User Guide:
New Features & Changes
in v2022.3.0

1. New Features

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:

- **On-boarding Steps are being replaced by Step Lists**
  The release brings the first version of our open API. This is designed for teams who wish to pull and push data automatically between systems.
  Recommended Actions:
  - Review your new Step Lists under System > HR Settings > Step Lists.
  - Update your contract types to choose different Step Lists or to disable step lists completely.
    Pay > Contracts > Manage Contracts. At the top, choose Manage Contract Types. Edit the type and change the on-boarding step list. You can also choose to disable onboarding completely.

- **Menu Improvements**
  This release includes changes in the management menu. In particular the HR Settings menu has been split into different sections and items from other menus moved here to make it easier to find configuration options.
  The training menu has also been refined so it's easier to use.
  There are no changes to the majority of user's experiences.
  Recommended Actions:
  - Review the new menu structions and update any internal documentation to match the new structure.
  - Be aware that our documentation and videos will be updated but these may retain references to the old menu structure for a few weeks.

- **Requiring an active contract now applies to time entries as well as shifts**
  Previously you could choose to block shifts if the staff member did not have an active contract within the system. However, time entries would always be allowed. This has been changed so the option also applies to time entries too.
  Recommended Actions:
  - Ensure any staff member who is not assigned shifts but has time sheets has an active contract assigned. Alternatively disable the "Contract Requirement" setting in Global Settings > Configuration tab.

1.2. Headline New Features

Below is a brief introduction to the Headline New Features in this update. The guide goes further into more details about these features later in this document.

- **Open API**
  The release brings the first version of our open API. This is designed for teams who wish to pull and push data automatically between systems.

  To use: The API connection requires a user to have access to your system and have permissions configured to make use of the API. This can be enabled on a personal account or you can create an account purely for use with the API.
  Full API Documentation can be found here: api.staffsavvy.com

- **Multiple Squads (Teams)**
  In the new update you can now be assigned to multiple squads (often renamed teams) at once allowing for more flexibility in assigning staff. Additionally, you can also now define who is a team leader per team.

  To use: To manage and assign teams go to Staff > Staff Settings > Staff Teams.

- **Step Lists (Replaces on-boarding steps)**
  Step Lists replace the single on-boarding list. These new tools allow you to create multiple on-boarding lists for different contract types.

  To use: To manage Step List go to System > Staff Data and Processes > Manage Step Lists (on-boarding).

- **Date Field Sets can now be enabled per access level or contract type**
  This allows staff member's profiles to be adapted based on a staff member's access level and/or the type of contract they have assigned to them. This means volunteers might have less data collected than permanent staff for example.

  To use: System > Staff Data and Processes > Data Sets and Fields > Edit Set Details.
  Use the Applicable for Staff section to select which access levels and contract types this data set will be available for.

- **Custom Reports with weekly, monthly or yearly data**
  This update allows more comprehensive aggregate reports for staff, roles and venues. This allows you to view data such as paid hours each week for any period. The report will repeat the selected columns so you can see information such as "Paid Hours in Week 1", "Paid Hours in Week 2", etc.

  To use: Go to Reports > Manage Custom Reports. Create a new report and choose the option that includes "(split columns into…)". The report builder will allow you to repeat any columns that use dates such as planned hours, worked hours, absences etc.
  The completed report can have many columns so you may need to download the data for easier viewing.

- **Manual Contract Documents**
  Contract Documents can now be set to have manual countersign signatures where needed. Contracts can also now be manually set per staff member and changed from the default. You can now have different staff

member availability per contract; allowing them to specify different availability for different teams. Enabled under global settings.

To use: Go to Pay > Contracts > Contract Documents.

- **Countersigned Contract Documents**
  Contract Documents can now be set to have a manual countersign signature. Within the contract document, you can choose who should countersign the contract document. The system will notify that staff member once the new staff member has signed. They can then review and countersign the document.
  There is also a countersigned report under Reports > Staff Reports > Contract Countersign Report.

  To use: Go to Pay > Contracts > Contract Documents.

  Edit your document, enable countersignatures and add the merge tag to your document ([counter-signature]).

1.3. Additional Features and Improvements

- **Alternative Role Certificate Requirements**
  You can now specify alternative certificates for role requirements. This allows you to say a staff member must hold one of Food Hygiene Level 1, Level 2 or Level 3. Previously they would need to be together as a single certificate.

  To use: Go to Staff > Staff Setting > Staff Roles > Edit > Then under the action bar go to Requirements. Next to the initial required certificate, choose Add Alternative.

- **Wage Sheet Upload: Azure Blob Storage Now Supported**
  In addition to the SFTP push for wage sheets, we've now added the option to push the wage sheet directly to an Azure Blob Storage location. You can choose the format to be uploaded too.

  To use: System > Configuration > Global Settings > Integration.

- ***Assign Shift:* Home Staff Members Only**
  This update now allows you to only show staff who are based at the venue when manually assigning shifts. This keeps the list of available staff shorter. Managers can swap between all staff and home staff only

  To use: Go to Shifts > Manage Shifts and when you are looking at grid view and assigning staff you will see under Assigned Staff and Home Staff your Home Staff Members will come up at the top. You can alsa switch to view only Home Venue Staff at the top.

- **Weekly Availability per Contract**
  You can now allow staff to provide different availability for each of their contracts. This is useful if you have staff working in different roles and need to specify their availability per contract.

  To use: The setting applies to all staff and is under Global Settings > Configuration tab > Contracts section
  Note: Staff will need to review their availability once you make this change to ensure it is correct.

- **Alerts: Require document to be viewed**
  You can now require staff to view or download a document when reviewing an alert. Simply add the document to the alert. They will see the document on the screen or will be directed to download the

document if it can't be displayed directly. They won't be able to proceed until the document has been viewed or downloaded.

To View: Staff > Alerts > Create Alert. Add your document under Choose File.

- **New Detailed Wagesheet Export Format**
  We've added a new standardised export format to replace the Raw Export format. This Detailed Export is designed to contain all of the information you, or an external system, might need to correctly process pay.

  The format automatically includes any IDs, references or cost codes from across staff, roles, venues, pay elements and more. It includes detailed breakdown of each shift and pay item along with who authorised it and when.

  The format will automatically adjust and add columns based on the data enabled on the system. When integrating using this format, we strongly recommend using the column titles as these will remain constant but the number and order of columns may change.

  To use: Go to Pay > View Wage Sheets. Under the download option, choose Detailed Export

- **Venue Budgets; Set target staff cost percentage per day**
  With this update, you can now choose to set different target percentages per day rather than one fixed rate for every day. This is useful if you have different staff cost percentages to hit depending on external events and other factors.

  To use: Go to System > Venues > Manage Venues.

  Edit your venue you wish to change and go to the Budgets tab.

  Change the Target Origin to Percentage of Sales set Daily/Weekly.
  Use the Shifts > Shift Settings > Additional Shift/Day Data page to set your percentages.

