StaffSavvy

User Guide:
New Features & Changes
in v2021.2.0

1. New Features

This release focuses on expanding the available features for some of our newer tools. We have also added a new integration with Xero and Single Sign On support based on SAML. One major new feature is our new Goals tool which allows target setting, tracking and review for staff members.

There have been a number of changes and improvements to core features in the system and we recommend you review the changes list carefully.

1.1. Changes to Current Version & Recommended Actions

There are several functional changes within this update that are designed to resolve historical issues and improve the system for all users.

List of key functions affected by this update:

- **Date & Time Selectors**
  This update replaces the previous drop down boxes to choose both dates and times in the system. They now use browser-based selection tools. This should make it much easier to choose the correct date on different devices. Time selectors are also better on mobile devices and for accessibility.
  Recommended Actions:
  - It's recommended that you review some examples of these new selection boxes such as on the request time off/holiday/vacation section so you can see how they work in your browser.
  - The new selection boxes also make it easier to type the time using a keyboard to type in the date.
  - The format for the selection boxes will be based on your browser location settings which should ensure a better experience.

- **Migration of data to Data Fields**
  StaffSavvy previously had a legacy tool to store private data within the system. This data was shown within the Private Details pages. This legacy tool was not well suited for customisation or the increasing requirements of various regions and organisations. The tools were also limited in some of their functionality. To ensure the best experience and to allow more features and management options in the future, all of the data that was held on the private details page has been migrated to data fields.
  The private details page has been removed in favour of a single page for updating details.
  Managers (and staff) can update details directly on their profile pages now too rather than needing to find the location to update the information.
  Recommended Actions:
  - Check all of your required data has been copied over successfully. Previous data will be stored securely until the next release in case of any issues with the migration. Contact support if you have any issues.
  - Check you are happy with the new data fields that have been enabled for you. These are based on the previous data packets that could have been enabled under the Global Settings page.
    The new data fields are now enabled and managed under the System > HR > Data Fields pages.

- **Holiday/Vacation claims on multiple contracts**
  This update makes it possible for staff to claim holiday/vacation requests against secondary contracts on their account. Previously they could only claim against their primary contract. Secondary contracts where staff are paid their holiday entitlement in hours automatically are unaffected.
  Recommended Actions:
    - Any secondary contracts should be checked to ensure the holiday/vacation allowances are correct.
    - Primary contracts where the entitlement has been manually adjusted to cover secondary contracts should be updated.

- **Approving holiday/vacation absences where there are shifts being put up for cover (rather than cancelled) will list the absence as tentatively approved until shifts have been covered**
  This is only a language change that will affect a very small number of situations. If a holiday/vacation request is approved but the option is chosen that the staff member retains responsibility for finding cover for their shifts then the system will flag the absence as tentatively approved.
  As soon as the shifts are covered (or cancelled by a manager) then the absence automatically changes to approved.
  Any request where the staff member has no affected shifts or the shifts are cancelled or reposted for cover without them retained responsibly will be unaffected.
  Recommended Actions:
    - If you are affected by this change, please ensure your in-house documentation is updated.

- **Standardising languages throughout the system**
  The words Rota and Roster have started to be removed from the system. The Rota Creation/Roster Creation section in the menu has been replaced by ''Schedule Creation''.
  We’ve also standardised various page titles throughout the system to make it more consistent.
  Recommended Actions:
    - Please update any in-house documentation that references the old titles.

- **Photo Wall & Quick Search for staff is now covered by the staff directory permission as they display similar data**
  Previously all staff had automatic access to the photo wall within the system but only for colleagues they worked with. This page is now linked to the staff directory permission as they contain the same data and search capabilities.
  The directory and photo wall are safe to share among colleagues as they only contain self-uploaded profile images and their names.
  The global quick search is also now subject to this permission when searching for staff names as it allowed the same functionality as staff directory.
  Recommended Actions:
    - Review and check the correct levels have access to the staff directory permission to maintain access to the photo wall & quick search for staff members

1.2. Headline New Features

Below is an introduction, we've also gone into more details about these features later in this document.

- **Single Sign On Support**
  Single Sign On (SSO) is the ability to have a single login on a central system which grants you access to all of your other software or services.
  StaffSavvy now supports SSO via SAML. This will need to be carefully configured by your technical team within your SSO system and the StaffSavvy Global Settings > Integrations page.
  With SSO enabled, you can use this alongside normal logins or disable StaffSavvy email & password logins completely.

- **Goals**
  This new feature allows for goals, objectives or targets to be set by staff or their managers within their account. Goals can be either linked to StaffSavvy features such as training certificates or they can be bespoke goals covering anything at all.
  Goals using a StaffSavvy element, such as certificates, will automatically update and be marked as complete when the certificate has been awarded in the system. This makes the process seamless and automatic.
  Bespoke goals can be updated by the staff member and their managers alike and marked complete by their managers.
  Goals also allow for updates to be posted (with optional notifications to line managers) and for percentage complete status to be attached.

- **Xero Integration**
  This payroll & timesheet integration directly into the Xero platform. Once you have completed a wagesheet, you have the option to start your data sync and push all of the time entries up to Xero.
  The integration will automatically match up StaffSavvy accounts with Xero employee accounts using their email addresses and details. Link your pay elements in StaffSavvy to your Xero pay codes and easily push paid hours directly into your Xero timesheets.
  We currently support Australia, New Zealand and UK Payroll connections for Xero.
  Speak to our support team with help getting this setup while the integration is in beta testing.

- **Custom Reports Access**
  You can now grant access to custom reports based on access levels so certain reports can be displayed to supervisors or managers. Access can also be limited to staff at their venues or staff they are line managers for.
  You can also now choose to choose the Custom Reports directly in the menu which allows colleagues to quickly find the commonly used reports. They also display within the search tool.

- **Additional holiday/vacation entitlement based on length of service**
  You can now great Length of Service Entitlement groups that can grant additional days or hours of holiday/vacation entitlement based on the length of service of the staff member.
  Each group can have different entitlements allowing you to have different benefits for different contracts.
  Once created, you can choose a Length of Service entitlement group for each contract and the system will

automatically add the eligible additional days or hours to the staff members.

- **Multiple Contracts can each have holiday/vacation entitlement and staff can claim against each contract**
  Previously the system would only allow holiday/vacations to be booked against the primary contract within an account. This means that staff can now earn additional holiday under a secondary contract and claim these hours or days when requesting holiday/vacations.
  Profile pages will now display each holiday entitlement for each of their contracts.

