working Times using, you will see a new option to calculate working times based on paid hours.

- **Filter by contract type on weekly timesheets**
  This update has introduced the option to apply contract filters on weekly timesheets. This mirrors the filters that can be used on the Unprocessed Pay page. When viewing the Weekly Timesheet, you will see a new option to sort by Contract Type. This option allows you to look at different contract types separately; for example, you could choose to only view staff with permanent contracts, or only review time entries for casual contracts. When filtering contracts, you can either choose to select each Contract Type that you want to include individually, or if there are regular contracts you like to filter by, you can set up Quick Select options.
  To use: Go to Pay > Weekly Timesheet. Along the top of the Schedule View, next to Viewing, Sort by Filter options, there is a new option to sort by Contract Type.

- **Time entries to show the worker's name on external supplier contracts**
  If you are working with supplier contracts, this new option allows you to view the worker's name on each time entry when you are looking at the Weekly Time Sheet or Unprocessed Pay. This is to help make it easier to recognise and manage time entries from suppliers.
  To use: Go to Pay > Weekly Timesheet and hover over the time entry. Additionally, go to Pay > Unprocessed Pay. When you click to expand a staff member's time entries, there is a new option ( *) next to the alarm clock icon for supplier accounts, which, if you hover over it, will reveal the supplier's name.*

- **Add Time Entry Permission**
  There is now a new permission called Add Manual Time Entries. This permission has been added to limit who can add manual time entries and pay items. By adding this permission, personnel will be able to view the weekly timesheet and add time entries and pay items from here.
  This can be used with, or without, the permission to Approve Time Entries, as whilst they have similar functions, they each have a separate purpose. It is worth noting that this permission, with no other permissions enabled, will only grant access to weekly timesheets for adding manual time entries.
  To use: Go to System > Levels & Permissions > Manage Permissions. Click Add manual time entries permission and add the access levels you want to be able to use this permission.

- **Ability to edit my own time entries**
  With this update, you can allow staff members to edit their own time entries. This is not a feature that is automatically enabled and must be enabled for each Skill that you want to use this feature. When editing a Skill, there is a new tab for Time Entries. This option allows staff to edit their own time entries before they are put into a wage sheet. If they edit an approved time entry, it will push the time entry back for

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approval from a manager.

Once enabled, staff members will be able to see all past time entries that have been approved, as well as the shift details for that shift. They can also edit their time entries as long as they are not in a wage sheet. You can change the times, the date, the venue, breaks, client and skill. It is worth noting that you can also only change the staff member's skill to another skill that allows editing. If they edit an approved time entry, it will be sent back for approval from a manager.

To use: To enable this feature, go to Staff > Staff Settings > Staff Skills. Edit or create a new Skill. Then, under the new Time Entries tab, select the 'Can edit time entries themselves' option. To access and edit time entries as a staff member, go to My Account > My Time Entries and Pay.

3.2.7. Communication

- **New Automation Event: Change to an expense (Previously Triggers)**
  A new trigger event has been added that will be set off by Expenses. When selected, the trigger will run when a change is made to an expense in Unprocessed Pay.
  To use: Go to System > Manage Automations > Create New Automation and add its details. Then, under Run this automation when…, select the 'When an expense is edited' option.

3.2.8. Documents

- **Rejecting uploaded documents with an explanation**
  When reviewing documents, if you choose to reject a document, you will now see a pop-up requiring you to confirm that you want to reject the document and to provide the reason you are rejecting the document. This will be saved to the document itself (for future use) but, most importantly, included in the rejection email to the staff member.
  To use: Go to your Dashboard as a manager and in your notifications, select the notification saying Documents needing Approval. This will take you to the Document Review page. Click Reject Document, and you will be shown a pop-up box where you can input your reason for rejecting the shift.

- **Overwrite/auto-archive document option**
  When uploading a document, there is now a tick-box option that allows you to archive previously uploaded documents. In My Documents or in the RTW console, when uploading a new document, the system will check to see if there are existing copies of that document and offer to archive them at the time of the new one being uploaded. This means you can have only one active document per document type for each staff member.

  This feature can be useful if you have an ongoing project or development log where you regularly upload the same information with updated versions. It improves clarity, saves space in your document store, and removes redundant information.
  To use: Go to My Account > About Me > My Documents. In the actions menu, select the upload or complete new document option.

3.2.9. Pay

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- **Increased decimal places for Pay Elements**
  When creating a Pay Element, you can now choose to set your Hourly Rate up to 5 decimal places. This is reflected on all locations where you see a currency value. The default is 2 decimal places.
  To use: Change the option in Global Settings to increase the default decimal places from 2 to your desired number. This option can be found under the Payroll tab in Global Settings. From here can choose how many decimal places are allowed for pay elements (between 2 and 5). Pay elements can now be provided with that number of decimal places, and all currency values will be shown to that number of decimal places throughout the system.

- **Reject expense requests reason**
  Now, when a manager goes to reject an expense, they can add a rejection reason. This is helpful as it provides clarity and helps staff to make the appropriate amendments before resubmitting.
  To use: All claims will be displayed via Pay > Unprocessed Pay. To view only time entries relating to expenses, under the filter option, ensure that 'View Time Entries and Pay Items' is unticked, and 'View Expenses' is ticked. Also, ensure that you have ticked the 'Hide Approved Time Entries' option. From here, you will only see all open expense requests. Then, click on a specific staff member and under Pay Rate/Value per item, look for Entertainment Expense. Click the pencil icon, and you will see the option to reject the expense. If you choose to reject, a pop up box will appear asking you to provide a reason.

3.2.10. Training

- **Unlimited number of attendees on courses**
  When creating a course, you can now have unlimited attendees. This means that online course admission can stay open until the course begins, with no capped numbers.
  To use: Go to Training > Training Plan > Create Course. Under the Number of Places, you can now select an unlimited number of places.