- **On-call Shifts: Allow to overlap with other shifts**
  On-call shifts can now be allowed to be booked at the same time as other shifts. E.g. On call while also working another role.

  To use: Under the role settings, ensure the pay type is set to On-Call. There will be a new option just under the pay options that allows overlapping shifts.

- **Manipulation rules**
  In this update under Manipulation rules there are now additional filters to specify whether you want shift rules to apply to venue and venue groups.

  To use: Go to Pay > Contracts > Manipulation Rules then go under the ***Apply Rule When…*** *tab and click Apply on shifts at Venue.*

- **Work Anniversary Entitlements**
  Length of Service Additional Entitlements can now be applied on the work anniversary or the start of the next entitlement year. This means staff can receive their additional entitlement as soon as they reach their anniversary or it will be applied at the start of the next year.

To use: Pay > Contracts > LoS Holiday Entitlements. Edit the LoS group and choose the option as to when to apply the additional entitlement.

- **Publish Shifts; Set a start date range**
  Previously you could limit the publishing of shifts to everything up to a date. You can now also set a start date. This allows you to publish a fixed period of shifts early (such a Christmas or festival period) without publishing all upcoming shifts.

  To use: Shifts > Manage shifts > Under the Action Bar you can then Publish Shifts.

- **Holiday or Absences Default Actions**

  Default action on what to do with shifts when approving holiday or absences can now be configured from Global Settings. This provides you with a wider choice of options that allow specificity in how you create and manage holidays if you have certain parameters.

  To use: System > Configuration > Global Settings > Configuration.

- **Shift attendance flags set in Week View**
  You can now add or remove attendance flags on the week view. This mirrors the existing functionality within the grid day view.

  To use: Edit the shift you want to update and in the top right corner of the popup is the flag icon. Click this icon and choose the appropriate attendance flag.

- **Performance & Welfare Forms: Add Section Title and Introduction**
  You can now add title and introduction text to the forms to help separate different sections within the form.

  To Use: System > Documents and Forms > Manage Performance and Welfare Forms. Edit your performance form and add a section title but choosing that option in the answer format at the top of the questions.

- **Mange Shift Week: Shift Details**
  Popup information on each shift now includes information such as events, cost codes, linked shifts and more.

  To View: go to Shifts > Manage Shift Week. Hover over a shift to see its details.

- **Manage Shifts: Jump to today**
  Under Manage Shifts there is now a quick option to jump to today's date.

  To use: Go to Shifts > Manage Shifts, then when you are viewing an individual shift, in the actions bar you will find the option to redirect to the current day.

- **Shift Confirmation in Week View**
  You can now turn on/off the shift confirmation icon (if you are using shift confirmation/acceptance options).

  To use: On the Manage Shift Week View, use the Actions menu item Settings > Always Show > Toggle Shift Confirmed Icon.

- **Quick Shift Templates can now include roles and tasks**
  This allows you to pre-set roles and tasks onto the quick templates so they are applied immediately when creating shifts with the template.

  To use: Go to Shifts > Manage Shift Week and then in the Action Bar you can go to 'Manage Quick Shift Templates' where you have the option to create or edit Shift Templates.

- **Viewing only Home Staff**
  Transferring/assigning a shift now allows you to view just the home staff rather than all who could work.

  To use: Manage Shifts > Choose your Shift > View in Grid View > Then click the  *button to transfer/assign shift. Once you have clicked this you will have the option at the top.*

- **Block Staff Applying for in-House Positions from Viewing Applications**
  Recruitment: you can now use the Shortlister Manager page to block a staff member who would normally have access to the recruitment area from seeing a position. This allows them to apply to a position but not have access to any of the notes, comments or progress of applicants in that position.

  To use: Manage the Short listers for the position and restrict access with the option 'Access Blocked (Overrides Admin Access)'.

- **Block staff being assigned shifts during approved holiday or absence**
  Previously the only option was to display a warning to the staff member and managers. Now, you can always block shifts or just clock extra/swap shifts for staff.

  To use: Manage under the Shifts & Time Entries tab of each contract.

- **Training Certificates can now have custom expiry dates**
  You can now set custom expiry dates on training certificates so you can explicitly state when a certificate expires rather than using automatic expiry periods.

  To use: When confirming completion or editing completion dates, you can now set a custom expiry date for that certificate. This will override any default expiry settings on the certificate.

- **Auto Archiving Documents**
  Auto archiving documents and continuous employment date can be completed after weeks rather than months

  To use: Under the Global Settings > Configuration > Staff section, you can now choose weeks rather than months for automatic document expiry so staff returning a few weeks after leaving will need to complete documents again.

- **Forget Previously Offered Shifts**
  Previously, if a staff member offered to work a shift, the system would remember this so that they could present those offers to work again for similar shifts. This option will disable this option so that as soon as someone is selected for the offered shifts, the other offers from other staff are removed. They will need to offer again to work if the same shift becomes available.

  To use: Under the Venue Settings > Shift Configuration tab, scroll down to the Cover Shifts / Extra Shifts section. Change the Remember Offered Shifts option.

- **Bulk Assign Venues**
  Assign venues: you can now select a venue group to bulk assign all the venues within it to a staff member.

  To use: Go to their profile, Edit Assignments > Edit Venues. At the top of the list of venues, you can hover over Venue Groups and select a venue group to have those venues selected. Then click save.

- **Application Forms can now contain date data fields**
  This means you can now request date field information within your application form.

  To use: Simply update your application forms and choose the date data field you wish to collect.

- **Create Wage Sheet Options**
  You can now choose to select all or select none when selecting venues or contracts during the create wage sheet popup window.

  To use: When choosing the contracts and/or venues to process wage sheets for, you can now select/unselect them all in bulk using the icons next to the titles.

- **Copying Venue Configuration Includes More Options**

  Copying Venue Configuration to a Venue Group now includes ratios and quick shift templates.

  To use: System > Venues > Manage Venues. Under the more button for each venue choose Copy configuration and the new options will be in the popup.

- **Recruitment portal now allows for a social media image to be uploaded and used as the main image when sharing links**

  This allows a customised image to be uploaded which should be used on social media networks when sharing that link.

  To use: Recruitment > Settings > Portal Settings. Go to the Design tab and scroll down to the Social Media Images section.

- **Export 15 Holiday Column**
  Export 15 now includes a holiday column to separate out holiday pay from other pay.

- **Attendance Flags Display**
  Improved display of attendance flags on week view so it's clearer to see the non-attendance reasons.

1.4. Issues Resolved

- **Contract Document Expiration**
  Contract Documents will now expire immediately to allow a new agreement to be assigned. This resolves an issue where contracts could be marked as expired manually but wouldn't expire until the end of the day.
- **Various issues affecting holiday deduction calculations in specific combinations of settings**
  This could cause the system to suggest additional hours should be deducted for an absence or increase the hours expected if using the auto-correct feature.

