



User Guide: New Features & Changes in v2022.1.0

1. New Features

This is a long-awaited update to StaffSavvy bringing a brand new powerful add-on, Distance and Travel Time. This exciting add-on is designed for organisations working across physical locations. The add-on calculated physical distances between venues and staff base locations along with expected travel times. This allows the system to predict travel times when scheduling shifts for the same staff member across locations as well as automatically feeding into the expenses tool providing automatic mileage expenses.

Excitingly, our expenses add-on is now included in our core feature set too! Expenses are now free to use for all standard edition organisations and you can enable this under your features tab of Global Settings.

In addition to these exciting new tools, we have a vast array of improvements and new options across the core software. From new integrations to improved shift management, powerful cost code management to 13 new trigger events, amazing new contract manipulation rules and even the option for staff to “confirm” time entries before payment.

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:

- **Updated personal details report & onboarding**

Based on feedback, the updated personal details report will no longer include staff who haven't completed their onboarding yet. This allows you to ensure they have provided all details before exploring them to your payroll or external system.

Recommended Actions:

- Update processes to align to this new restriction

- **Regular Repeating Shift changes and holiday**

Repeating patterns of shifts would often cause problems with pre-booked holiday if the shift pattern was updated. This update will correctly adjust booked holiday so it matches the new shift pattern even if the holiday was pre-approved.

Recommended Actions:

- Update processes to be aware of this change.

- **Contract Manipulation Rules Affecting Part Of a Time Entry**

We've resolved several issues around these rules where the rule crosses a physical day (e.g. over midnight) and the shift does not. In addition, the rules now apply changes to pay and roles on a partial match of the shift which will change the behaviour in a very small number of situations.

Recommended Actions:

- Update the rules to ensure the partial application of pay element or role changes is correct.
- Audit several time entries post update to ensure that the rules are being applied as you expect.

1.2. Headline New Features

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

- **Distance and Travel Time Add-on**

This is a major new set of features which provides detailed travel time and distance information for staff between their base locations and venues. When enabled, the system can be set to limit travel times, prioritise staff based on travel times and even automatically add mileage expense claims based on the required travel distance.

To use: Enable the new time and distance add-on within the Features tab of Global Settings. Add the locations of each venue under the Edit Venue page > Location tab (this is only shown when the time and distance add-on is enabled).

Turn on the Base Location data field set under System > HR Settings > Staff Data Sets. Configure the access rights to the data set to ensure only those who should see the address can do so.

Under each employee profile, you (and they) can now set their base location.

- **myInterview integration**

myInterview is a third party service which provides video interview technology where applicants can record their responses to questions you pose using their cameras. You can then review their videos directly within the applicant process in StaffSavvy

myInterview subscription required.

To use: Enable the myInterview integration within the Global Settings page and provide your Widget key and API Secret. Once enabled, you can enable video interviews per position and configure the questions you wish to ask within the video interview.

Within applications, you can invite the applicants to provide a video interview in the same way as a traditional StaffSavvy interview. Once provided, this will update their status in the applicant's list.

- **Cost Code Management**

This update brings powerful new cost code management into the system. You can now configure a predetermined list of cost codes which makes it much easier and less error-prone to manage complex codes. In addition, this option allows for a label to be set along with a different physical code used for reporting.

Shifts and time entries can now have cost codes configured directly on them at any time and you can allow staff to set their own cost codes when clocking in or during their shift.

Cost codes are also now able to be displayed on unprocessed pay and printable time sheets.

To use: choose if cost codes are entered as free-text or from a list under the Cost Code configuration settings in global settings. To setup or import the available cost codes, use the Manage Cost Codes under System > Configuration > Manage Cost Codes.

Set which roles can manage their own cost codes on time entries under the Pay tab of the role.

- **Bulk Import of Documents**

This new option allows you to upload a zip archive of multiple documents to a staff member's account. Each document will be checked and added into their document store.

To use: On a profile page, choose View All documents under the actions menu. At the top of their documents use the Import Documents option.

This import page will keep you updated with the import progress.

- **New Time Entries Listings report**

This new report mirrors the shift listings report that has been a staple of the system for many years. The report allows you to view time entries in different formats across multiple venues and date ranges. It's useful to be able to view, export or print time entries.