- **Venue Groups on Shift Week view**
  Previously the shift week view would allow you to see multiple venues but they would always be "split" meaning staff appeared in multiple parts of the page if they were in multiple venues.
  This update allows you to change between splitting the venues or seeing them all together. When viewing them all together, there will be a single list of staff and the shifts will be colour coded based on the venue that the shift is taking place at.
  You can view and set the colours under Manage Venues.
  Shifts can be moved between views by using the edit button on a shift making it easy to move staff around your organisation.

- **Improvements to Artifax Events Integration**
  - **Update Artifax resource bookings with scheduled staff and optional information such as duration and costs**
    This allows you to have shift allocation information displayed directly within Artifax. Turn this on under the Global Settings > Integrations > Artifax section.
    This feature requires the shifts to be created using the Convert Resource to Template option within the shift scheduler or using the Add Shift option within the Resources section of the shift grid view. This is so the system can correctly match the shift to the Artifax Resource.
  - **Artifax Resources will now display a summary of existing scheduled shifts with an option to Add Shift on the grid view to quickly add additional shifts**
    This will help manage changes within the Artfiax Resources as well as easily identifying missing resource requirements. The quick Add Shift option will mean missing shifts can quickly be added.
  - **The integration will now load information from the arrangement and allow them to be over-ridden by the details on event if they are set there too.**
    This allows custom fields in Artifax to be set on either the arrangement or the event and the most pertinent information loaded and displayed in StaffSavvy.

- **New Report: View a week of availability**
  This new report allows managers to browse all of their staff and see their general availability for a week of time. The report will show a miniature timeline for each staff member and for each day during the week. The timeline shows green when they are available, orange patterns when they have asked not to work and red stripes when they are not available at all. This availability is based on all information from their account including expiring documents and other complex requirements however it ignores all limitations on maximum hours or enforced rest.

1.3. Additional New Features and Improvements

- Improvements to Performance & Welfare Forms
    - Forms can now have follow up forms automatically scheduled (or allow managers to adjust the schedule). This automatically creates and allocates the new forms plus gives quick access to view the previous form in the series.
      To use: Edit or create a new performance form. On the details page, you will see the options to add a follow up form.
    - Forms can now have ''pauses'' between phases. This allows part of the form to be completed, a pause for a fixed time period of at least a day and then the next phase will be requested. This includes automatic notifications and the forms remain visible to those involved during the pauses.
      To use: Add a new phase to a form and choose the pause option from the list of who will complete the phase. The phase will be empty as it's just a pause between other phases.
    - Forms can now be deleted by managers who have access to assign the forms. View the form itself to see the remove option.
      To use: view the performance form via your notifications or the staff member's profile. In the actions menu will be a remove form option.
    - Forms can now have optional questions as well as the standard required questions.
      To use: when editing the questions within a form, you can change it between required or optional using the More menu button
    - Forms can now be displayed in full to the assigned staff so they can see upcoming questions from all future phases so they can see how the form will unfold.
      To use: Enable the option when creating a new form or editing the details for an existing form. This will then show all of the questions even if it's for a future phase. Staff will not be able to complete these future questions.
    - Forms can now be 'sent back' to the previous phase if the previous staff member needs to make changes. The completer of the current phase has permission to do this.
      To use: view the performance form via your notifications or the staff member's profile. If the form is still in progress and has progressed past the first phase you will see an option to return the form to the previous phase in the actions menu.

- **Recruitment Improvements**
    - Blinded and unblinded application forms can now be downloaded as PDFs from the recruitment portal.
      To use: Simply use the download option from the Applications page on a position and choose the export option for blinded or unblinded.
    - Recruitment Applicants can now be transferred between positions if they are better suited to a different position.
      To use: A manager for the recruitment positions can use the transfer option on the application itself.
    - Added the option to score applicants out of 10 instead of out of 5 when using scoring shortlisting.
      To use: edit the details of the position and choose the score out of ten option for shortlisting.

- Added the option to resend interview invites to those who have not yet booked an interview slot. *To use: This option appears on the shortlisted applicants page above the list of applicants once the invites have been sent.*
- Added the option to view application scores as a total of each question or as an average per question. This allows two different ways to view a score per applicant.
  To use: edit the details of the position and choose the preferred method of score calculation
- Adds a notification on an applicant's application if they have other option applications in progress, pending offers or recently accepted positions with notes on the applications and links (if the viewer has access).
  To use: view the application form. If there are additional applications from the same person then this will be displayed in the top right corner.
- Custom reports now allow reporting on recruitment positions so you can view summary information such as number of positions filled per position.
  To Use: Create a new custom report and choose the Recruitment Positions report type. This will allow you to view a summary of the current status for each of your active positions.
- Additional layout option for recruitment portal's footer area to allow for common design layouts. This will be most useful for design teams.
  To Use: this layout option is available on the design tab for managing the recruitment portal. It will change where the footer is positioned within the page and is designed for advanced users only.
- Figures displayed on In progress applicants will only include those who have actually answered some of the questions rather than opened an application form.
- Applications can now be marked as withdrawn by managers rather than rejected (silently) so the correct reason can be shown in the record.
  To use: choose this option when setting the decision for applications
- Successful applicants can have their leaving date set to be their contract expiry date automatically. Enable this option on each position so that the successful applicants will have their leaving date set by the system.
  To use: enable this option within the edit details page for the position. This will automatically set the leaving date for the applicant to be their contract expiry date.

- **Existing physical contracts can be uploaded to the contract history page**
  This means that existing paper or previously signed agreements can be uploaded to the contract history which will prevent staff members being asked to sign new digital copies within the system.
  To use: go to the staff members contracts and use the Upload button next to their agreement. If no document is uploaded, the system will fall back to using the digital contract documents if assigned to that contract.

- **My Messages Improvements**
  - We've added a new search tool to the my messages section allowing you to search for your current and archived messages quickly and easily.
  - Archived messages can also now be restored back to your current inbox easily. This allows you to keep your active messages on one screen but still have access to your history.

- **New accounts without system access or emails**
  You can now invite staff into the system but choose not to notify the staff members and mark their account as in setup. This means they will not receive notifications until they are invited into their account

under the Manage Staff page.
To use: Under the Staff > New Staff > Invite Staff page, set the first option "Instant Access?" to "No - create the account but do not inform the staff member yet".
Once you are ready for them to have access go to Staff > Staff Settings > Manage Staff and use the More button to select Send Invite.