- **Library Links corrected**
  Some library links could force a download of the library item rather than allowing them to be viewed online. This has been corrected.
- **Scoring Problems using multiple scoring rounds within the recruitment portal**
  Some users found themselves unable to lock and process completed scores for some rounds of interview scoring. This issue has been resolved.
- **Resolved several issues around check-in forms within the clock in screens**
  These issues could prevent the results of the check-in forms from being saved.
- **Over 150 individual improvements and issues resolved**
  Across many different areas of the system, we've been constantly improving the tools available to you and resolving issues. Most of these issues are extremely edge-case scenarios meaning they are highly unlikely to affect you day to day.

2. In Detail...

2.1. Open API

Our new open API brings you closer to your data with detailed access to critical information held in the system. This will be expanded in the future to provide wider and deeper access to your information.

At launch you can:

- Access, create and update account information
- Access, create and update shifts
- Access, create and update time entries
- Access, create and update absence periods
- Access roles, venues, shift tasks and pay elements
- Access shifts assigned to my account, accept/reject them (if allowed) and provide an external worker name (useful for agency integrations)

We are committed to expanding the data and options available within the API but the format will not change within version 1. The data returned will automatically be customised based on the configuration of the system; different employee references and data depending on the data fields and enabled integrations for example.

You can allow access to the API via your account (and the permissions your account has) or you can configure a dedicated API access level (that blocks direct login to the system), create an account using that access level to finely control which levels have access to which data.

There are a series of new API Permissions under the new location for permissions (System > Levels & Permissions > Manage Permissions) that can be assigned out. Once an access level has the general permission to use the API, they (or a system manger) can create API Keys for their account under their profile page.

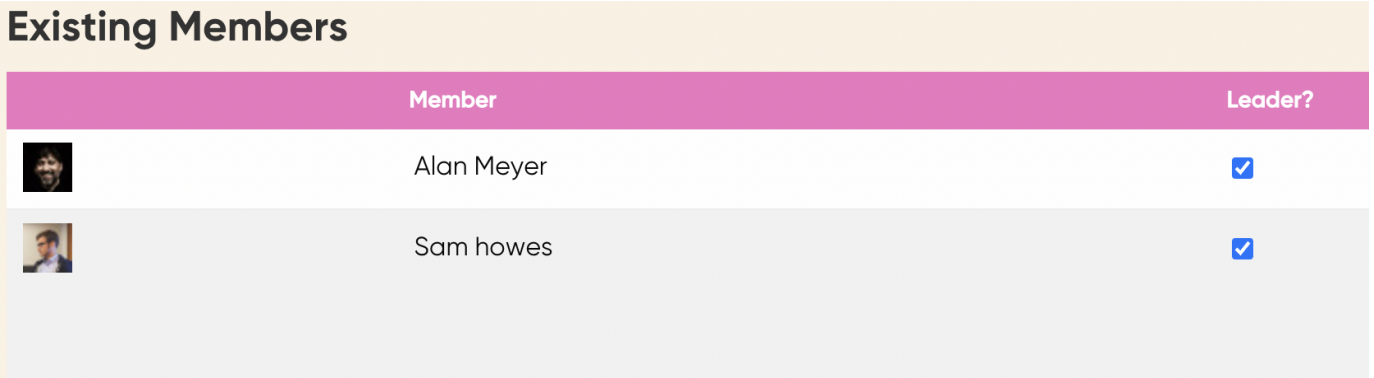
The API keys grant access to authorise the user via the API and they are then provided a temporary token to use during that session. The API keys can be rotated within a two-week window allowing for smooth rotation of keys to prevent long-term use which can be a security risk.

Our documentation will be improving over time and is currently available here:
https://app.swaggerhub.com/apis-docs/SmartBlue/StaffSavvy/1.0.0

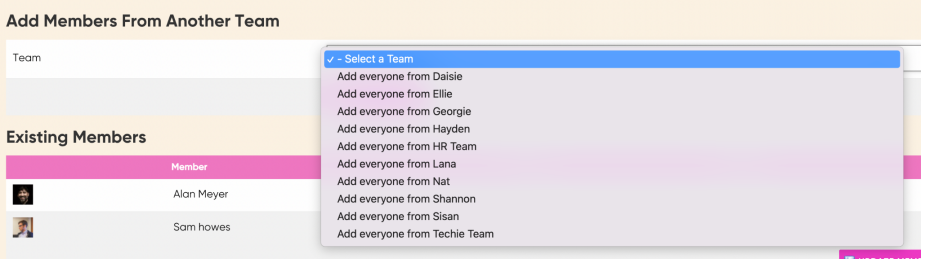
2.2. Teams

In the new update you can now be assigned to multiple teams at once allowing for more flexibility in assigning staff. Additionally, you can also now define who is a team leader per team. This will come under existing members and allow you to select who is the team leader. There is also the option to have multiple leaders within a team.

This gives staff members and those managing them flexibility if they have staff members working with different venues or for different events.



When creating a new team, you are also able to add an entire staff team into another team.