To use: Find this report under Reports > Time Entries and Pay > Time Entry Listings

- **Bulk assign Extra, Offered and Unassigned shifts**

A great new feature to the assign shifts popup, this will automatically highlight if you have multiple shifts with the same details that are not yet assigned to staff. This allows you to choose multiple staff within the popup to assign the shifts to; providing a much quick and more efficient process. The popup will automatically indicate to you when you've selected enough staff for the available shifts. All staff will be updated and informed as normal.

To use: Simply use the assign shift popup for any extra, offered or unassigned shifts. The popup will highlight if you have multiple shifts and how many staff you can select.

- **Time Entry Confirmation by Staff**

This contract option requires staff to confirm each time entry before it will be included in a wage sheet. Managers still review and approve time entries at which point staff will receive notifications on their dashboards that there are time entries to confirm. They can then review and confirm each one. Only confirmed time entries will be processed into wage sheets.

To use: Enable the Time Entry confirmation option under the Shifts & Time entries tab when editing a Contract.

- **Artifax Event: Automatic notifications on Manage Shifts when scheduled shifts do not match booked resources**

This update includes more intelligent tracking of Artifax Resources vs Shifts in Staffsavvy. It allows for the system to compare the currently planned shifts to the required resources. If they do not match then the system will display a warning icon on the Mange Shifts page. You can then view the details page to see what doesn't match. At this point, you can correct the shifts so they match or dismiss the warning. The warning will only reappear if the requirements change again in the future.

To use: enabled by default

1.3. Additional New Features and Improvements

- **Time Warp**

This great new option is available on the grid view and schedule creation templates. It allows for the shifts (or template rows) to be moved forward or pushed back by a certain amount of time.

For example, on the grid view, you might need to bring the whole schedule forward 30 minutes due to a change in the show times. Using the time warp option will allow you to move them all in one go.

To use: on the shift grid view or manage template view, choose the shifts to move. At the bottom of the list of shifts, choose the Time Warp drop down and choose to either move them forward or push them back. Click the change button to confirm.

- **Week View: Extra, Offered & Unassigned**

The week view can now have the extra, offered or unassigned rows always displayed at the top of the page. This allows you to very quickly add additional unassigned shifts on the week view. This will make it much quicker to increase the team size at short notice.

To use: On the Week view go to Settings in the actions menu > Always Show > and choose the types of unassigned shifts to display. You can turn them on and off using this menu.

- **Check In Forms On Clock Out**

You can now ask staff to complete a check-in form when they finish a shift. This allows you to readily accept feedback on working from staff as they finish.

To use: on a venue's settings, use the clock out Check In on Clock Out setting within the Check in section of the Clock In Configuration tab.

- **13 New Trigger Events**

These brand new trigger events add a load more options to your automation! We have new daily, weekly or monthly tasks along with birthday or data field date alerts.

We've also improved the reporting for several of the events to provide us with more detail on what happens and when.

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"

- **Trigger Email to External Address**

This option allows you to send an email to any combination of email addresses. Previously, they had to have an account in the system. This option allows you to list the addresses to send the email to.

To use: On your event trigger, add a new action and choose the external email address option. Make sure you provide the email addresses correctly and ensure the email doesn't include private data.

- **Absence Calendar Feed**

The calendar absence feed allows you to have any external calendar linked to the absences (and holiday) within the system. This works in the same way as the existing calendar feed.

To use: Click on the Calendar Feed link within the Absence Calendar report under Reports > Staff Reports > Absence Calendar

- **Manually Edit Contract Document Before Signature**

Previously contract documents were simply mail-merged with staff member details based on their contract and data fields. This update allows for the documents to be manually edited before signature.

To use: Click the Edit Contract Document when previewing the unsigned contract document on a staff member's account via their profile, Edit Details > Manage Contracts.

You can also enable an approval step under the Global Settings > Configuration > Contracts section. This will require a contract document to be approved before a staff member signs it. It allows you to then

assign a contract and review, edit and approve the contract document before the staff member can see it.

- **Recruitment Add-on: Store a copy of application form on the successful applicant's account**

Automatically keep a copy of a new staff member's application form within their documents. Choose either to have the whole form or just the questions that can be seen during the shortlisting process (to hide private data)

To use: Create a new document type to upload the application forms against. Do this under Settings > HR Settings > Staff Document Types. It must be an Upload type.