- **Awards: Access to nominate any staff member for an award even if you don't have access to their account**
  This is a new access permission which allows them to access a nomination page where any active account in the system can be searched for to allow them to nominate that staff member for an award.
  Note that this permission will give the access levels permission to see names and profile images for all active accounts in the system.

- **Resource Library: you can now add performance forms and digitally signed document types to your resource library**
  This makes it easier for staff to find your forms and action them digitally. Note: when selected the staff member will be automatically assigned the form or document to complete.
  To use: Simply add a new item to your resource library and choose the performance form or document type from the list.

- **New Trigger Events**
  These new events have been added to triggers so you can create actions when any of them happen within the system.
    - on a certain duration of absence (for requesting documents and forms)
      This event will also allow you to request documents be uploaded and link these documents to the absence that triggered the event. For example, you can request doctors notes automatically via a task and the system will automatically attach it to the correct absence.
    - on a certain period without a time entry
    - when an award has been approved
    - when a new expense has been added for review.

- **Absence Periods can now have documents uploaded to them**
  This allows for documents such as sickness notes or completed forms to be uploaded directly to the absence. The uploaded documents will also be available within the staff member's document store.
  To use: view the absence report via the staff member's profile. The report will list each of the absence periods. Use the Add Document option at the top of the absence period. This will add the document to their document store and keep it linked to this absence.
  Once a document is attached to an absence, you can use the Documents button on the same absence report to view all documents attached to the absence.
  You can have as many documents on an absence period as you need,

- **Field Sets can now automatically request review and update of data on a schedule (e.g. yearly) by the staff member**
  Simply set the review period on each field set and the system will display reminders and call to actions to confirm the data is up to date to the staff member.
  To use: edit the data field set and choose a review period. Once saved, the data set will check and request

staff review the details at the set interval. This will be done when they log in and it can be dismissed until the next login.

- **Single Shift Editing: choose the venue**
  When editing a single shift you can now choose the venue which makes it easier to move shifts around your locations.
  To use: simply choose the desired venue when editing a shift. Please note that this might remove the shift from the current view you are using if that destination venue is not currently being managed.

- **Venues can now be ordered within Venue Groups**
  This allows you to choose the order the venues will be displayed within the various shift management pages.
  To use: Simply edit the venues within a group and drag them to the desired order.

- **Holiday/vacation approval pages can now be filtered to direct reports only.**
  This will update your notifications panel too so only notifications for the desired staff will be displayed.
  To use: visit the Holiday/Vacation Approval Report under Reports > Staff Reports in the main menu. Using the actions menu option, choose just to show direct reports.

- **External Worker's Name**
  You can now name shifts that external supplier accounts have been assigned. This allows you to add notes of the name of temporary, agency or bank staff who will be working the shift.
  To use: As long as the assigned account is an external supplier account, the option to enter a staff member name will appear when editing that specific shift. Simply enter the name and click save. This name will then appear on the manage shift pages.

- **Contract document review**
  When contract approval is enabled, the approval page now allows managers to preview the assigned contract document that will be sent to the staff member to sign. This allows them to see all the mail merge tags and the extra contract document.
  To use: When approving the assigned contract, you will see the option to preview the contract document. Please note that if the contract document is updated before signature then the updated version will be one presented to be signed.

- **Contract signature reminders**
  We'll now automatically send weekly reminders to staff who have not yet signed their contracts within the system.

- **Locking Pay Elements**
  Pay elements can now be locked to use the default role's pay element using a setting on the contract. This means the staff member will always be paid their default role's rate of pay for any roles they work within the organisation. This helps to keep the admin time lower as all roles will be paid the same without manually setting each role's rate.
  To use: On a contract under the Shifts and Time entries tab, choose the option to lock their pay rate to their default role's rate of pay.

- **Remote Clock In Breaks**
  Remote clock in now allows unlimited breaks if the time entry is unplanned. This matches the existing process on the clock in screens.
  To use: when clocked in remotely without a shift, the break option will appear.

- **Shift Memo Notifications**
  Staff can now be sent email notifications for new memos added to days they have scheduled shifts for (if they have access to the memos).
  To use: Staff need to enable this notification under their notification settings (My Account > My Details > My Notifications). You can request StaffSavvy support to apply this to all accounts manually for you.

- **Contract manipulation rules additions**
  - Rules can now assign an additional time entry with a different pay element automatically to allow splitting of overtime / bonus payments on top of hourly rates
  - Rules can now assign an additional pay item when the criteria are met. This is perfect for additional payments to cover meal costs or long shift payments

- **Contract restriction rules improvements**
  - Can now have custom messages added to them to allow you to easily see which type of rule is being assigned. We'll default to showing the system generated messages.
  - Can now be set to enforce a rest period after working a certain length of shift. This is similar to the basic reset restriction but allows additional options such as manager override.

- **Shift Week view now allows you to choose the time formatting for this page.**
  Choose it using the Time Format option at the top of the page. This will only affect this page as the unique width of the page means smaller screens will benefit from narrower time formats.
  To use: under the week view option choose the time format within the Actions menu at the top of the page. Note that wider formats might make it harder to manage shifts on smaller screens.

- **Automatic Holiday/Vacation time entries can now be calculated to 0.00001 of a minute rather than the nearest minute.**
  This allows for more accurate reporting of holiday/vacation percentages particularly for short shifts.
  To use: Choose your rounding within the Global Settings > Configuration Tab > Time Entries section

- **Search for Employee Numbers**
  Manage Staff page now accepts any of the employee numbers when searching so you can find an employee quickly using their payroll number
  Simply search for the required number on the Staff > Staff Settings > Manage Staff screen

- **Employment Eligibility Date Warnings**
  Employment Eligibility console will now warn managers if start dates are before the documents being uploaded. This helps to highlight disparities between the legal approval date and the listed start date.

- **You can now set a custom expiry date for personnel records when creating a record on an account**
  This allows a custom expiry date to be set on the record rather than using the default expiry date.
  To use: add a new record. When adding the record, you'll see the Active Duration period shown. To the

right is a Set Expiry Date button. This will allow you to set a bespoke expiry date for that record.