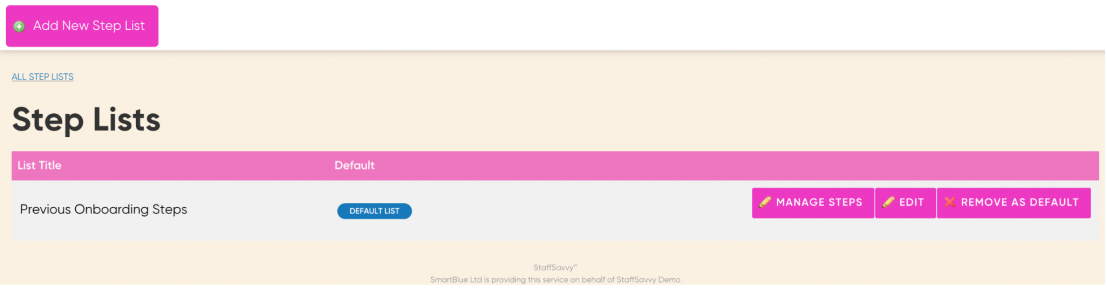


2.3. Step Lists

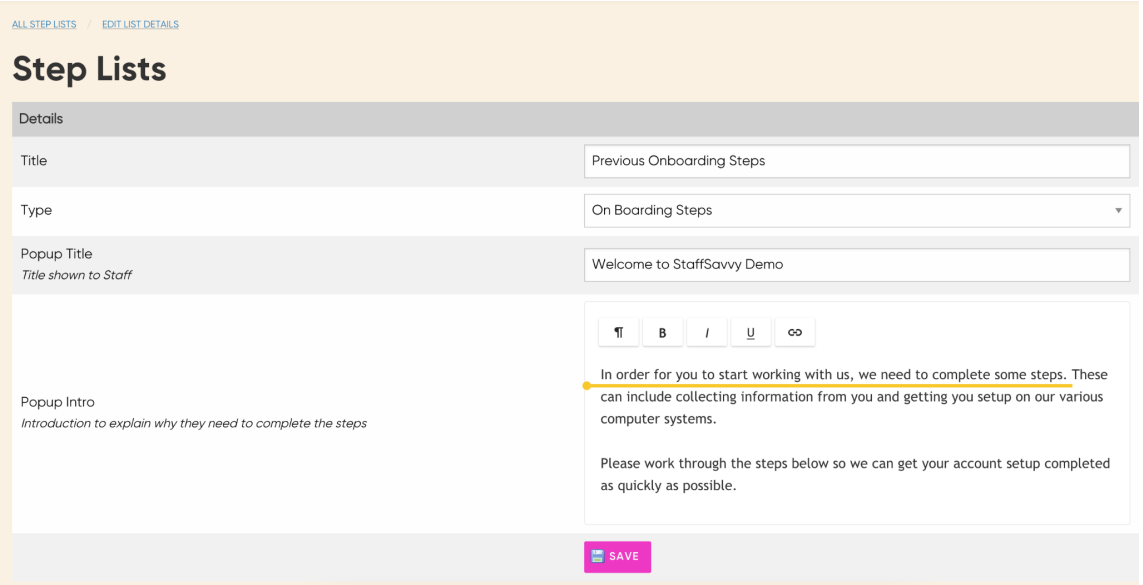
The new update introduces Step Lists, which replace the single on-boarding list. These new tools allow you to create multiple on-boarding lists for different contract types. In a future update, these lists will be expanded to offer leavers processes, job role change processes and more.

To introduce Steps Lists you need to go to System > Staff Data and Programming > Manage Step Lists.

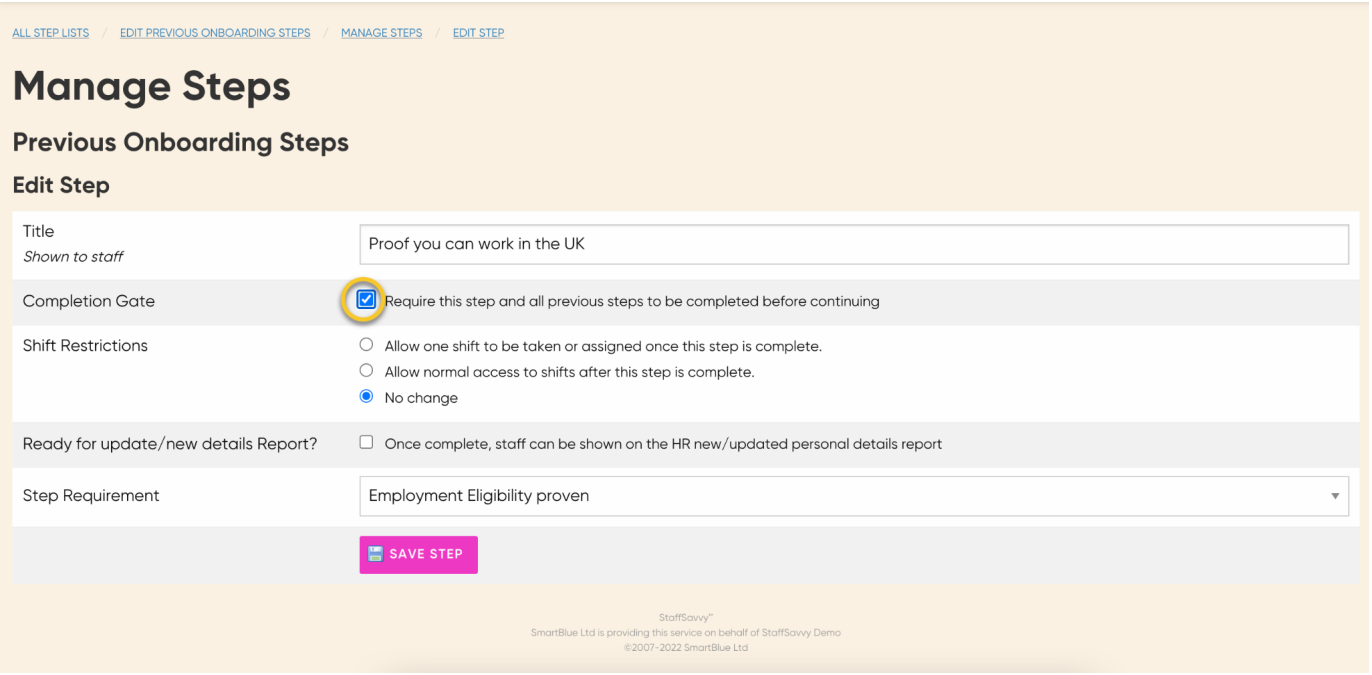
Your existing on-boarding steps have been automatically transferred to a step list called Previous Onboarding Steps.



Here you can manage the steps currently available or create a new steps list.