Once created, go to the position and edit the details. Under the Successful Applicants tab, choose the option at the top as to which version of the application form to save and choose your newly created document type.

- **Recruitment Add-on: Store a copy of the offer letter on the successful applicant's account**

Automatically keep a copy of a new staff member's offer text within their documents. This will create a branded document and include the offer content as provided to them to confirm via the portal.

To use: Create a new document type to upload the application forms against. Do this under Settings > HR Settings > Staff Document Types. It must be an Upload type.

Once created, go to the position and edit the details. Under the Successful Applicants tab, choose your newly created document type under the offer text box.

- **My Available Shifts: View my existing shifts alongside available shifts**

This simple option allows staff members to view their existing shifts alongside available shifts in a list. It means they can more accurately plan their days and see when they are already working alongside shifts that are available.

To use: staff can toggle existing shifts on/off on their Available Shifts page

- **Staff Events: Require acceptance before being confirmed on the event**

This option allows a manager to review and approve/reject each staff member who applies for a staff event. It allows you to then decide who can attend based on the answers provided in the optional questions or other functions

To use: Under the Staff Event, enable the approve attendees option.

- **Clock In Screens Scheduled Restart**

This option will automatically restart the remote clock in screens on a schedule. This can help reduce the chances of freezing screens on some devices.

To use: Pay > Manage Clock In Locations. Edit the location and set the restart time.

- **Contract Manipulation Rules improvements**

They can now be configured with a minimum length of service.

The rules can also now change pay elements or roles on part of a time entry only allowing for complex rules to be applied where rates of pay change automatically based on worked hours.

To use: these options are now available within the contract manipulation rules

- **Half Day Holiday/Time Off requests are now easier**

We now provide a quick "half day" button alongside the start date selectors for holiday/time off periods.

This allows staff to quickly choose just a half day deduction and the system will select the correct time to archive that deduction.

To use: available automatically for those with paid holiday/vacation entitlements

- **UK Only: Automatically set tax code based on new starter form questions**

A common request has been to automatically set tax codes based on the HMRC's starter form questions. This update adds this option via a new data set which new staff can complete in order to set the default tax code. This is particularly useful for organisations who export data to other payroll systems when these systems require tax codes to be set for the import to work; Sage Payroll for example.

To use: simply enable the field set "HMRC: New Starter".

- **Non-attendance Reasons & Suspended Pay**

Non-attendance reasons can now add time entries automatically using a suspended pay code; this allows the system to pay a shift as normal but flag that it was paid while the staff member was suspended. This can be used in combination with the suspended staff options in the global settings so that suspended staff have their shifts cancelled automatically with this non-attendance reason and their time entries automatically added with the correct code.

To use: choose the suspended pay option within the non-attendance reasons settings.

- **Shift Listings Showing Primary Venue Group Shifts**

This option adds a special permission called "Shifts Schedule Listings Report: primary venue group". This permission automatically adapts the Shift Listing report so it will show all shifts across the staff member's current venue's primary venue group.

For example, you might have a team who work in a part of a building. You do not want them to have access across all venues within the building however you wish for them to be able to view a report that shows them all the staff working in the building.

This permission can be granted and all of the venues in the building set to share the same primary venue group.

To use: set primary venue group(s) for the venues you wish to have this access.

Grant the "Shifts Schedule Listings Report: primary venue group" permission to the access levels you need.

They do not need to have access to all the venues in the the venue group; they'll see be able to see the shifts across the group but not be able to edit them or view reports.

- **Many smaller fixes and micro improvements to the system including a replacement of the photo upload tool making it easier to use on mobile devices.**

1.4. Features or tools 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. Distance and Travel Time Add-on

This is a major new set of features which provides detailed travel time and distance information for staff between their base locations and venues. When enabled, the system can be set to limit travel times, prioritise staff based on travel times and even automatically add mileage expense claims based on the required travel distance.

The travel information will be displayed against staff when it's relevant on the assign shift popup; it can also block shifts where the travel time is too long.