- **Unprocessed Pay can now be filtered to see just time entries or just expenses (or both)**
  To use: Under the unprocessed pay page, use the filter options in the top right to choose between the different types of expenses and time entries.

- **New notification within the dashboard for line managers to indicate when their direct reports have roles that are expiring**
  This helps managers to be aware of requirements for their staff which are due to expire in the next few weeks.

- **iTrent export file now includes actual worked hours as well as paid hours.**
  This is an additional column at the end of the file called Worked Hrs
  To use: this column is included by default

- **Visibility of some available shifts that cannot be taken due to reasons within the staff member's control will now be shown on their available shifts**
  This option simply allows the staff member to see shifts which they could take if they provided additional documentation, completed training they have been assigned or exchanged shifts rather than tired to work extra hours.
  This doesn't change their access to accept the shifts; it purely allows them to see that those shifts would be available to them under slightly different circumstances.

- **Over 125 fixes and micro improvements to the system**

1.4. Improvements released as patches since the last major release:

- Improved the search feature when looking for staff members using full names or nicknames
- Improved the weekly time sheet view so all entries (including archived staff) are shown. We've also included a new print option that only prints entries worked within the current venue or venue group.
- Resolved an issue with wage sheets when filtered by contract types. This would also previously take a long time to calculate. It is now instant.

1.5. Features removed in this release:

- Staff Data Fields shown under the Global Settings have been removed. They have now been migrated to data sets.
- The Private Details page has been removed with the data editable on profiles and/or edit details pages.

As always, please get in touch if you have any questions or suggestions. Email us at support@staffsavvy.com

2. In Detail...

2.1. Single Sign On Support

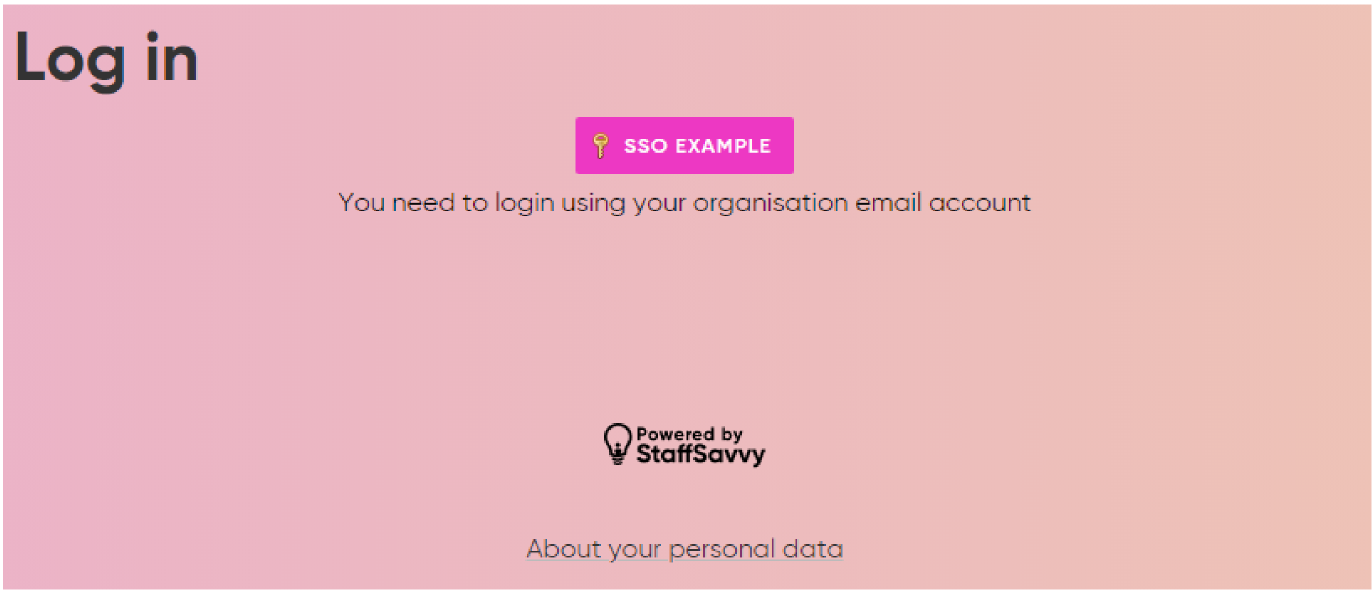
This release brings the ability to link StaffSavvy to your identity management platform. Single Sign On via SAML will allow you for force staff to security log into your normal systems and this action grants them access to their account on StaffSavvy.
There are a few requirements:

- Accounts must exist in both systems already
- Email addresses used within StaffSavvy much match those used within your Identity Provider
- Your Identity Provider must support SAML and allow you to specific a custom connection