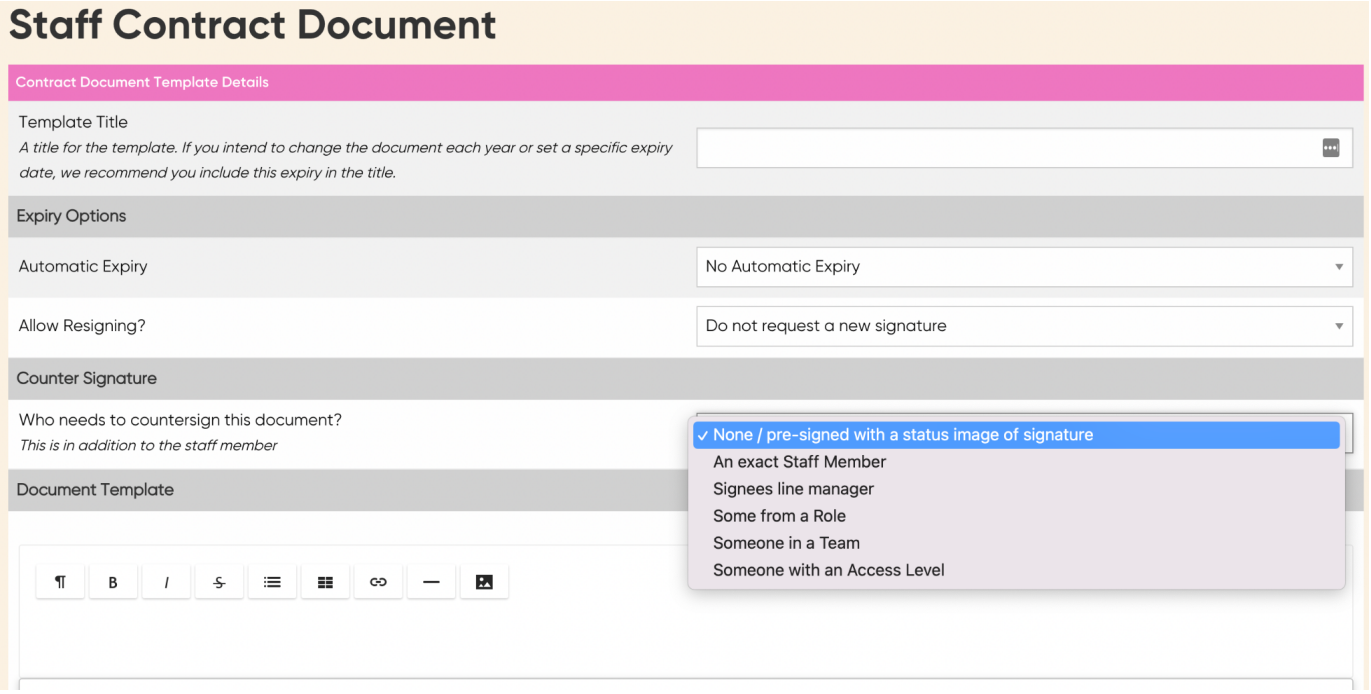


You can set up a title, type of steps and an introduction shown to staff members.



You then can create a list of steps that need to be completed. You can also specify that the list be completed in a stepwise manner. In detail, by specifying under the completion gate, that each step needs the previous step to be completed before being allowed to proceed to the next one. This means that there is a specific order that the steps must be completed in. However, it is of note that these steps can be rearranged easily using the blue arrows, as shown below.

You can now have different staff member availability per contract; allowing them to specify different availability for different teams. Enabled under global settings.

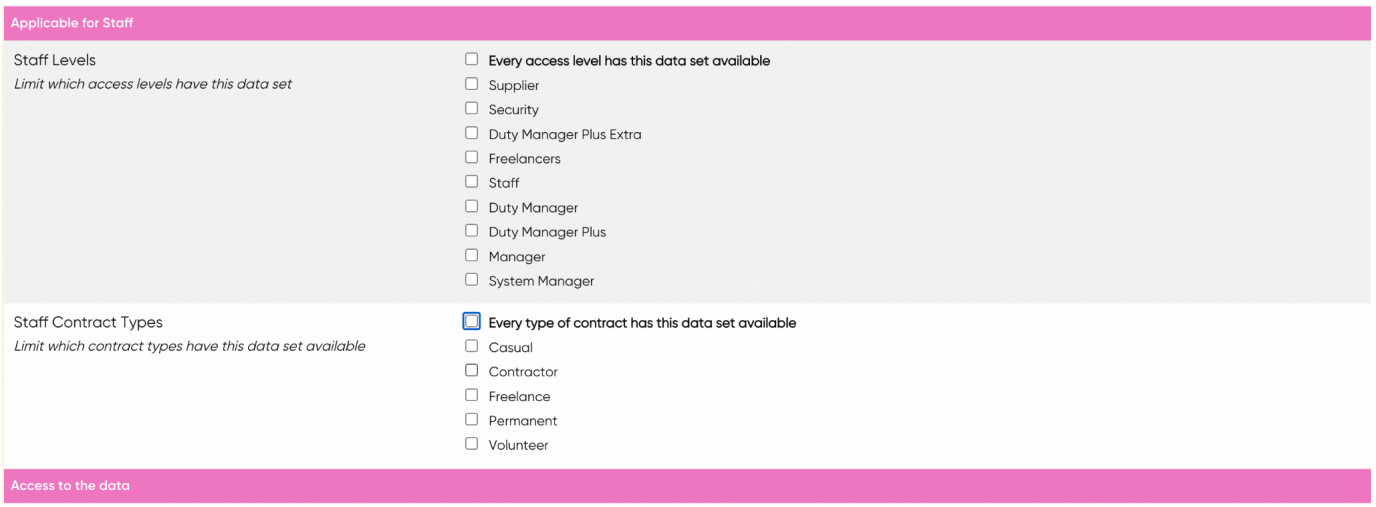


2.4. Date Field Sets can now be enabled per access level or contract type

Previously all data fields were available to all accounts. This update allows staff member's profiles to be adapted based on a staff member's access level and/or the type of contract they have assigned to them. This means volunteers might have less data collected than permanent staff for example.

You can configure any combination of applicability to the data fields; the staff member must have either the access level or the contract type assigned to be able to make use of that data field set. You can select as many or as little as you prefer.

To use: System > Staff Data and Processes > Data Sets and Fields > Edit Set Details.
Use the 'Applicable for Staff' section to select which access levels and contract types this data set will be available for.



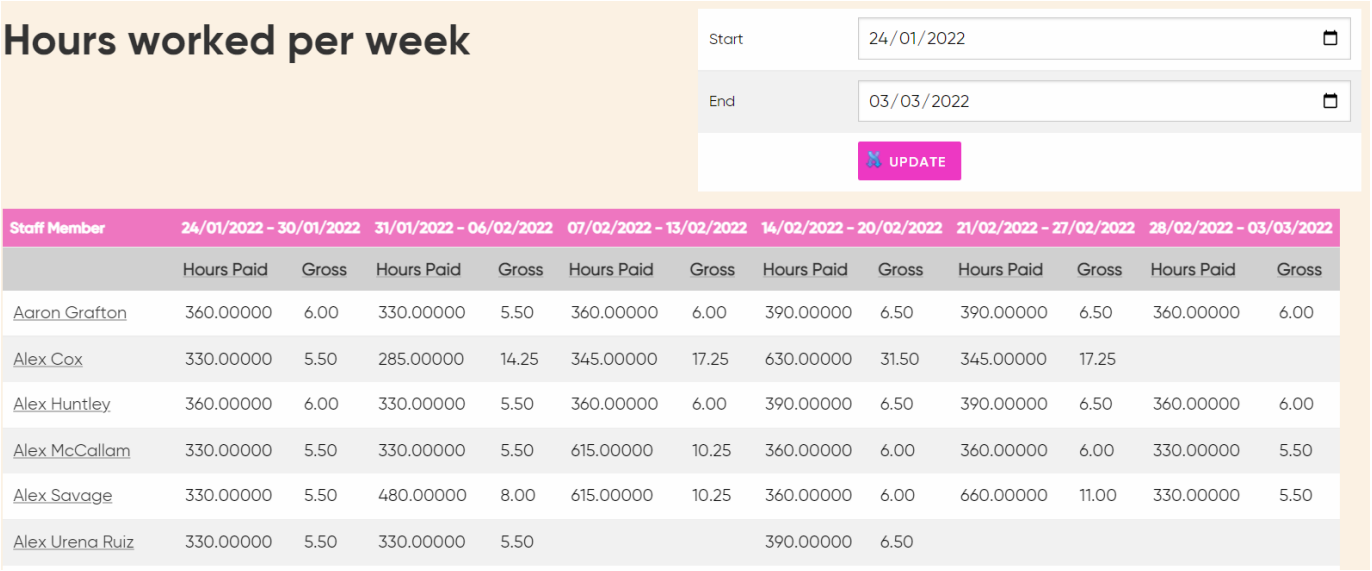
2.5. Custom Reports with weekly, monthly or yearly data

Quicker access to your data! This update allows more comprehensive aggregate reports for staff, roles and venues. This allows you to view data such as paid hours each week for any period. The report will repeat the selected columns so you can see information such as "Paid Hours in Week 1", "Paid Hours in Week 2", etc.

