



**User Guide:
New Features & Changes
in v2021.2.1**

1. New Features

This is a small update to bring a series of improvements along with critical updates to work eligibility checks in the UK.

The improvements include several of the most requested updates along with behind-the-scenes support for many more custom reports and exports.

1.1. Changes to Current Version & Recommended Actions

There are two 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:

- **Contract Exception Dates have changed to Date Sets**

We're renamed contract exception dates to better reflect their various uses as both ways to exempt rules but also now display warnings or block holiday requests.

Recommended Actions:

- Update any internal documents referring to Contract Exception Dates.

- **Shift Assets renamed Assets**

We're renamed Shift Assets to simply Assets as they can now be used outside of shifts.

Recommended Actions:

- Update any internal documents referring to Shift Assets

1.2. Headline New Features

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

- **Automatically block holiday/time off requests during certain periods**

Using the renamed Contract Date Sets, you can either display warnings or completely block holiday and time off requests.

To use: create a date set to cover the range of dates needed. A set can have multiple dates within it and can have dates added anytime. Find these under Pay > Contracts > Contract Date Sets.

Once your date set is available, under a contract, go to the Holiday tab. Choose your date set for either the warning or the block options on this page. You can have different date sets for both warnings and blocks.

- **Assets outside of shifts**

You can now use Assets as a longer-term asset assignment. For example, laptops, portable devices etc.

To use: Simply create a new Shift Asset and set it to be a long-term assignment asset.

Once created, under a staff member's account you can access an Asset page. Here you can assign and return assets for that staff member.

- **Data Retention Policies on data sets and documents**

To better support your data retention policies, you can now set automatic data removal on both document types and data fields. This will instruct the system to delete the data in line with your policy for that item automatically.

To use: On data sets, simply edit the data set under System > HR > Manage Staff Data Sets and set your preferred data retention policy based on when the account is archived.

On document types, simply edit the document type under System > HR > Manage Document Types. In the data policy section, choose your preferred data retention period once the account has been archived.

- **Display Leadership Team for a shift**

A common request has been to highlight who is a staff member's shift leader or manager within a shift. Previously, this was simply displayed as the roles for staff within a shift. Now you are able to choose the roles you wish to highlight as a leadership role.

These leadership roles can be displayed either just within the venue of the shift (so only if the staff members are working in the same venue) or you can now display leadership staff across all venues within the primary venue group. This allows the leadership team to be displayed on shift details pages even if they are working in a different venue.

To use: Edit the role under Staff > Staff Settings > Staff Roles. Under the Visibility to other section, change the Colleagues drop down to set them as a leader within the venue or primary venue group.

Primary Venue Groups; venues can be in an unlimited number of venue groups. You can set a single primary venue group for each venue too. You can do this under the Assign Venues page (System > Venues > Venue Groups. Choose the primary venue group and click Assign Venues). Check the box to assign the group as the venue's primary group.

- **Off-site Time Entries**

To aid reporting, contact tracing and lone worker notifications, time entries can be marked as off-site. This

allows staff to clock in remotely and be recorded as being off-site or on-site. This option is available when clocking in remotely to all staff.

To use: Available automatically using remote clock in screen

- **sFTP Upload for Wage Sheet Data**

Within this update, you can now configure an sFTP upload for your wage sheet files. This instructs the system to push wage sheet files up to your sFTP location as soon as the archive button is clicked.

To use: Under System > Configuration > Global Settings. Go to the Integrations tab and the Wage Sheet sFTP Upload section. Enable the sFTP connection and add the various required fields.

Note: Currently only the raw data export is available to be uploaded. Contact the support team to have other formats added.

1.3. Additional New Features and Improvements

- **UK Employment Eligibility Schemas Updated**

Following the introduction of new rules, the schemas and optional documents have been updated. This now allows for different document types as well as required information to be provided.

For online right to work checks, the system can now request share codes along with dates of birth from staff as part of the checks. Once provided, they will be displayed within the work eligibility console ready to have the online check conducted. Proof of the online check can then be uploaded by the manager conducting the checks.

To use: available instantly. If you wish to allow staff to upload their own documents for managers to review then please contact support straight after the update.

- **Working During Absence Types**

You can now allow staff to work during certain types of absence. This allows for warnings to be displayed but staff and managers still to schedule shifts during these periods.

To use: Enable the option when editing types of absence. System > HR Settings > Manage Absence Policies. In the top actions menu; Edit Absence Types.

- **Holiday Entitlement Rolling Permission**

You can now allocate different permissions to the ability to confirm holiday entitlement rolling between years.