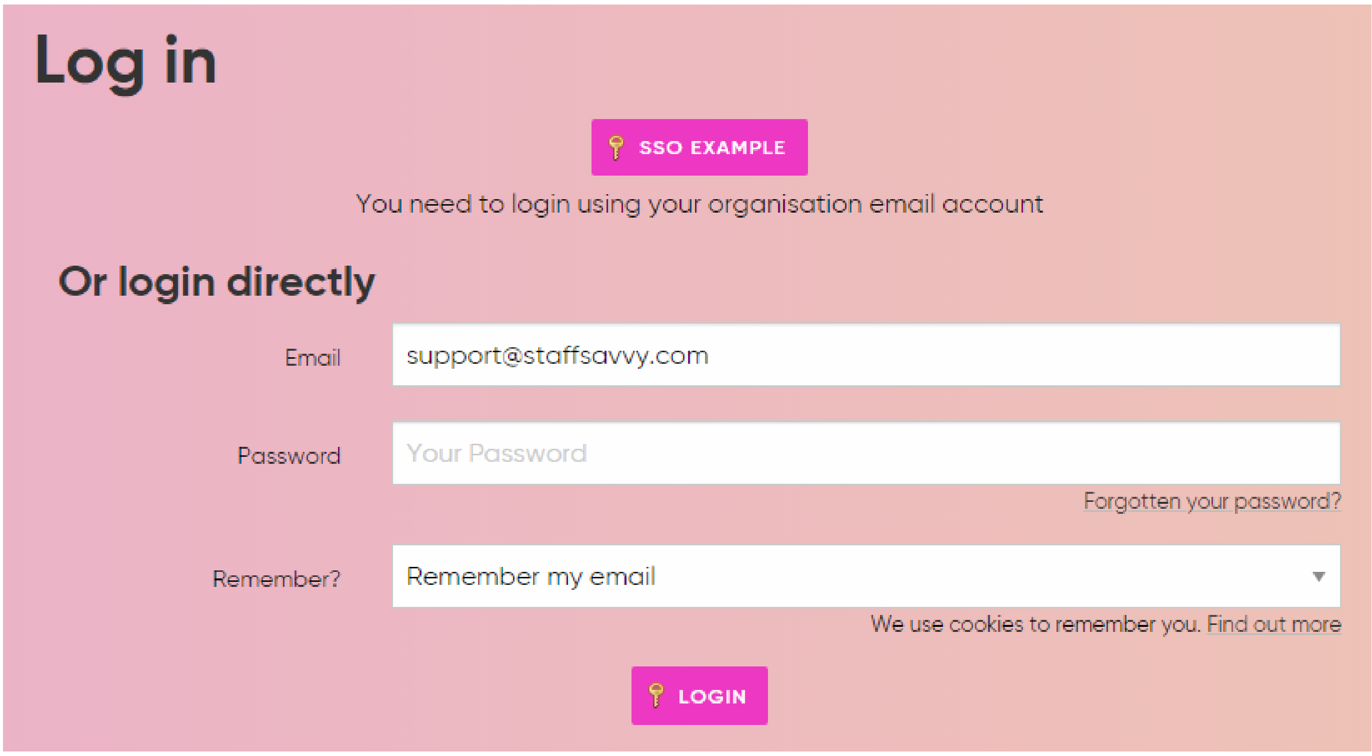
Standard instructions for the configuration of the connection are detailed below. If you have any issues, please discuss this with our support team. Please note that this is an advanced configuration option are we're only able to support the StaffSavvy side of the integration.

1. Under the Global Settings > SSO tab, enable SAML Single Sign On
   Note: do not disable the "StaffSavvy Account Sign On" option until your connection is setup and tested successfully.
2. Complete the Identity Provider Details section
   a. If you require self-signed x509 certificates, we recommend this free service: https://developers.onelogin.com/saml/online-tools/x509-certs/obtain-self-signed-certs
3. Click Save once your Identity Provider Details section is complete.
4. Complete the Login Screen section fields to ensure your staff are correctly informed of how to login and who to contact if they have any problems.
5. Download the Metadata XML as available under the SAML section
6. Upload this Metadata file to your Identity Provider.
7. Test the connection and ensure you can log in correctly.
8. Test with connection with a sample of your staff accounts
9. If desired, disable the StaffSavvy Account Sign On option from your SSO tab of Global Settings. This will force your SSO option to be used to log in

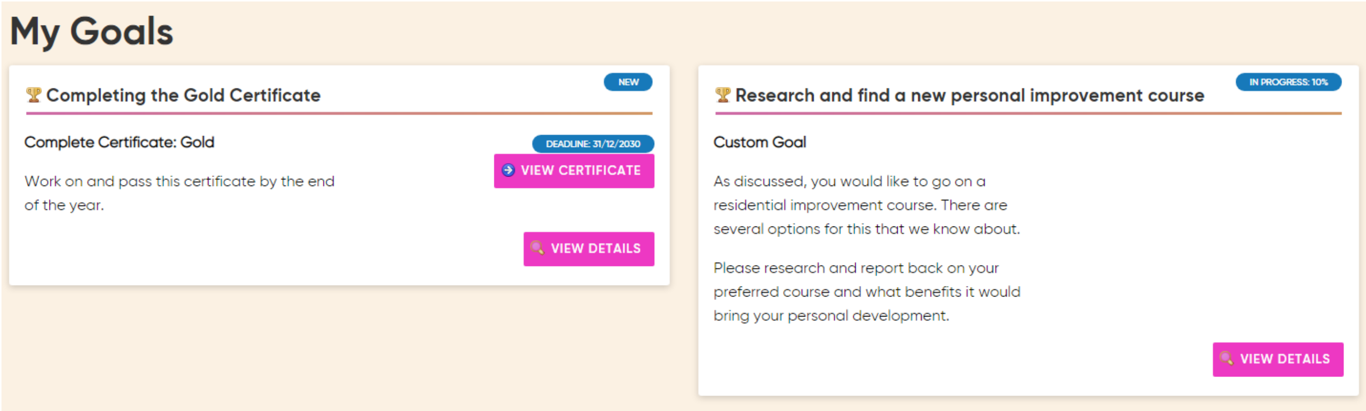
StaffSavvy Login with just SSO login allowed:



Login page with optional SSO:



2.2. Goals

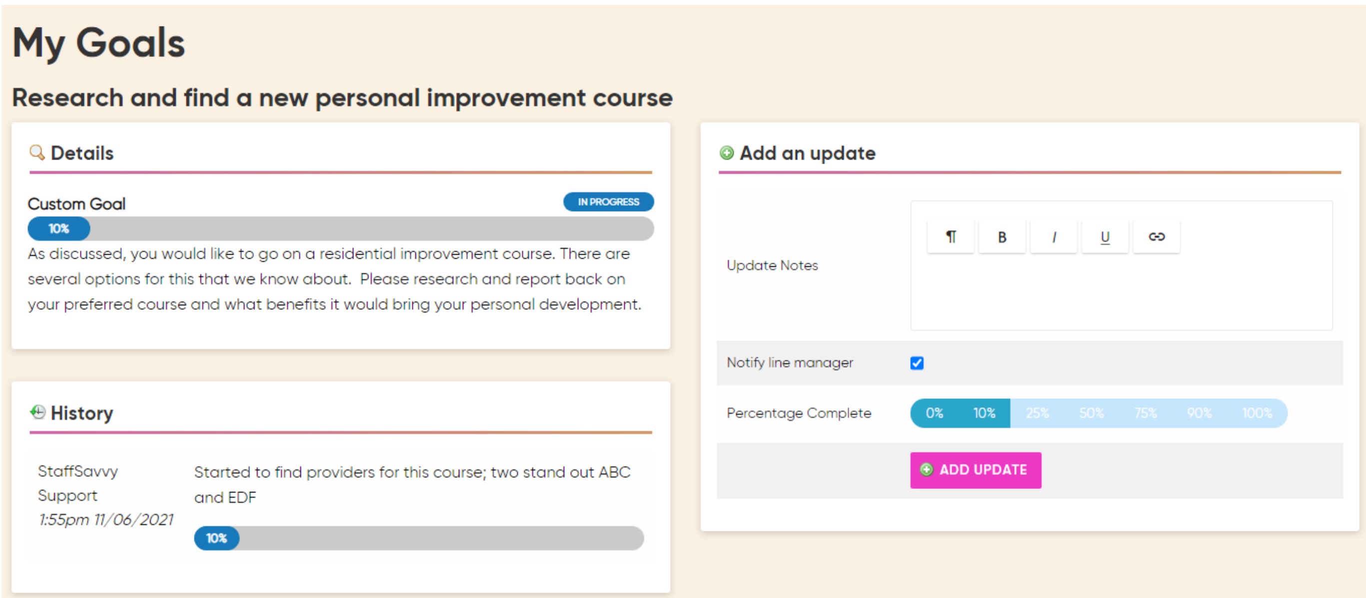


Goals are a great new feature to complete our basic performance management toolset. Goals can be enabled in your global settings > features tab.

Each staff member can then have goals added to their account; these can be connected to one of the standard StaffSavvy features; training programs, training certificates, awards and roles.
You can also add a custom goal that is not linked to another StaffSavvy item and this can record completion for any task.

For the linked goals, the system will automatically track the goal and will mark it complete once the other item is complete too. So when a training certificate is passed, the goal will update to be marked as completed.

All goals can have status updates and notes assigned to them by staff members or managers so a record of progress can be kept. Custom goals can also have a percentage completed to show how they are progressing.



All goals have a dedicated page where you can view the latest status of that goal and any updates to the goal itself. Updates can be automatically notified through to the staff member or line manager depending on who is adding the comment.

Once a staff member marks a goal as complete, it will remain on their list until a manager confirms completion. A complete history of goals is available via the staff member's profile.

Goals can also be integrated directly into performance and welfare forms so that their previous status is saved and any updates made during editing the form are also stored. This is perfect for reviews, 1-2-1's, appraisals and probation reviews.

2.3. Xero Integration

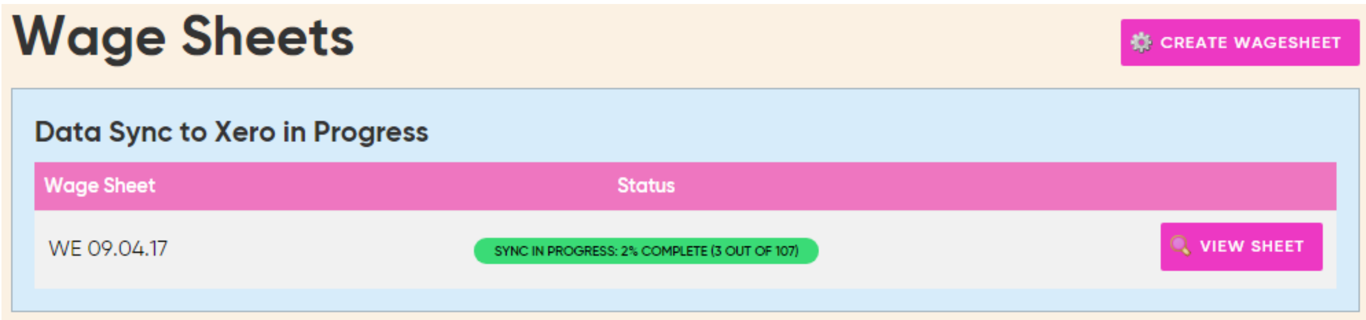
The Xero integration is a brand new API-based link that will sync staff accounts between the two systems and push the latest wage sheet time entries directly to your payroll time sheets in Xero.

As this is a brand new API connection, please speak with our support team to ensure this is configured and tested correctly.

You will need to add the StaffSavvy app to your Xero system and grant the requested accesses to your system.

The integration will automatically match up StaffSavvy accounts with Xero employee accounts using their email addresses and details. Link your pay elements in StaffSavvy to your Xero pay codes and easily push paid hours directly into your Xero timesheets.

We currently support Australia, New Zealand and UK Payroll connections for Xero.



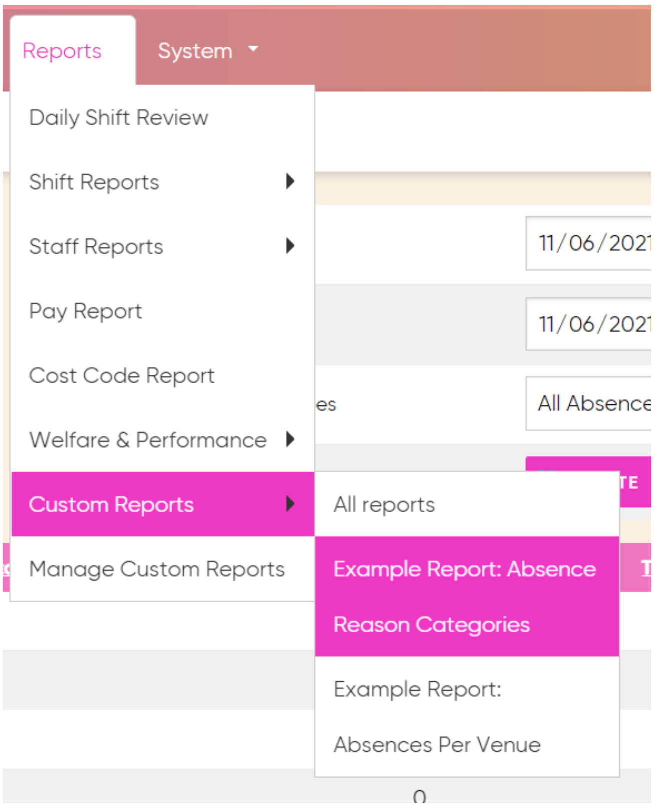
2.4. Custom Reports Access

The custom reports are extremely powerful tools however until now they were only available in bulk. So staff members could be provided with access to all reports or now.