The reports can automatically produce data such as number of shifts per person per week for an entire year; these reports can have a huge number of columns. We recommend the download report option to be able to view this information in a concise way.

To build one of these reports, go to Reports > Manage Custom Reports. Create a new report and choose the option that includes "(split columns into…)".

The report builder will allow you to repeat any columns that use dates such as planned hours, worked hours, absences etc.



Hours worked per week

Start 24/01/2022

End 03/03/2022

UPDATE

Staff Member	24/01/2022 - 30/01/2022		31/01/2022 - 06/02/2022		07/02/2022 - 13/02/2022		14/02/2022 - 20/02/2022		21/02/2022 - 27/02/2022		28/02/2022 - 03/03/2022	
	Hours Paid	Gross	Hours Paid	Gross	Hours Paid	Gross	Hours Paid	Gross	Hours Paid	Gross	Hours Paid	Gross
Aaron Grafton	360.00000	6.00	330.00000	5.50	360.00000	6.00	390.00000	6.50	390.00000	6.50	360.00000	6.00
Alex Cox	330.00000	5.50	285.00000	14.25	345.00000	17.25	630.00000	31.50	345.00000	17.25		
Alex Huntley	360.00000	6.00	330.00000	5.50	360.00000	6.00	390.00000	6.50	390.00000	6.50	360.00000	6.00
Alex McCallam	330.00000	5.50	330.00000	5.50	615.00000	10.25	360.00000	6.00	360.00000	6.00	330.00000	5.50
Alex Savage	330.00000	5.50	480.00000	8.00	615.00000	10.25	360.00000	6.00	660.00000	11.00	330.00000	5.50
Alex Urena Ruiz	330.00000	5.50	330.00000	5.50			390.00000	6.50				

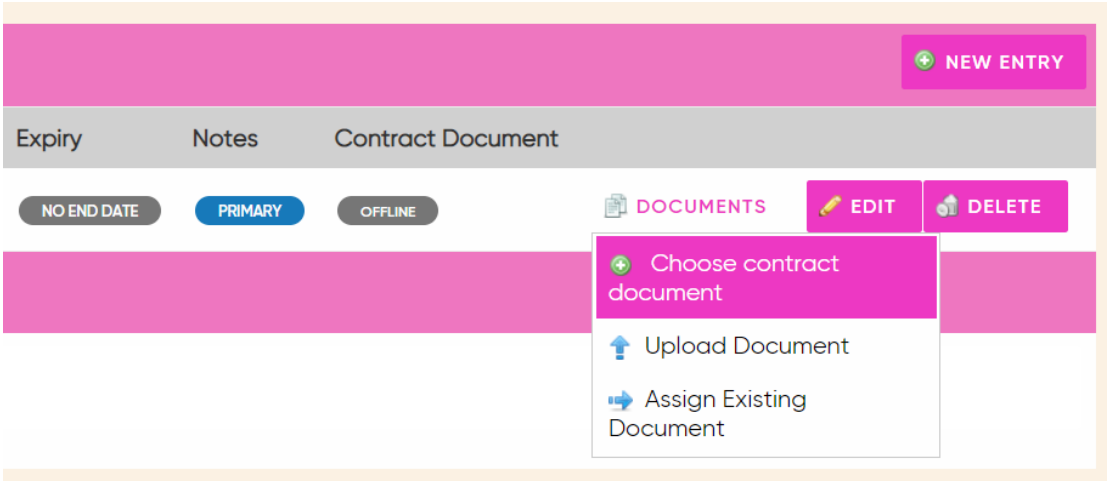
2.6. Manual Contract Documents

Previously, you would need to choose from automatically assigning a contract document as part of a contract or manually uploading an already signed copy to the staff member's account. This update allows you to now manually choose the contract document for an employee rather than automatically assigning it.

This allows greater flexibility for staff on the same contract but to have different wording within their signed agreement. It also allows you to choose when to assign the document to the staff member for signature.

To use this option, disable the automatic contract document under the contract settings. It's on the first tab within the Document Contract section.

Within a staff member's profile, go to Edit Details > Manage Contracts. For the required contract, use the Documents button and choose either Choose Contract Document or Change Contract Document. This will allow you to choose the document you wish to assign. You will also then be able to view and edit the document if required.



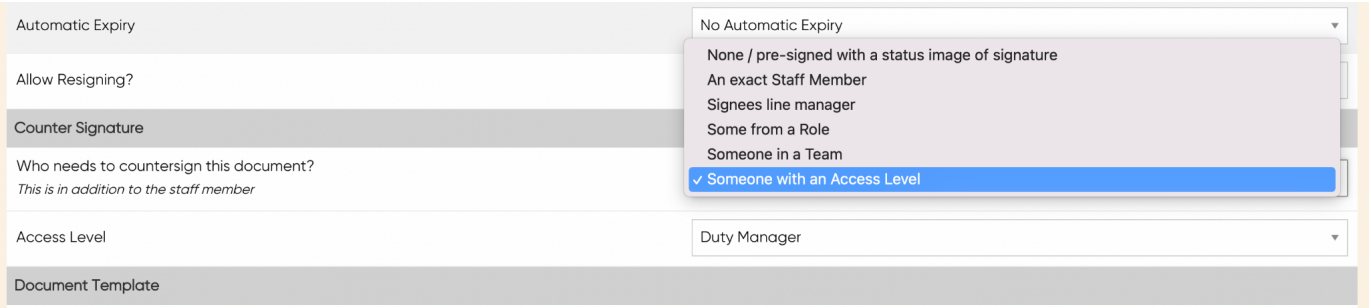
2.7. Countersigned Contract Documents

Contract Documents can now be set to have a manual countersign signature. Within the contract document, you can choose who should countersign the contract document. The system will notify that staff member once the new staff member has signed. They can then review and countersign the document.

When requiring a counter signature, you can further specify what role or position you want the counter signature to come from i.e. a manager, or someone with a certain access level.

You can then decide what access level, team, role or even specific staff member you want the signature to come from.

To use: Go to Pay > Contracts > Contract Documents and then enable counter signature..