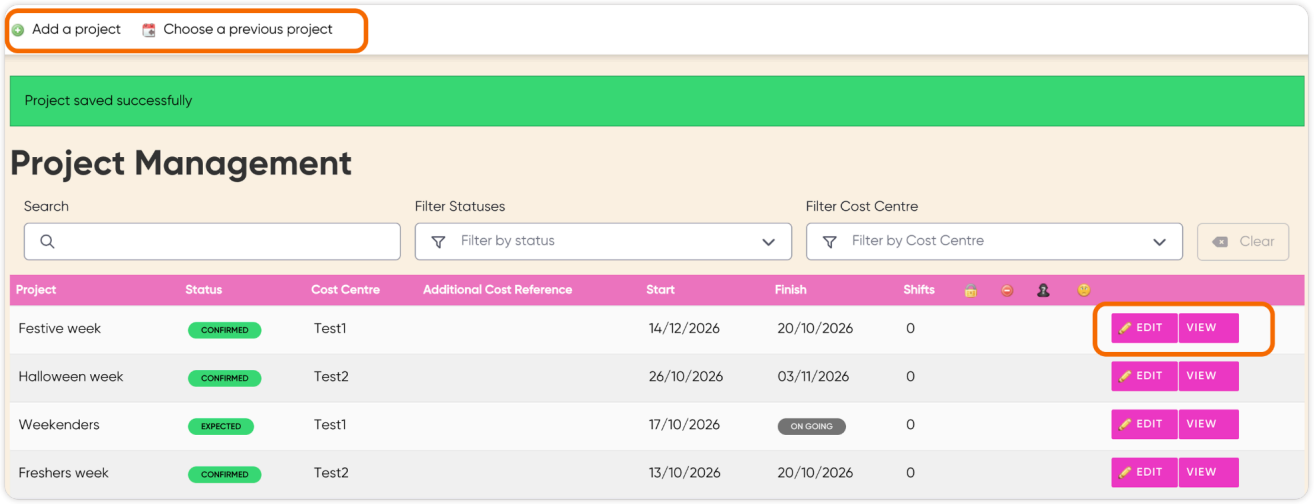
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4. In Detail...

4.1. Projects

Projects is a new feature that allows you to bring event details together across different venues and days to make it easier to manage large projects. By creating a project, you are able to manage multiple events all under one umbrella, making it easier to manage and view relevant events together.

To create a new project, click **Add a Project** from the actions menu. From here, you can add a project title - something that encapsulates all of the relevant events. You can also add a cost code and status for each project. Then, add a start date for the project and an optional finish date. You can choose to either leave the project as ongoing if it is a project with recurring events (such as regular weekend events), or you can set an end date if the project is for a set period of time, such as a single week-long series of events.



4.1.1. Project Status

You can set a status for each Project based on the likelihood of the event going ahead. Status options are currently for display/help information only and won't affect the project's visibility.
There are several different statuses. If a project is definitely going ahead, you can mark it as Confirmed; if it is expected to go ahead, it can be marked as Expected. Alternatively, if it is still being planned, you can mark it as a Draft. There are also status options for if the project has been cancelled entirely or has been completed.

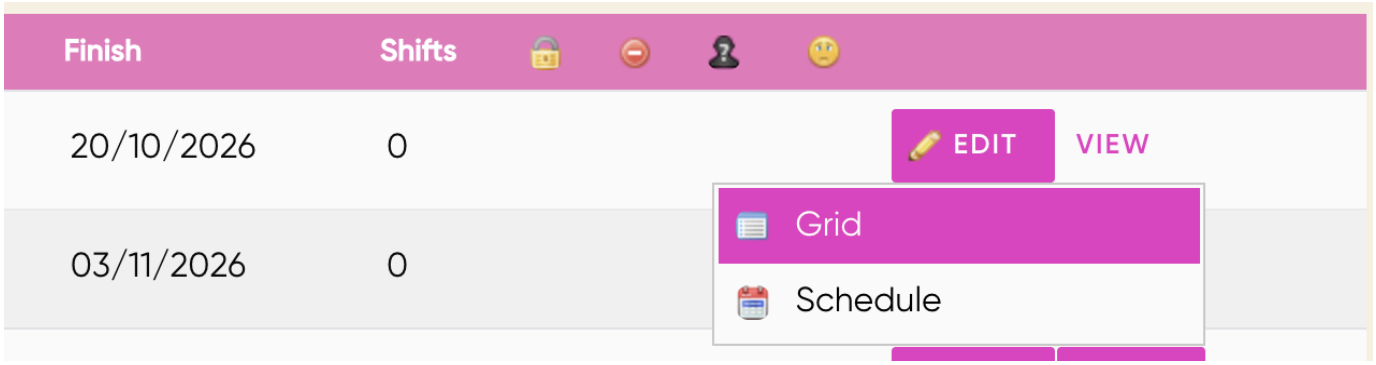
4.1.2. Filter options

When searching through Projects, you can filter by status type, which can be helpful if you want to work on Confirmed Projects. We also allow you to filter by cost code. This means that you can filter your projects by client. Each client should have a different cost code. You can also filter by cost codes 1- 4 if enabled.

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4.1.3. Scheduling events with Grid View

With Projects, you can view & manage the day's events and shifts in either **Grid** or **Schedule** view. This also lets you add multiple unassigned shifts simultaneously. To do so, once you have created a project, click the **VIEW** button next to the edit option. From here, you can select either Grid or Schedule view, depending on whether you want to view your projects in a calendar view (**Schedule View)** or in a **Grid view** with all the shifts.



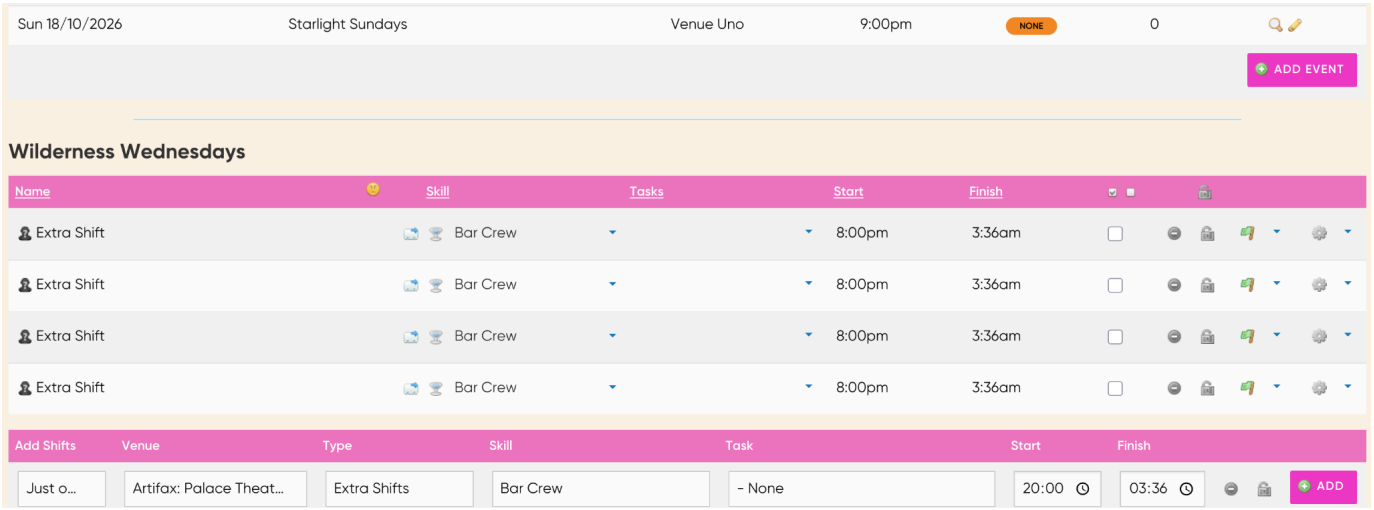
From either of these views, you will be able to create events, add shifts to them and oversee all of your events on one page.