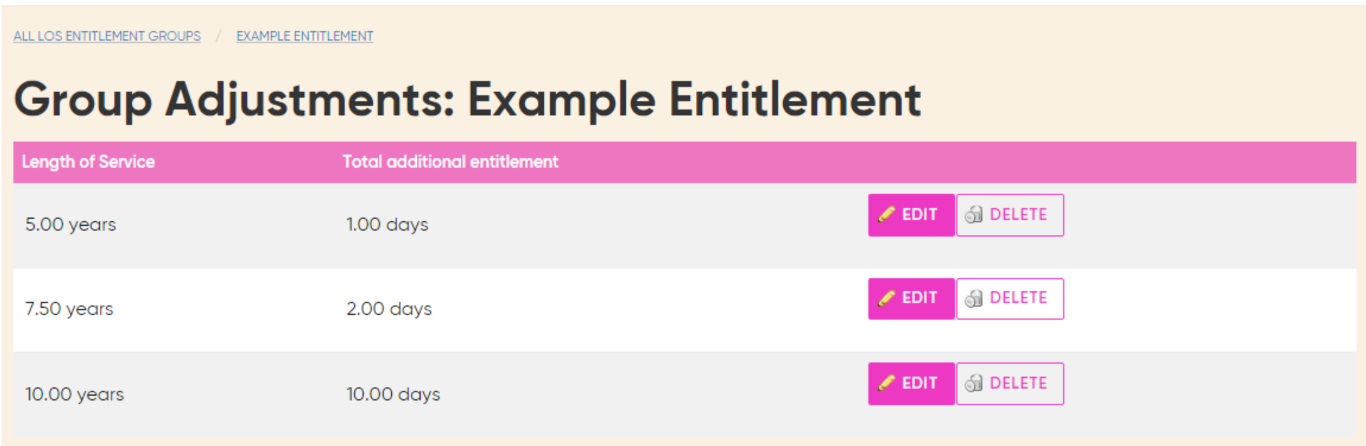
This has now been updated so you can provide access to specific reports to certain access levels including line manager access.

In addition, you can now mark the reports so they are shown in the main menu for quick access by yourself and others with access.

To edit the permissions and to display the report in the menu, Edit the report under the Manage Custom Reports menu.



2.5. Length of Service Holiday/Vacation



Length of service adjustments allow you to automatically grant additional hours or days of holiday/vacation entitlement to staff based on their length of service.

It will automatically adjust each year as the staff member's length of service increases.

The length of service adjustments are created using groups; this allows you to have multiple automatic length of service policies operating at the same time. Each contract can be assigned a different group if required.

To set this up, add a new Length of Service group under Pay > Contracts > LoS Holiday Entitlements. Once added, add a new entitlement by specifying the years of service required and the total to add to their entitlement. Note that the system will calculate their adjustment based on the length of service at the start of the holiday entitlement year.

Once you have all of the different entitlements added, you can assign this to a contract. Edit a contract and select the correct length of service entitlement group under the Holiday tab.

Note: this will be in addition to any manual adjustments you have added to a staff member's account. If you have Length of Service adjustments already then please discuss this with our support team who can help you migrate to this new feature.

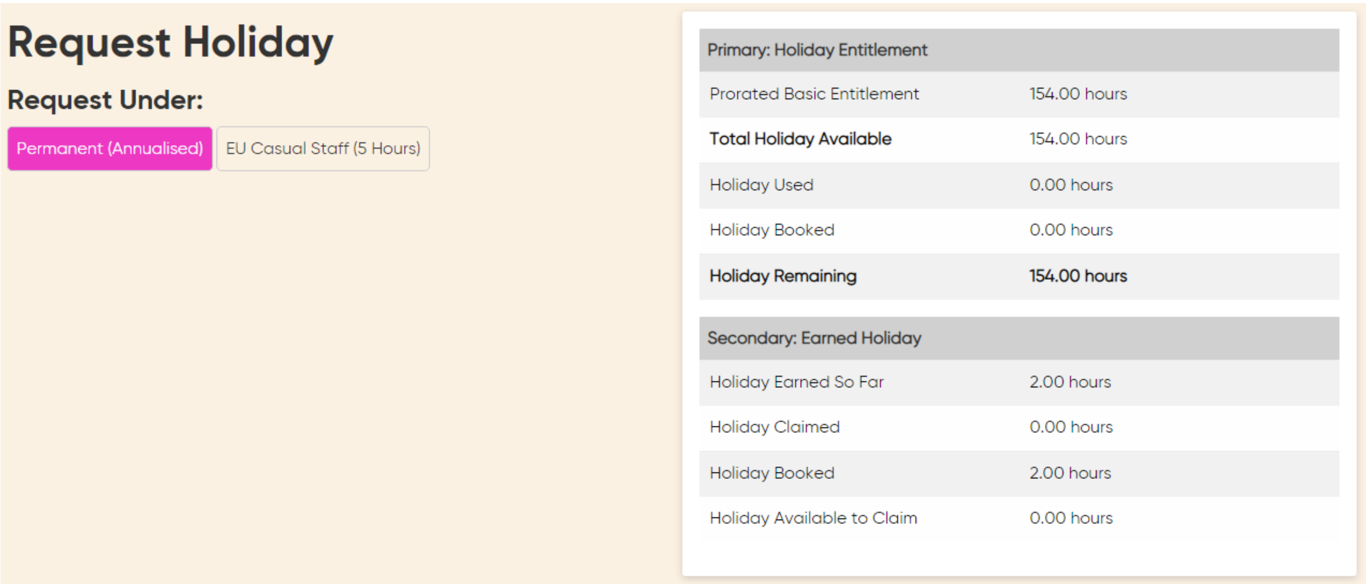
2.6. Multiple Contracts Holiday/Vacation

Previously the system would only allow holiday/vacations to be booked against the primary contract within an account.

This update allows multiple holiday/vacation entitlements to be tracked and claimed against. This means that staff can now earn additional holiday under a secondary contract and claim these hours or days when requesting holiday/vacations.

Profile pages will now display each holiday entitlement for each of their contracts.

When requesting time off, the system will display all of the valid entitlements and allow the staff member to choose which entitlements to put the request against.



Each of the entitlements will contain a full breakdown and have the normal holiday report to be able to report and carefully manage the holiday entitlement usage.