<input type="radio"/>	Jacques Cheers	TRAVEL TIME: 48 MINS
<input type="radio"/>	Jacques Smith	
<input type="radio"/>	Jake Bailey	TRAVEL TIME TOO LONG
<input type="radio"/>	James Nicholls	TRAVEL TIME TOO LONG
<input type="radio"/>	Jamie O'Grady	TRAVEL TIME: 7 MINS
<input type="radio"/>	Jasmin Page	TRAVEL TIME: 10 MINS

You can also automatically link this through to our (now included for free) expenses tool so that travel expenses are automatically created for shifts that have required travel.

Expense Claims

Allow members of this role to place expense claims

true

Pay Element	<input checked="" type="radio"/> Automatic Travel Expense?
	<input type="radio"/> No automatic mileage claim
<input type="checkbox"/> Entertainment Expense	
<input checked="" type="checkbox"/> Mileage Claim	<input checked="" type="radio"/> Automatically add Mileage Claim using calculated distances
<input type="checkbox"/> Travel Expense	

This add-on has an additional cost of 20% of your core account costs. This includes 1,000 distance calculations per month; this only includes new or refreshed distance calculations with calculations stored for several weeks at a time.

Additional calculates are charged at £5 per 1,000.

To use: Enable the new time and distance add-on within the Features tab of Global Settings. Add the locations of each venue under the Edit Venue page > Location tab (this is only shown when the time and distance add-on is enabled).

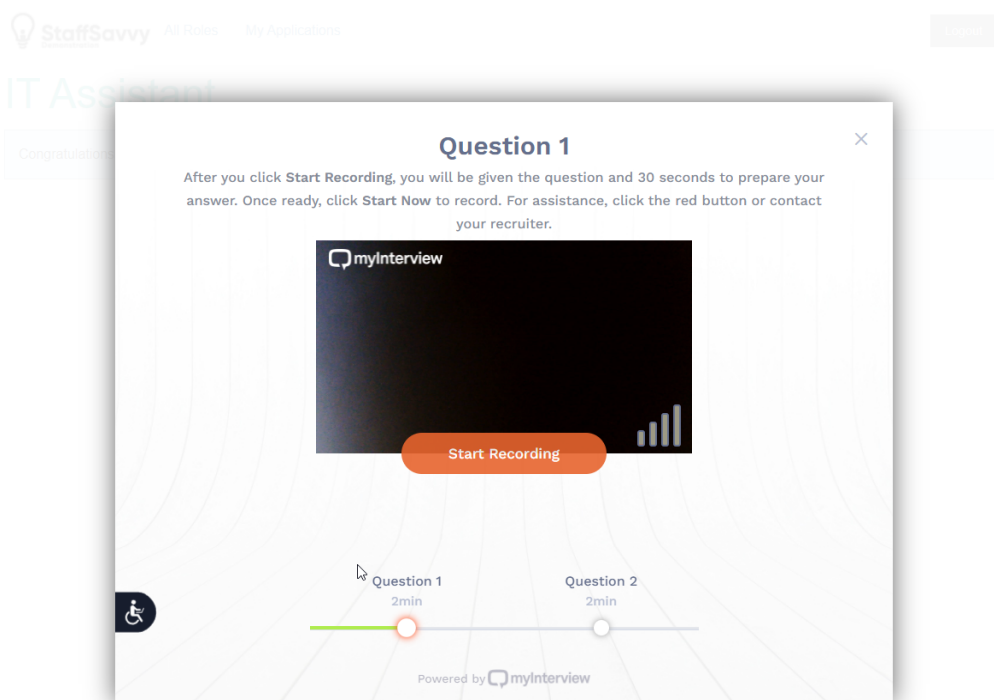
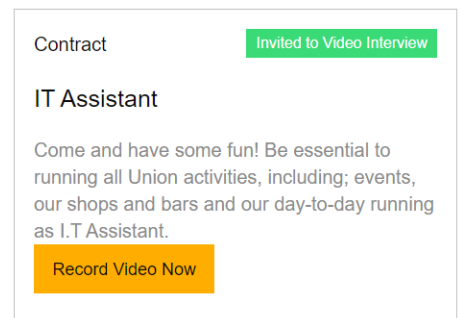
Turn on the Base Location data field set under System > HR Settings > Staff Data Sets. Configure the access rights to the data set to ensure only those who should see the address can do so.