If you select **Grid View**, you will see an empty project. From here, you can start adding events that will be a part of your project by clicking the **Add Event** button. You will need a title, date and start time, venue and a cost code. If you set an event at a venue that you are not currently working in, the event will not appear until you switch venues. If you have events within the same project at different venues, make sure they are in the same venue group, so that you will be able to view them altogether.



Then, you can start adding shifts. To do this, click the magnifying glass button next to the pencil icon.

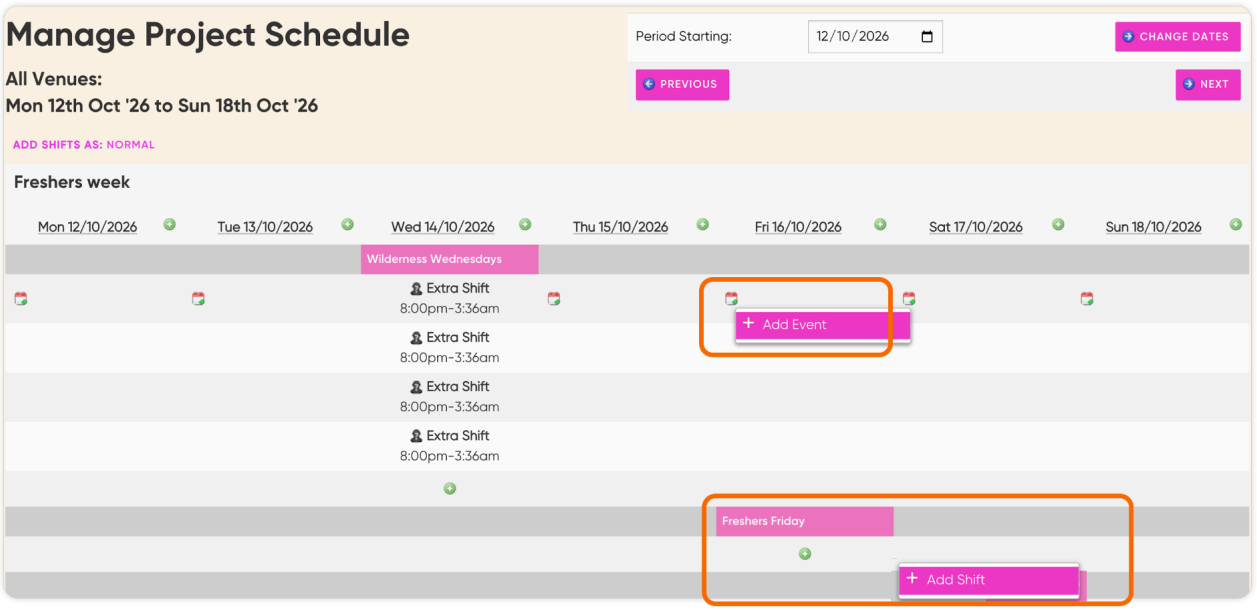
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You can then add shifts the same way you would in Grid View; simply choose the number of shifts, the shift type, the venue, the skills required and the shift times. Once the details are sorted, you can assign them.

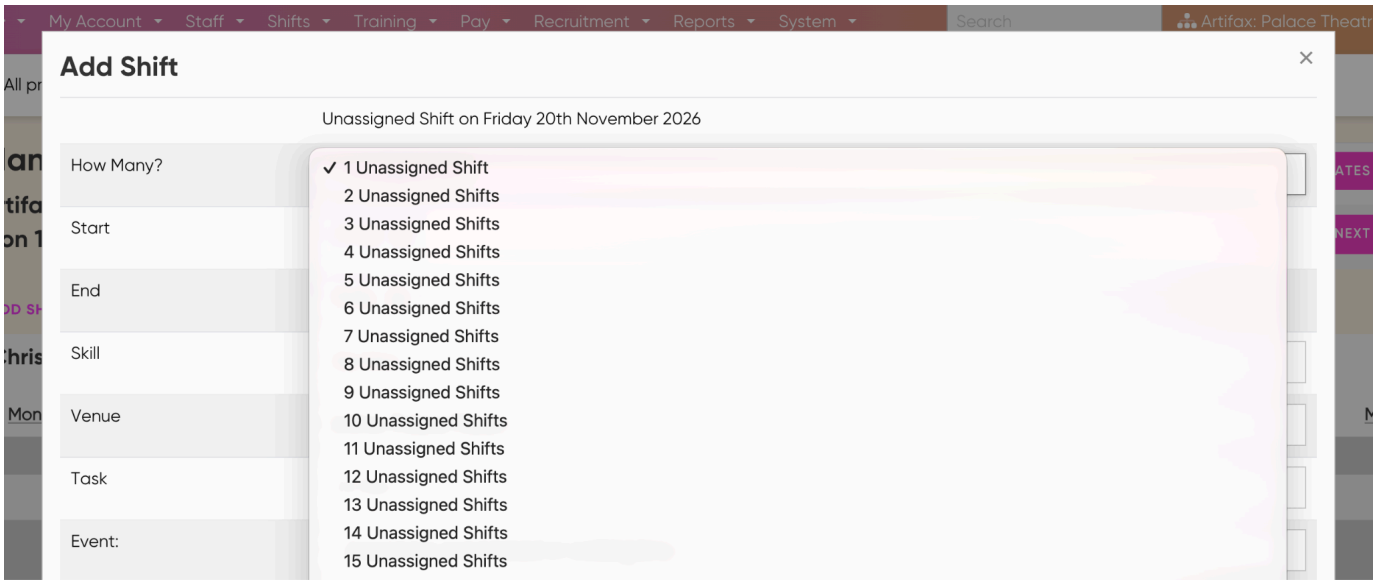
4.1.4. Scheduling events with Schedule View

You can also switch to view and create these events and shifts in Schedule View. This shows you a calendar view of upcoming dates. All events are split down the page, so you can see them clearly. From this page, you can add a new event via the green circle button next to each date, or by clicking the calendar icon in the corner of each date.