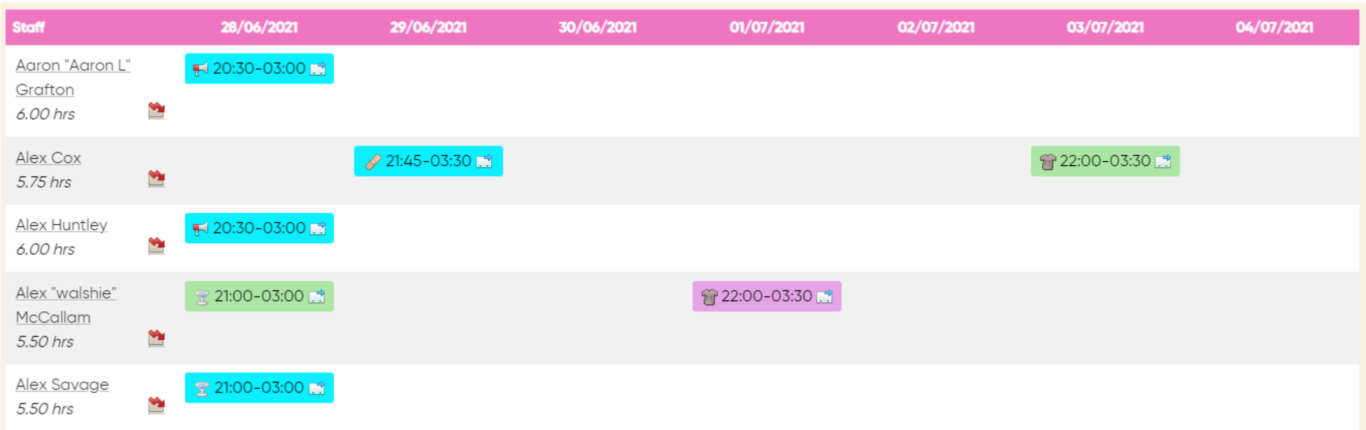
There will be no changes for staff who only have one contract or have secondary contracts where holiday is simply paid automatically.

2.7. Venue Groups on Shift Week view

We've improved the manage shifts week view when managing multiple venues. We'll now default to showing all staff across the venue group and displaying where that shift is taking place using colour coding.

You can, if required, return to a split view where each venue is shown repeated down the page. This option is in the line of view options at the top of the week view.

You can set the colour for each venue under the venue settings



2.8. Improvements to Artifax Events Integration

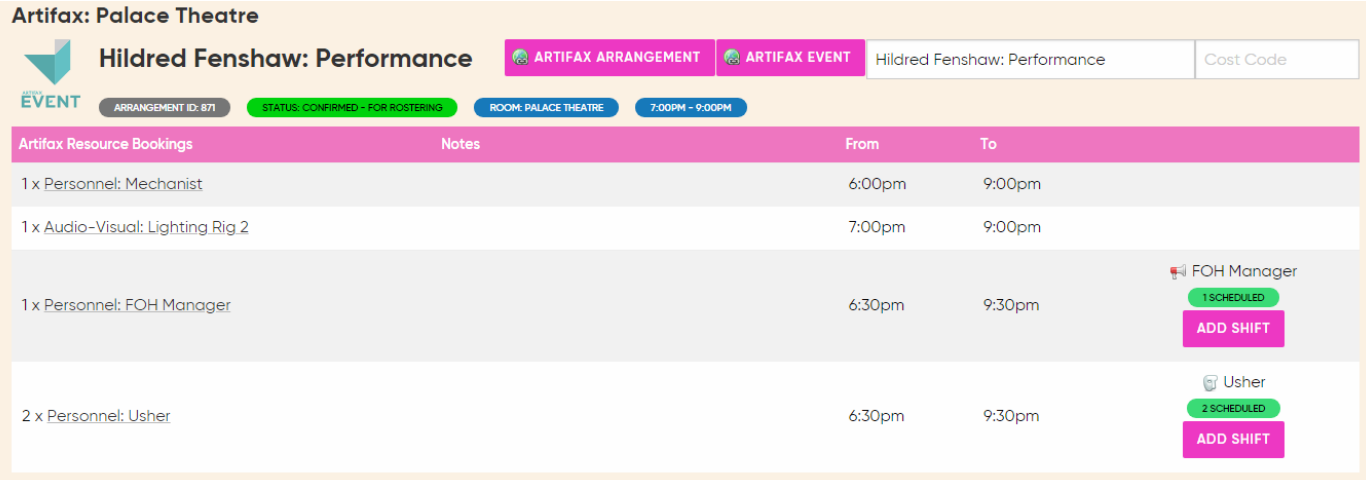
This release brings a few key updates to the Artifax integration. The first is an improved management of shifts from booked resources and the second is the ability to push the scheduled staff details back up to Artifax so this information is available directly on the event.

2.8.1. Resources View

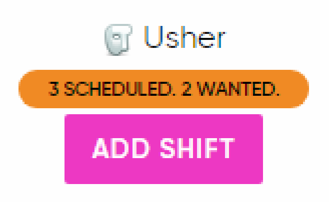
On the grid view, the system will display a comparison of the Artifax resources that are scheduled compared to the StaffSavvy shifts scheduled in. We'll show when it's matching and display a warning when StaffSavvy doesn't match the booked resources.

We've also added a quick Add button to the resources which easily adds a shift matching the resources into the system ready to be assigned to a staff member. It's perfect for quick additions or for teams that require careful manual management.

Below is how the resources panel now looks with the green schedule notifications displayed along with the Add Shift button.



If the schedule shifts are not matching the booked resources, you'll receive a notification with the difference.



2.8.2. Sync Staff Allocation Up to Artifax

Along with the newest update in Artifax Event, this StaffSavvy release allows you to push up the scheduled staff and their details back to Artifax when using Artifax resource bookings for staff.
This means their names and, optionally, total working length and/or costs are displayed right on the resource bookings within Artifax Event.

To enable this, go to the Integration tab of the Global Settings. Find the option called "Upload Resource Allocations to Artifax?" and choose which Artifax Custom Field we should write the allocation of shifts to. You can also choose here the order that staff should be listed (if there are multiple staff allocated) and what information we write to Artifax such as working duration and budget cost.

Please note that you need the latest version of Artifax for this feature and that updates to the scheduled shifts can take a few hours to sync through between the systems.

StaffSavvy

2.9. New Report: View a week of availability

We've added a new report of availability after several requests. This report displays a week breakdown of staff availability for each day using the staff who can work at a venue and have a specific role.

The report can take a few minutes to generate due to the complexity of the information. The report will show traffic light of availability:

- Not available
- Asked not to work or a restriction that could be over-ridden by a manager
- Available

This report is available under Reports > Staff Reports > Week Availability Report