Under each employee profile, you (and they) can now set their base location.

2.2. myInterview integration

myInterview is a third party service which provides video interview technology where applicants can record their responses to questions you pose using their cameras. You can then review their videos directly within the applicant process in StaffSavvy.

Once configured (see the to use section below), you will be able to enable video interviews per position and set the questions you wish to ask. You then invite applicants to complete a video interview in the same way as a traditional interview. They'll receive email notifications with links to complete the video via the portal.



Once complete, your hiring managers and shortlisting teams will see confirmation on the list of applicants and will be able to view the video directly within the management pages.

Traditional interviews can then be scheduled as normal.

myInterview subscription required. We have negotiated a 5% discount from myInterview for StaffSavvy users. Speak to us to receive your discount code.

To use: Enable the myInterview integration within the Global Settings page and provide your Widget key and API Secret. Once enabled, you can enable video interviews per position and configure the questions you wish to ask within the video interview.

Within applications, you can invite the applicants to provide a video interview in the same way as a traditional StaffSavvy interview. Once provided, this will update their status in the applicant's list.

2.3. Cost Code Management

This update brings powerful new cost code management into the system. You can now configure a predetermined list of cost codes which makes it much easier and less error-prone to manage complex codes. In addition, this option allows for a label to be set along with a different physical code used for reporting.

Import using CSV

Organisation Pre-defined Cost Codes

Manage: Cost Centre

Please note that adding, changing or removing dates will only affect new shifts or updates to existing shifts. Changing dates here will not automatically cancel or reinstate shifts. It will also not automatically change approved holiday deductions. Try to update this list at least a year in advance.

Code	Title (Optional)	Active From	Active Until	
<input type="text" value="49t9493djj"/>	<input type="text" value="Cost B"/>	<input checked="" type="checkbox"/> Always	<input checked="" type="checkbox"/> Forever	DELETE
<input type="text" value="sdfsdfdgf"/>	<input type="text" value="Event Type C"/>	<input checked="" type="checkbox"/> Always	<input checked="" type="checkbox"/> Forever	DELETE
<input type="text" value="39459393"/>	<input type="text" value="Cost A"/>	<input checked="" type="checkbox"/> Always	<input checked="" type="checkbox"/> Forever	DELETE

ADD A CODE

SAVE CODES

Shifts and time entries can now have cost codes configured directly on them at any time and you can allow staff to set their own cost codes when clocking in or during their shift.

Edit Shift



Millie meyer on Thu 24th February '22

Start	20:30
End	03:30
Role	Duty Managers Bar
Venue	Venue Uno
Task	No Task
Cost Centre:	- Venue/Event Cost Centre
Additional Cost Reference:	<ul style="list-style-type: none"> - Venue/Event Cost Centre Cost A Cost B Event Type C
Additional Details	

Cost codes are also now able to be displayed on unprocessed pay and printable time sheets.

Name (First, Last)	OPEN ALL/CLOSE ALL	Total Shifts/Pay Items
Aaron Grafton (Aaron L)		80
Alex Cox		103
Alex Huntley		79
Alex McCallam (walshie)		90

Date	Started	Finish	Length/Number	Unpaid Breaks	+/-	Cost Centre	Role
17/02/20 Mon	8:00PM	3:30AM	7h 30m	0 mins	+7h 30m	39459393	Bar
24/02/20 Mon	10:30PM	3:30AM	5h 0m	0 mins	+5h 0m	sdfsdfdjf	Bar
02/03/20 Mon	9:45PM	3:30AM	5h 45m	0 mins	+5h 45m		Bar

With predetermined cost codes, you can manually add them or you can use the import format. This is available using the Import link in the Actions menu on the Manage Cost Codes page. The import page provides a default format you can download to upload back into the system.

To use: choose if cost codes are entered as free-text or from a list under the Cost Code configuration settings in global settings. To setup or import the available cost codes, use the Manage Cost Codes under System > Configuration > Manage Cost Codes.

Set which roles can manage their own cost codes on time entries under the Pay tab of the role.

2.4. Bulk Import of Documents


This new option allows you to upload a zip archive of multiple documents to a staff member's account.

Each document will be checked and added into their document store. The files will all be imported as a single document type into their profile. It's a perfect tool to import historical documents.