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Then, to add a new shift to an event, click the green circle button underneath the individual event. You will be able to select how many shifts you need



Once you have created these, you will be able to see these shifts here and also in your regular schedule.

4.2. Deployment Improvements

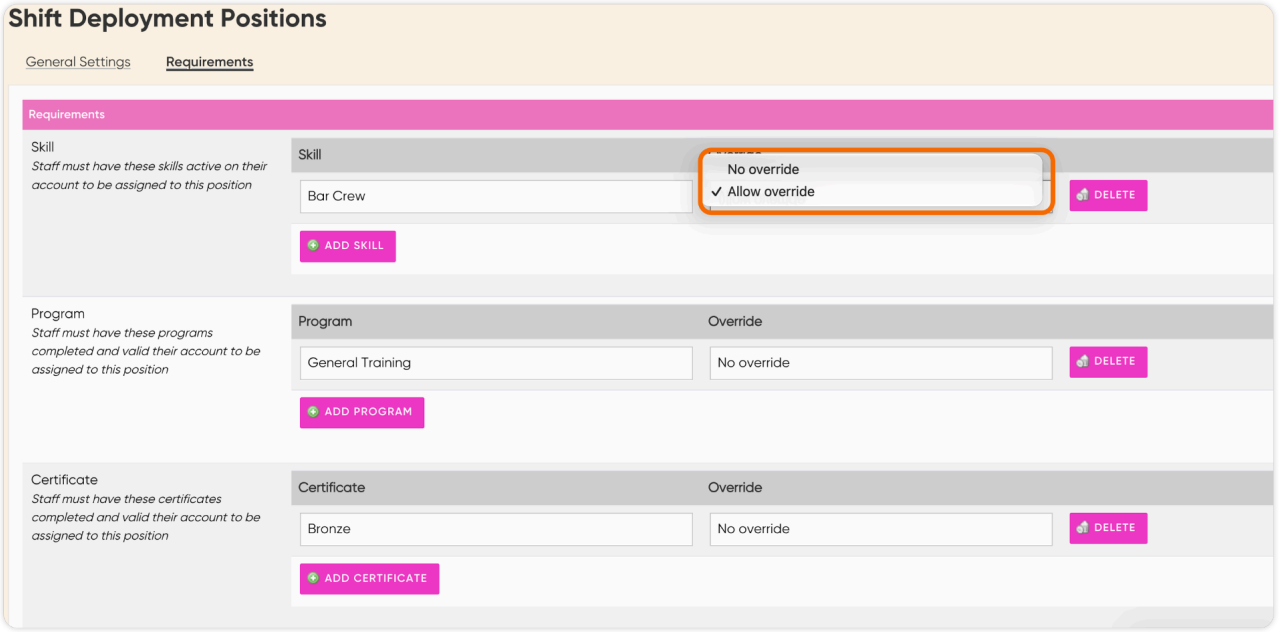
This update has brought key updates and improvements to the Deployments feature.

4.2.1. Position Requirements

Once you have added your Position details, you are also able to add requirements. From here, you can add Skill, Program and/or Certificate requirements.

If you create a Skill requirement for your position, it means that the staff member assigned to the deployment must have that Skill; otherwise, they won't be able to be assigned to that position. This can be helpful if you have certain training or certifications that come with certain areas; for example, the staff member would need to have the Health care provider role to be assigned to the first aid room.

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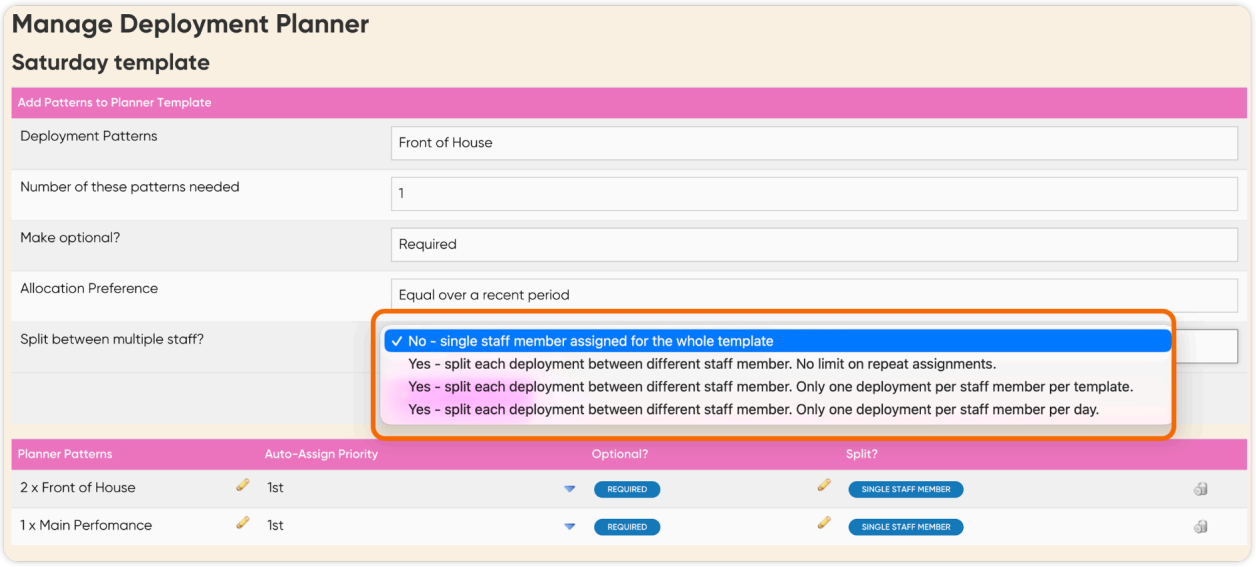
This applies in the same way for programs and certificates. If you want staff to have specific certifications to be able to work in this position, you can set that up here.
Additionally, there is the option to override. If you select allow override, and someone tries to assign a staff member without that requirement to the position, they would receive a warning message so they are aware that the staff member is missing the requirement, but they would be able to override on a case-by-case basis.