To use: by default, the same access levels have been added for you. You can now remove/add access levels. The permission is called "Holiday Rolling Allowance Report"

- **Manual TOIL Request Limits**

Until now, manual TOIL requests had no automatic limits as they were approval only. Now the same limits available for automatic rolling have been applied to manual requests.

To use: Edit the contract you wish to update. Under the TOIL tab, choose your restrictions you wish to apply.

- **Covert shifts to Extra, Offered or Unassigned within the transfer window**

When transferring shifts, you previously could convert them to an Extra shift within this window. Now the other types of unassigned shifts are available too: Offered Shift and Unassigned Shift.

To use: On any of the shift management pages, click to transfer a shift and choose which type of shift to convert it to.
- **Choose what happens to Relinquished shifts on each venue**

This option allows you to change what happens to a shift when it is relinquished; does it return to either an offered or extra shift based on its origin? Or do you want to force it to be an Extra, Offered or Unassigned Shift?

To use: Under the venue settings page for the selected venue, go to the Shift Configuration tab and change the Relinquished shifts status under the Cover Shifts / Extra Shifts section.
- **Choose what happens to cover shift requests on each venue**

This option allows you to insist on manager approval for every cover request. We highly recommend against this option for continuity of your processes and ensuring you always have staff working shifts (requests can be delayed or stuck with managers until it's too late)

To use: Under the venue settings page for the selected venue, go to the Shift Configuration tab and change the Cover Request Approval under the Cover Shifts / Extra Shifts section.
- **Pay Elements; view exactly which roles or staff are using each pay element**

This is just an update to the Pay Elements screen so you can now easily trace which pay elements are being used within which roles or directly assigned to a staff member.

To use: on the Pay Elements page, you will now see links to view where the pay elements are being used. The links will take you to other screens which will filter automatically based on the pay element chosen.
- **Support Code**

We've added a support code that is visible under each person's profile to that staff member only. This allows us to validate the person we're speaking to via phone or email is the person who owns that account.
- **Many smaller fixes and micro improvements to the system**

1.4. Features removed in this release:

- None

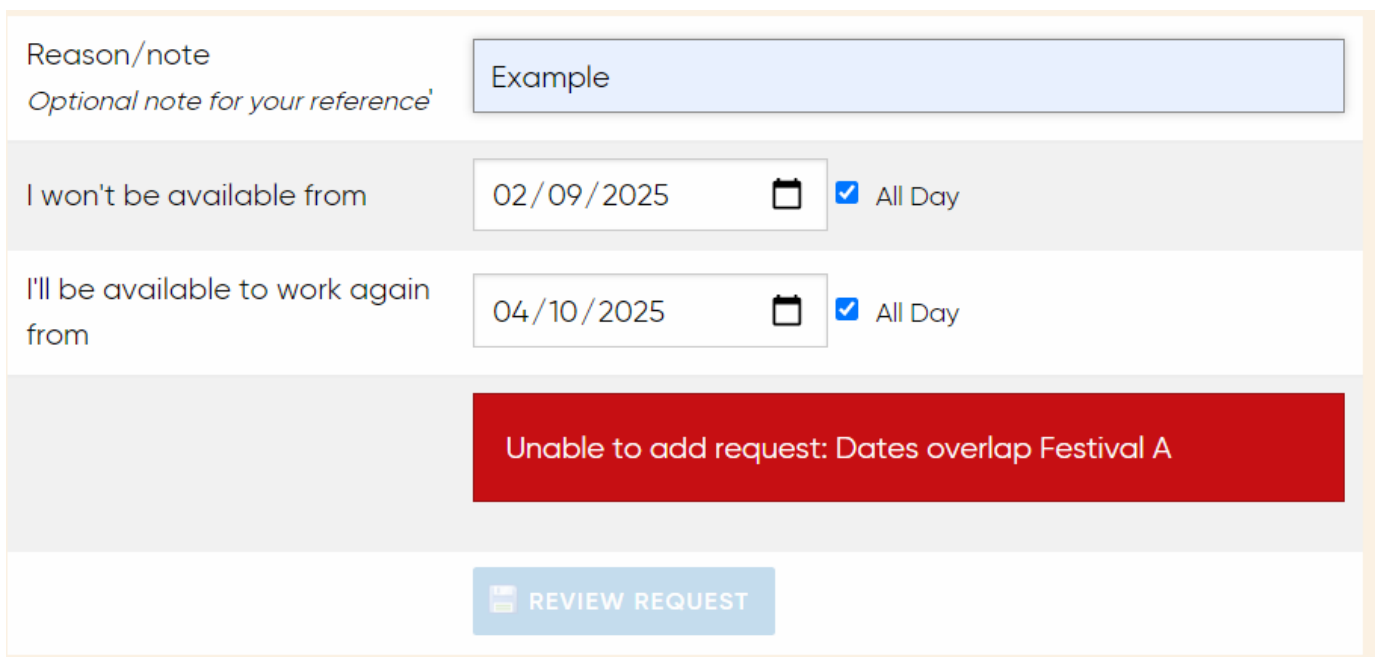
As always, please get in touch if you have any questions or suggestions. Email us at support@staffsavvy.com