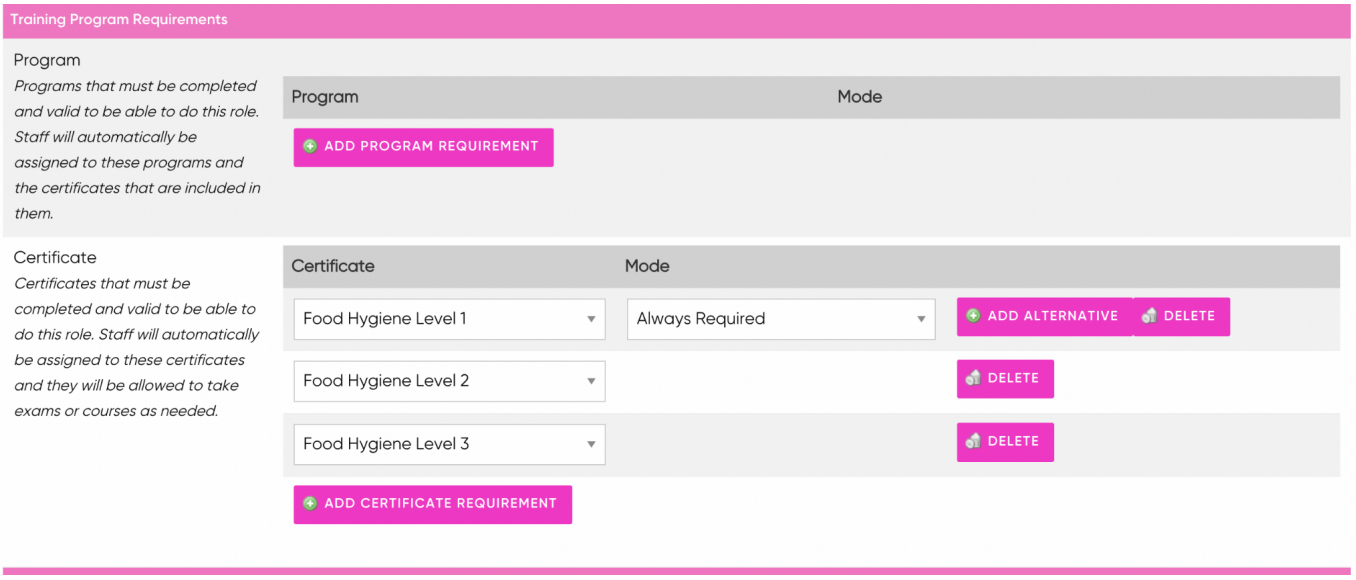
There is also a countersigned report under Reports > Staff Reports > Contract Countersign Report.

This report shows all of the contracts that are awaiting countersignatures across the organisation.

2.8. Alternative Role Certificate Requirements

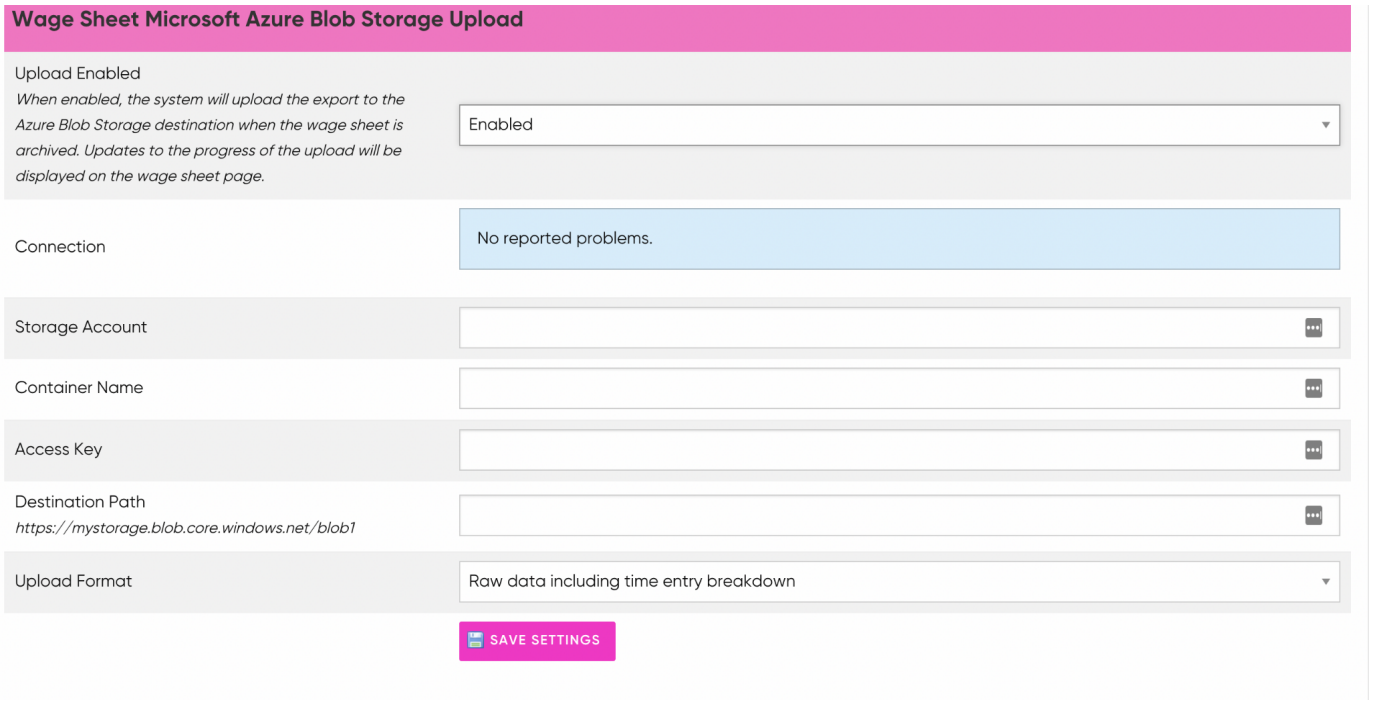
Role Certificate Requirements supports alternative certificates so one of several certificates can be valid to allow access to work that role. Once you go under Role then Requirements you can choose which certificate will be required for the role. It then allows you to 'Add an Alternative' and will present you with the same Certificate options. Once added the staff member will be able to either complete the certificate or any of the alternatives and it will fill the requirement.

This is not to be confused with adding another certificate requirement which will instead require you to complete only the certificate picked.