4.2.2. New Deployment template options

Splitting Deployment Patterns Between Staff

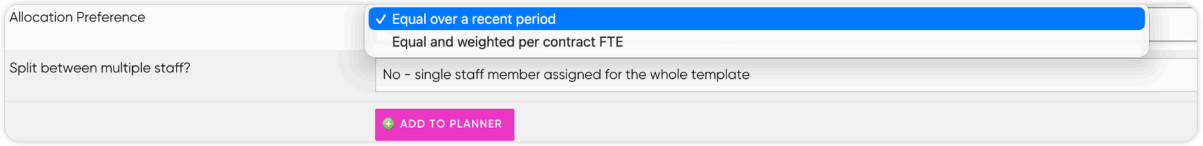
Until now, deployment patterns could only be assigned to a single staff member who would work all of the assigned deployments in that pattern. This update allows patterns to be split across multiple staff members. This means you no longer need to define each step of each pattern but build the required staffing coverage in your patterns and allow the system to allocate each fixed deployment to the best available staff member.

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This allows for more flexible deployment planning, particularly in combination with your deployment priorities and optional vs required deployments. Even use it to schedule breaks fairly amongst your team.

Fair deployment allocation based on contracted hours.
This new update brings the ability to give fair deployment allocation based on contracted hours. Previously, the system would look at two different contracts exactly the same, whether that be full-time, part-time, adjusted hours, or a full-time equivalent contract. Now, when you go to create a deployment template, there is an option that allows you to take contracts into account when assigning deployments.



In practice, what this means is that if you had 20 deployments in a week and two staff members who can do them, and one staff member is on 50% FTE, then they should receive half the deployments of the other person working full time.

4.2.3. Improved Timeline View

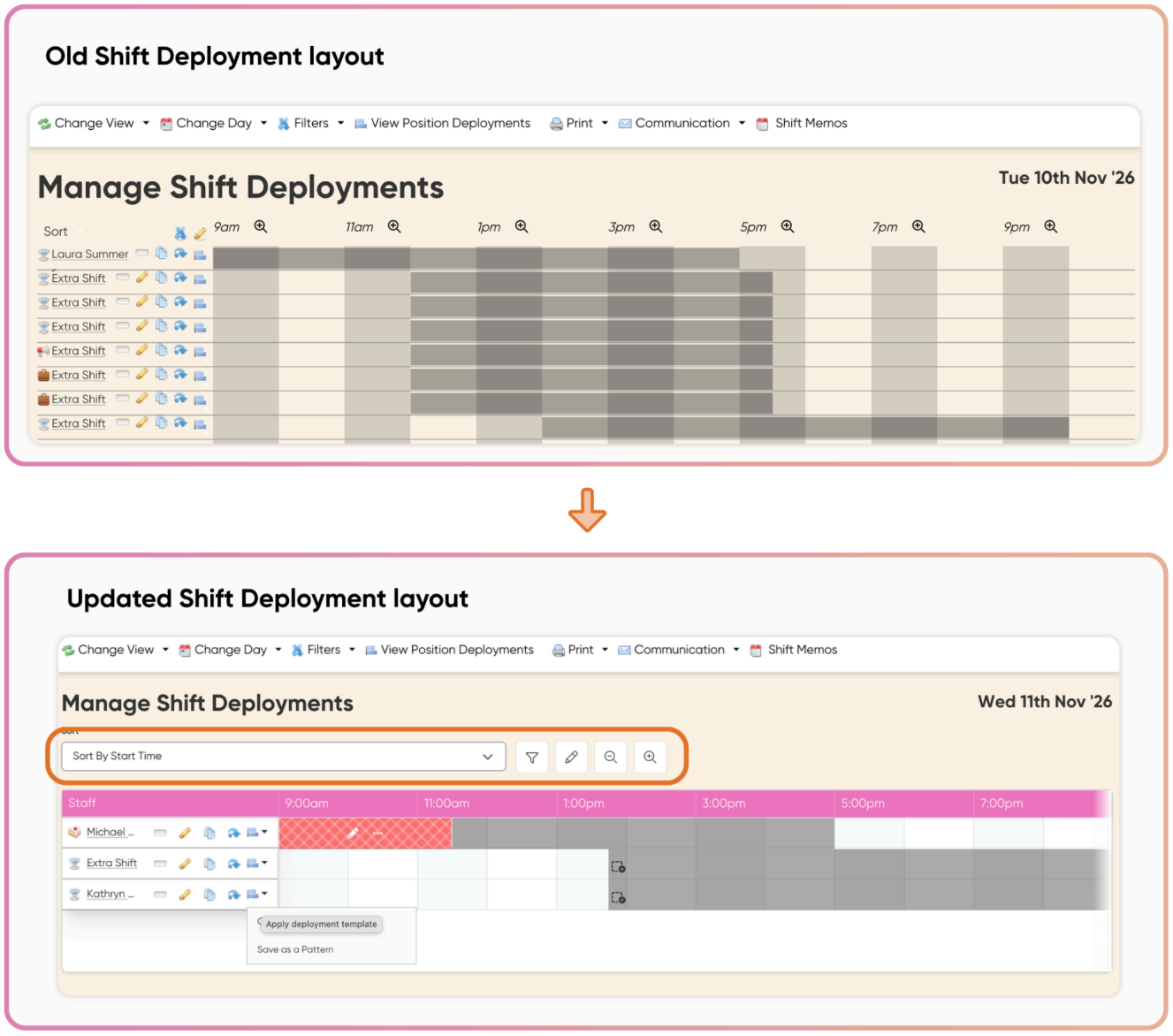
We have redesigned the timeline view in Shift Deployments to make it easier to use, more robust and smarter on mobile device screens. The main changes are:

- Timeline view now works on mobile.
- You can now drag the timeline on desktop and mobile, which also drags the time heading.
- The left column and top row are now sticky.
- Adding a deployment on mobile opens a modal instead of a resizable deployment block
- New deployment Modal includes start and end time on mobile only.
- Start and end time fields show when editing an existing timeline entry.
- Time fields validate against the overall shift boundaries with validation messages under the relevant input.