2. In Detail...

2.1. Automatically block holiday/time off requests during certain periods

This new option allows you to display warning messages to staff when they are requesting holiday or time off that cover certain periods of time.

You can also use the same option to block all requests during the dates provided. This is the ultimate option and no requests will be permitted during these dates.



The screenshot shows a form with the following fields and elements:

- Reason/note:** A text input field containing "Example". Below it is the text "Optional note for your reference".
- I won't be available from:** A date input field containing "02/09/2025", a calendar icon, and a checked checkbox labeled "All Day".
- I'll be available to work again from:** A date input field containing "04/10/2025", a calendar icon, and a checked checkbox labeled "All Day".
- Error Message:** A red banner with the text "Unable to add request: Dates overlap Festival A".
- Action:** A blue button labeled "REVIEW REQUEST".

To setup a date set (which can be used to either block or display warnings) go to Pay > Contracts > Date Sets.

Create a new date set or update an existing set. Simply add all of the date ranges you wish to exclude. If it's a single date, then set the start and end dates the same.

Contract Date Sets

Set Title:

Dates
Any shifts which are wholly within one of the date periods below will be except from hard limits on hours

Reason	Start	End (inclusive)	
<input type="text" value="Festival A"/>	<input type="text" value="01/01/2025"/>	<input type="text" value="12/12/2025"/>	DELETE
<input type="text" value="Festival B"/>	<input type="text" value="02/09/2026"/>	<input type="text" value="02/10/2026"/>	DELETE

ADD DATES

SAVE GROUP

Now, to assign the date sets to a contract. Go to Pay > Contracts > Manage Contracts. Edit your contract. Under the Holiday tab, find the Warnings and Request Blocking section.

You can choose different date sets for displaying warnings and blocking requests.

Warnings and Request Blocking

Warning Dates
Show a warning message when requesting dates within this date set. Create / Edit the dates using Contract Date Sets

Block Request Dates
Prevent requesting dates within this date set. Create / Edit the dates using Contract Date Sets

SAVE CONTRACT

2.2. Assets outside of shifts

Assets can now be assigned as long-term loans rather than just when working a shift. This allows items such as laptops and mobile devices to be tracked.

Create a new asset with the option of Assigned long-term to staff chosen.

You can then access the asset assigning screen under the Actions menu of the staff member’s profile.

From there, you can assign any number of the long-term assets as well as return currently assigned assets.

Asset Assigning and Return

James Hodgetts

[Current Assets](#) [Assign New Asset](#)

Asset	Reference	Assigned	
Laptop	#45645464df	11:07am 02/09/2021 by James Hodgetts	RETURN ASSET

Both long term and shift-based assets will appear within the asset log for that staff member.

2.3. Display Leadership Team for a shift

Leadership for this shift

Duty Managers Bar



Aaron
Grafton
8:30pm -
3:00am



Elanor
Savva
8:30pm -
3:00am



Natalie
Serghides
8:30pm -
4:00am

Colleagues for this shift

Bar Crew

You can now split the colleagues section on the shift details page to show different roles as the leadership role for that shift.

In addition, you can now display leadership staff from any of the venues within the same primary venue group. This allows staff who might be assigned to a different venue to still be shown on the shift details page as either colleagues or as leadership for the shift.

Under Staff > Staff Settings > Staff Roles, edit the role you wish to display. Under the General Settings tab, change the Colleagues section to change how and when those shifts are displayed.

Visibility to others

Private?

This makes the role completely hidden from any searches or profile pages. It's designed to be used only when you have a role that no one else should know about.

Staff can see members of this role

Colleagues

This sets if staff who are working at the same time can see staff within the venue or venue group (part of the lead

Staff can see members of this role when working at the same venue

Staff can see members of this role when working at the same venue

Staff can see members of this role when working within the same primary venue group

Show as Leadership: Staff can see members of this role when working at the same venue and they are shown as leadership for the shift

Styling

Show as Leadership: Staff can see members of this role when working within the same primary venue group and they are shown as leadership for the shift