To use: On a profile page, choose View All documents under the actions menu. At the top of their documents use the Import Documents option. This import page will keep you updated with the import progress.

Import Documents

James Hodgetts



You can use this tool to bulk import documents to an account. Simply create a zip file that contains all of the documents you want to import.

Choose the document type you wish all of these documents to be added as (tip: you might want to create a new document type called 'historical documents' or something similar so they are all in one place.)

Use the form below to upload the zip file. We'll then process the files in the background so you can continue using the system while we get everything imported and encrypted.


Document type to upload all documents as

Application Registration Card ▼

Upload Zip

Choose File

No file chosen

 **UPLOAD AND START IMPORT**

2.5. New Time Entries Listings report

This new report mirrors the shift listings report that has been a staple of the system for many years. The report allows you to view time entries in different formats across multiple venues and date ranges.

It's useful to be able to view, export or print time entries. You can use the Quick Reports on the left to choose common combinations or build your own bespoke report on the right.

To use: Find this report under Reports > Time Entries and Pay > Time Entry Listings

Time Entry Listings

Quick Reports

All time entries this week	VIEW REPORT
All time entries last week	VIEW REPORT
Last 24 hours	VIEW REPORT
Previous two weeks	VIEW REPORT
Previous 30 days	VIEW REPORT

Bespoke Report

Report Period

Select Period: Previous 24 Hours

Report Roles

- Bar Crew
- Bar Training
- Cloakroom
- DM Training

2.6. Bulk Assign Extra, Offered and Unassigned shifts

A great new feature to the assign shifts popup, this will automatically highlight if you have multiple shifts with the same details that are not yet assigned to staff. This allows you to choose multiple staff within the popup to assign the shifts to; providing a much quick and more efficient process. The popup will automatically indicate to you when you've selected enough staff for the available shifts. All staff will be updated and informed as normal.

Transfer Shift

The list below shows everyone who can work bar crew shifts and shows if they are able to work.

You can choose up to 2 staff to work the unassigned shifts with the same details.

<input type="checkbox"/>	Aaron Grafton	ALREADY WORKING	<input checked="" type="checkbox"/>	Jacques Cheers
<input type="checkbox"/>	Adam Kelly	MISSING EMPLOYMENT ELIGIBILITY	<input checked="" type="checkbox"/>	Jacques Smith
<input type="checkbox"/>	Alex Cox	ALREADY WORKING	<input type="checkbox"/>	Jake Bailey
<input type="checkbox"/>	Alex Huntley	20.00 HOURS AVAILABLE	<input type="checkbox"/>	James Nicholls
<input type="checkbox"/>	Alex McCallam	20.00 HOURS AVAILABLE	<input type="checkbox"/>	Jamie O'Grady
<input type="checkbox"/>	Alex Savage	20.00 HOURS AVAILABLE	<input type="checkbox"/>	Jasmin Page

To use: Simply use the assign shift popup for any extra, offered or unassigned shifts. The popup will highlight if you have multiple shifts and how many staff you can select.

2.7. Time Entry Confirmation by Staff

This contract option requires staff to confirm each time entry before it will be included in a wage sheet.

Managers still review and approve time entries at which point staff will receive notifications on their dashboards that there are time entries to confirm.

They can then review and confirm each one. Only confirmed time entries will be processed into wage sheets.

Time Entry & Pay Item Confirmation				CONFIRM ALL
Date	Approved Times	Paid Minutes	Approve	
10/12/2020	8:06pm - 10:06pm	2h 0m	CONFIRM	QUERY WITH APPROVER
12/07/2021	8:30pm - 3:00am	6h 30m	CONFIRM	QUERY WITH APPROVER

If the time entries are edited once confirmed by the staff member then their status resets and they will need to be confirmed again.

To use: Enable the Time Entry confirmation option under the Shifts & Time entries tab when editing a Contract.

2.8. Artifax Event Improvements

This update includes more intelligent tracking of Artifax Resources vs Shifts in Staffsavvy.

It allows for the system to compare the currently planned shifts to the required resources.

If they do not match then the system will display a warning icon on the Mange Shifts page. You can then view the details page to see what doesn't match.

At this point, you can correct the shifts so they match or dismiss the warning. The warning will only reappear if the requirements change again in the future.