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- Sort, filter and edit timeline labels have now been moved outside of the table.
- Cursor pointer updated to signify the resize gesture (<> for resizing the deployment block)

Additionally, the format of your shift deployments on the desktop has changed. We have moved things around so there is more space and clarity in your view. We have added more colour to the deployment timeline to help it stand out. We have isolated the staff members so this section is also clearer. We have moved the Sort By options so that they are now in a bar above your Deployment timeline and moved our filter, edit and zoom buttons here as well.



4.3. Late Notice Shift Changes Compensation

These updates allow you to establish rules for shift changes and cancellations, enabling your organisation to maintain compliance with union requirements effortlessly. Additionally, if your company is based in the UK, these updates will help you comply with incoming legal requirements over Shift Change notice periods.

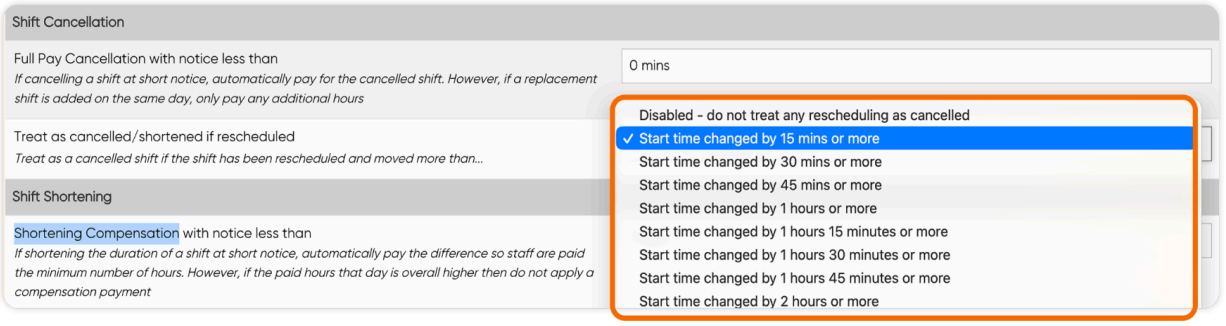
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4.3.1. Short notice shift cancellation payment

This option allows you to set up a cancellation notice period. To use, go to the **Manage Contracts** page and in the action menu select **Manage Contract Types**. When you go to edit a Contract Type, you will now see options pertaining to Shift Cancellation.

Cancelled shifts notice period

If a manager is cancelling a shift with little notice, the system can now automatically pay for the cancelled shift, depending on how much notice was given. For example, staff might expect a **Full Pay Cancellation** if their shift is with notice of less than 24 hours. The amount of time considered short notice needs to be set at your discretion (unless government guidance changes), but can range from as little as 0 minutes, 1 hour, to 14 days.
When enabled, this will automatically create a time entry that equals the cancelled shift at the point of cancellation. This will then appear for approval in the unprocessed pay and weekly time sheets.



It is worth noting that if this setting is enabled, but a replacement shift is found for the staff member (on the same day), they will only be paid for any additional hours lost that weren't covered by the new shift; i.e. if the first shift was 8 hours and the new shift was 6 hours, they would be compensated for the additional two hours.

Rescheduled shifts

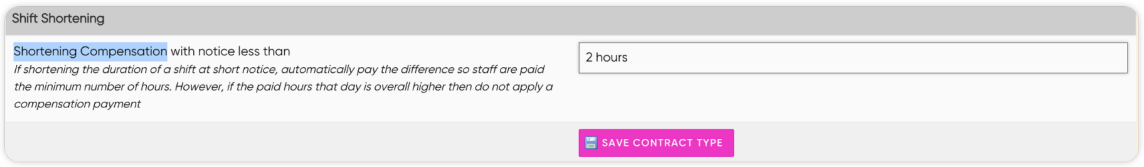
There is also the option to treat a shift as cancelled/shortened if the shift is rescheduled a significant amount. Meaning the staff member would receive the same compensation as a staff member whose shift was cancelled if their shift was rescheduled a significant amount.
Again, the amount of time considered to be significant is set up here by you and can range from their start time being changed by 15 minutes all the way up to 24 hours or more.

4.3.2. Short notice shift reduction/rescheduling payment

The second option that you can enable under **Contract Types** settings is the **Shortening Compensation**. This means that if a shift is shortened at short notice, the system will automatically pay the difference so that staff are paid the minimum number of hours. (However, if the paid hours that day are overall higher, then do not apply a compensation payment.)

Again, you would need to set up what constitutes short notice for your company. The range is the same as for shift cancellation, between 0 minutes and 14 days. This will then automatically create a time entry that equals the reduction in expected paid time (based on the shift at the point of change). This will then appear for approval under Unprocessed Pay and Weekly Timesheets.

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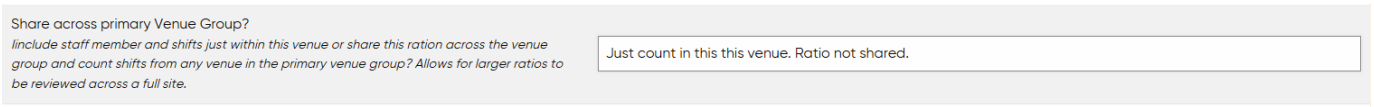
The system will also update the time entry if any connected time entries are adjusted. It will also factor in any additional shifts or extended working hours logged on the same day, for example, if a shift is reduced to 2 hours but the staff member actually works 3 hours.

4.4. Ratios across venue groups

Ratios are automatic warnings that appear when staffing levels drop below the required ratio for the activity listed. For example, ratios can be used as an alert if there are too few first aiders on duty for a particular crowd size. Ratios can be used for a variety of shift types, and can display multiple staffing ratios simultaneously under a single shift.

Previously, a ratio was specific to a single venue, but with this update you can share a ratio to an entire venue group, making it visible to all venues in that group.

This is a single setting that can be set up for each venue when enabling ratios.



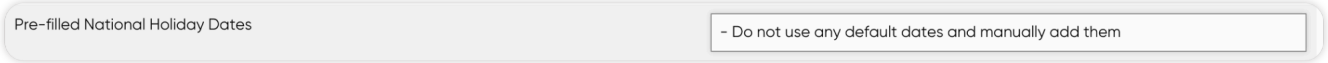
Once enabled, this will then show the ratio on all venues within the venue's primary venue group. It will also count all staff within the group and will count shifts from all included venues.

4.5. National Holiday Management Improvements

With this new release, we have added new options that allow you to customise your National holidays.

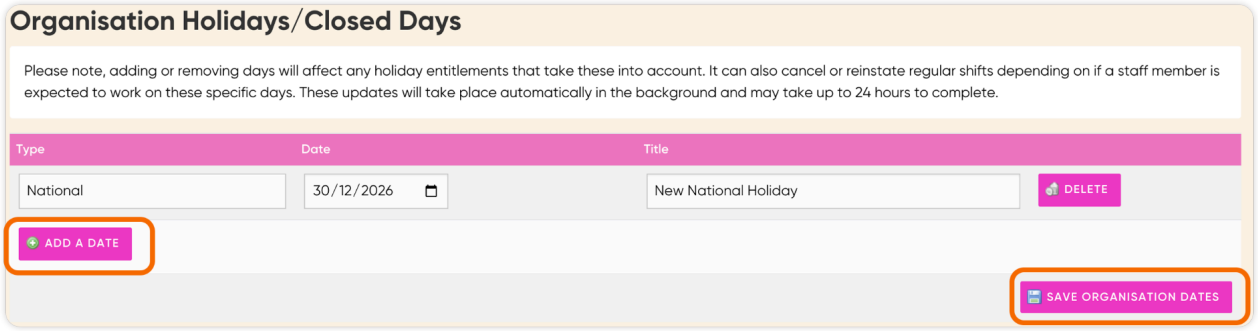
4.5.1. Add your own national holiday dates

The latest update allows, you to full customise and to your own national holidays. Now in Global Settings, you have the option to remove all national holidays. This option is under Pre-filled National Holiday Dates, and to create your own customised set of national holidays, select the 'Do not use any default dates and manually add them' option. This resets all national holidays in the system to zero.



If you select this option, you can then start to add new holidays under the **Organisational Holidays** page. To set this up, go to the Organisational Holidays page and scroll to the bottom of the page. There is the option here to manually add the dates you want to include. For each new holiday, you will need to set up a date and a title

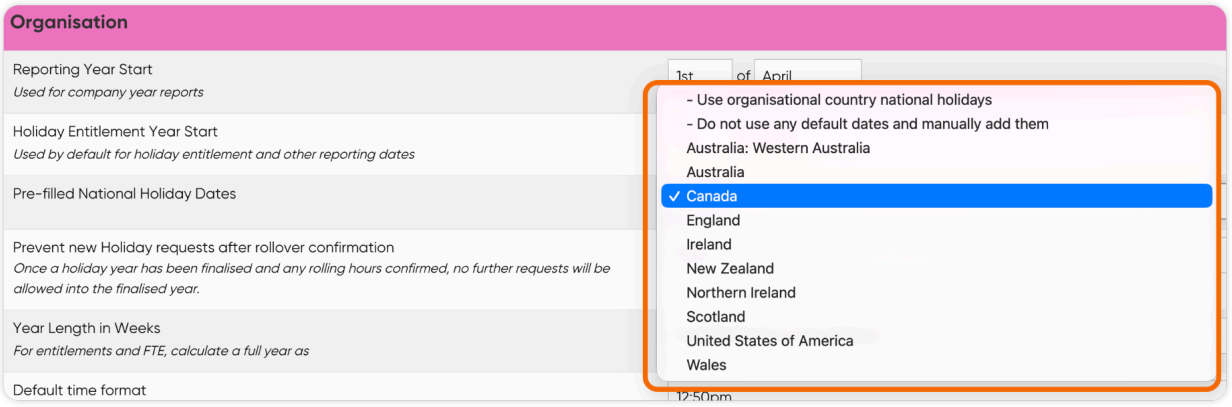
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When you go to add a Holiday, you can also choose to set it as either a Company holiday or a National holiday.

4.5.2. Pre-defined holiday dates

This update also provides more country options that the system will use to configure your National Holidays. This can also be set up in your Organisation settings in Global Settings. You can choose from several countries including: Australia, Western Australia, New Zealand, Canada, United States, England, Scotland, Wales, Ireland or Northern Ireland. This is to make your national holidays better reflect the region your company is operating in.



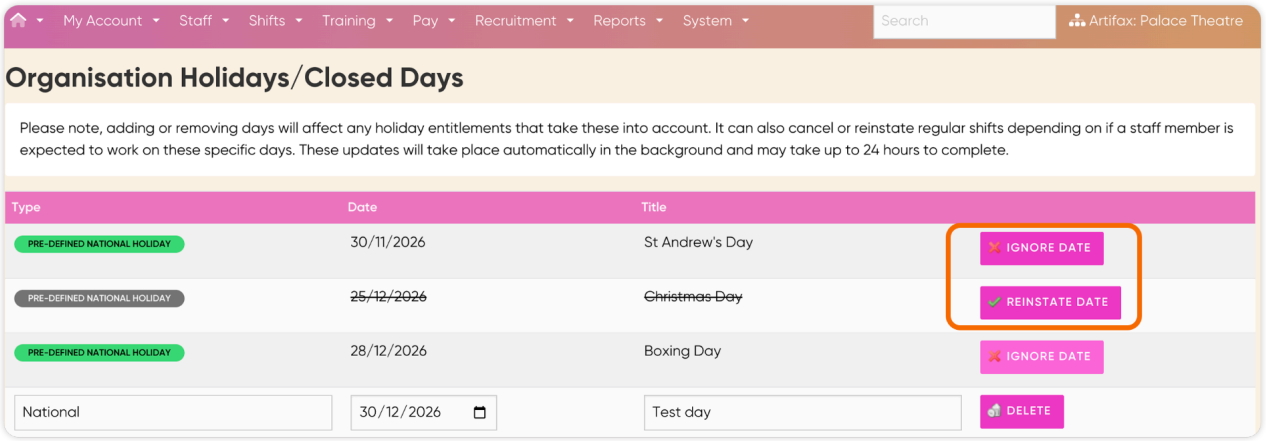
You can then view all of your holiday dates under the Organisational Holidays page, which is also where you can add organisational holidays and additionally where you can edit or add any additional holidays.

4.5.3. Ignore a single pre-defined holiday date

You can now ignore certain national holidays so that they do not count towards national holidays. The system automatically includes all national holidays; this option allows you to ignore them. This can be helpful if your organisation has a system where they ignore bank holidays and staff are able to take leave at other times of the year. It can also be helpful if your company is open during national holidays.

Under the Organisational Holidays page there is an option to click an option to ignore a holiday. If this was done by accident, there is also the option to reinstate the holiday.

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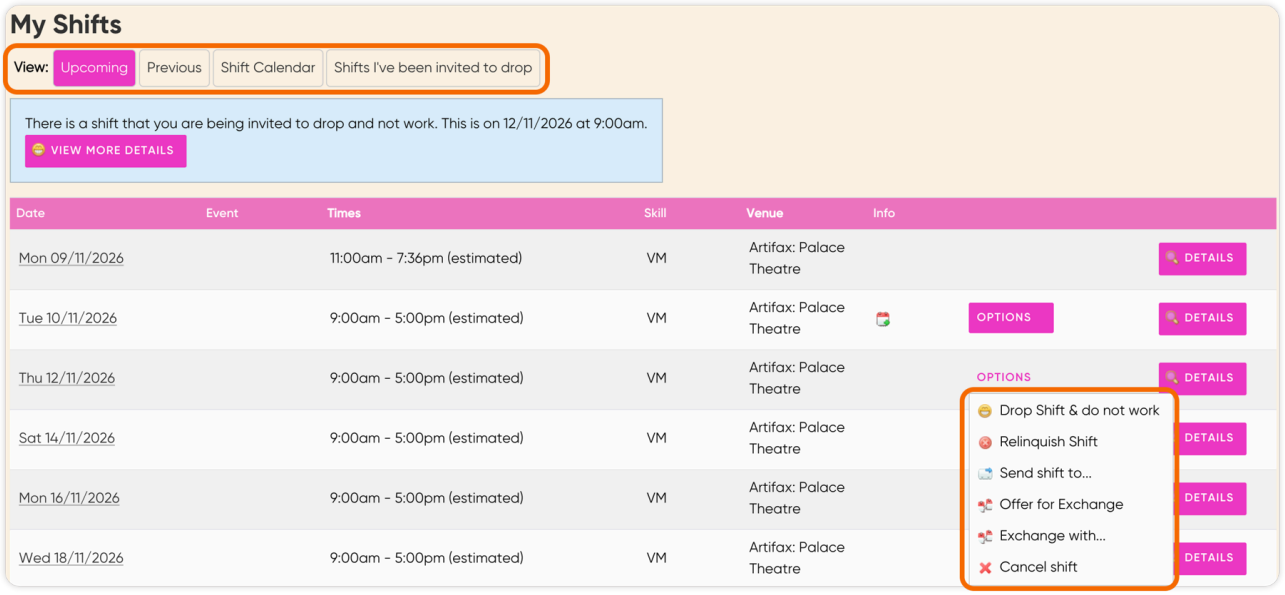


Please note, adding or removing days will affect any holiday entitlements that take these into account. It can also cancel or reinstate regular shifts depending on whether a staff member is expected to work on these specific days. These updates will happen automatically in the background and may take up to 24 hours to complete.

4.7. Improved Exchange process

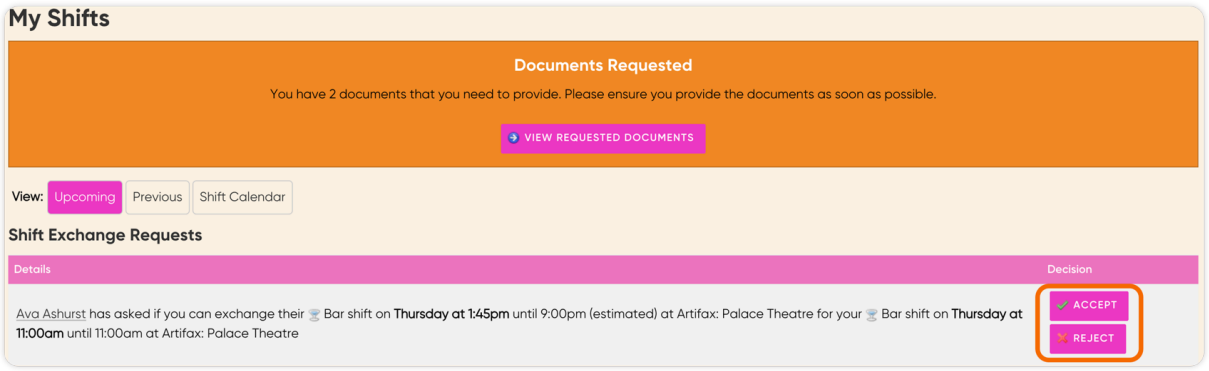
With this update, we have improved the exchange shift process from the **My Shifts** page, so that now when staff post their shift for cover, they can receive offers to swap rather than requesting one exchange at a time. This method allows a staff member to offer their shift up for exchanges. Other staff members can then “offer” their shifts in exchange for the one listed.

To set this up, select the options button (next to the shift you want to exchange). From the options drop-down, choose Offer to Exchange.



The shift will go into **Available Shifts** and be marked as **Exchange,** with the button saying **Offer Exchange**. Staff can then offer any number of shifts to swap for the offered shift.

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The original staff member can then choose which shift they will exchange (from the My Shifts page).



Staff can only swap shifts if the following criteria have been met. Firstly, the shift has not been locked; secondly, there are other staff members with the same skill available to work; and finally, the requested staff member accepts the swap.

Staff can also cancel the request by going back into their options and, in the drop-down, selecting Cancel Request.

It is also worth noting that the shifts exchanged do not have to be the same length, and staff can swap their shift for a shift that is longer (or more coveted). The one limitation to this would be if the shift you were requesting to exchange was much shorter, to the point that it would mean you would be under your contracted hours.

When approved, the swap is made instantly and simultaneously.

4.8. Feedback Forms Improvements

Previously, Feedback forms were limited, with no version control or management features. This update adds more management options, including the ability to preview your form before it goes live, set a category, and remove any unnecessary forms. Additionally, you can now copy a form, making it easy to duplicate standard questions and quickly tailor them as needed.

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It is important to note that Feedback forms are version-controlled. This ensures changes can be made to documents without interrupting the flow of forms already in progress.
When you create a new feedback form or edit an existing one, you are making changes to a draft. Once you have completed your changes, publish the draft to make the changes live and ensure applicants are using the most up-to-date form.

Any applicants who have already started the form on an earlier version will complete their forms on that version and won't be moved to the latest version.

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

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