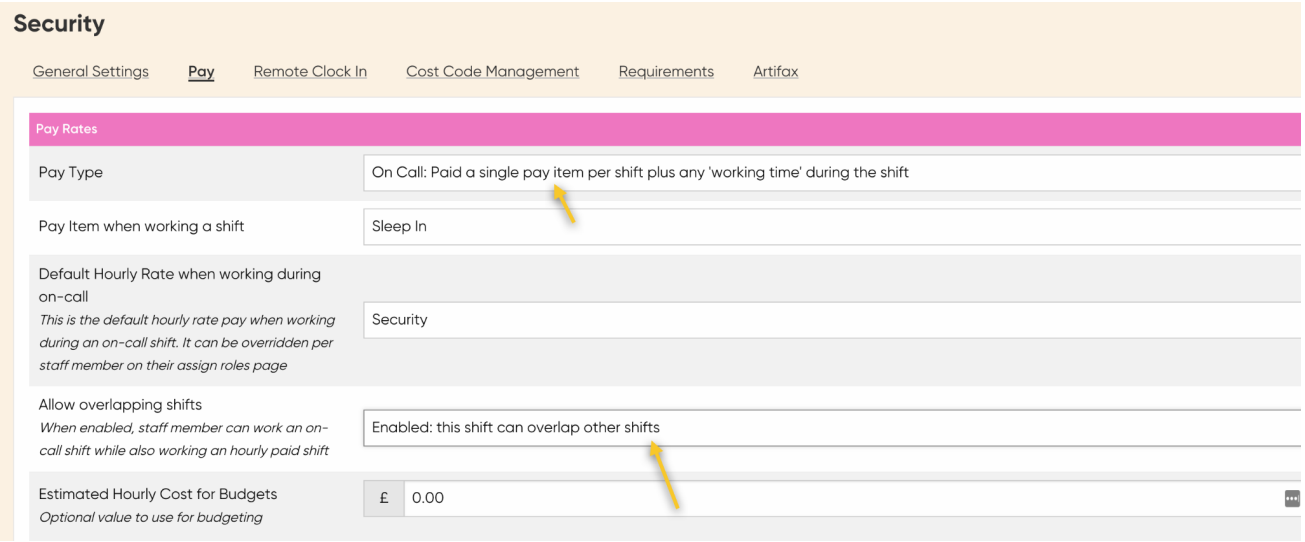
2.9. Wage Sheet Upload: Azure Blob Storage

In this update Azure Blob Storage is now supported when you are uploading your Wage Sheets. This means that when enabled, the system will upload the export to the Azure Blob Storage destination when the wage sheet is archived. Updates to the progress of the upload will be displayed on the wage sheet page. This can be enabled when you go into Integrations under the General Settings tab.



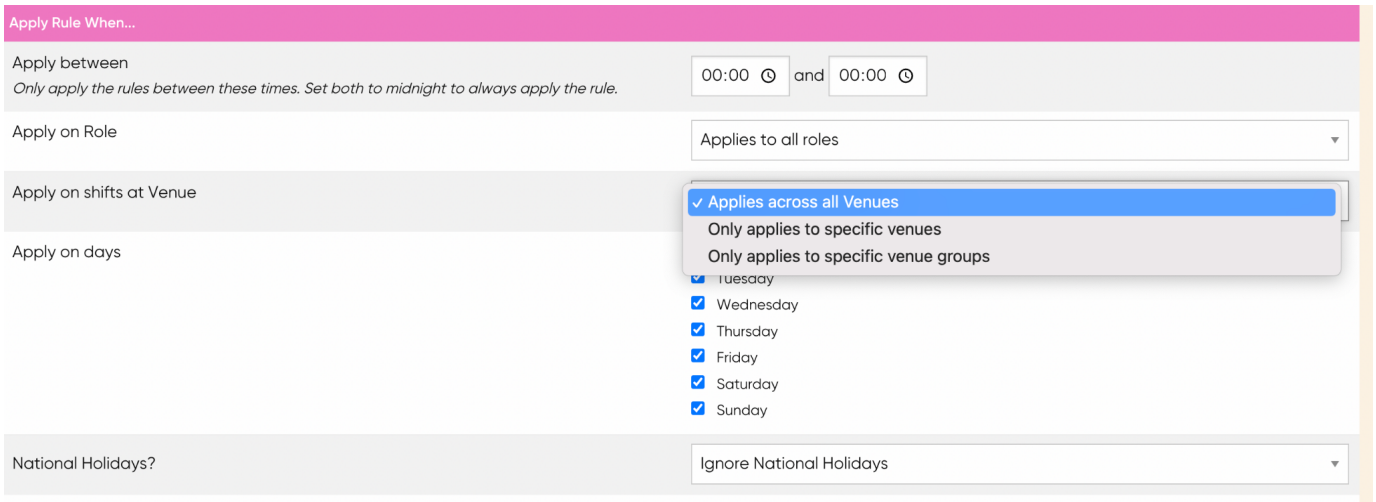
2.10. On Call Shifts

On-call shifts can now be allowed to be booked at the same time as other shifts. E.g. On call while also working another role. This allows someone to be scheduled as on call while also being able to be scheduled for regular shifts at the same time. To proceed with this you must switch Pay Type to 'On Call' as well as enabling overlapping shifts.



2.11. Manipulation Rules

Manipulation rules: venue and venue group filters now available. You can now specify whether a rule which applies to shifts will be applied across all Venues or more specifically to only Venue Groups or Specific Venues. This allows you to be more careful



2.12. Work Anniversary Entitlements

Length of Service Additional Entitlements can now be applied on the work anniversary or the start of the next entitlement year.

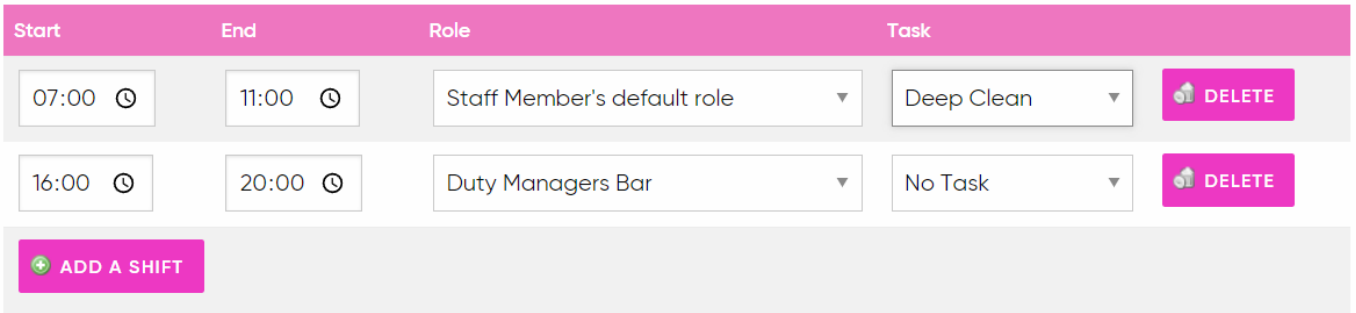
This would instantly assign the additional entitlements to the staff member on their work anniversary. They would then be able to book the additional days. If they do not have time to book the additional days before the end of the holiday year, it will be part of the rollover entitlement.

2.13. Quick Shift Templates now Include Roles and Tasks

Quick Shift Templates means you can specify which roles you will need for your Quick Shift Template. You can also specify the task they are doing, as can be seen in the image below.

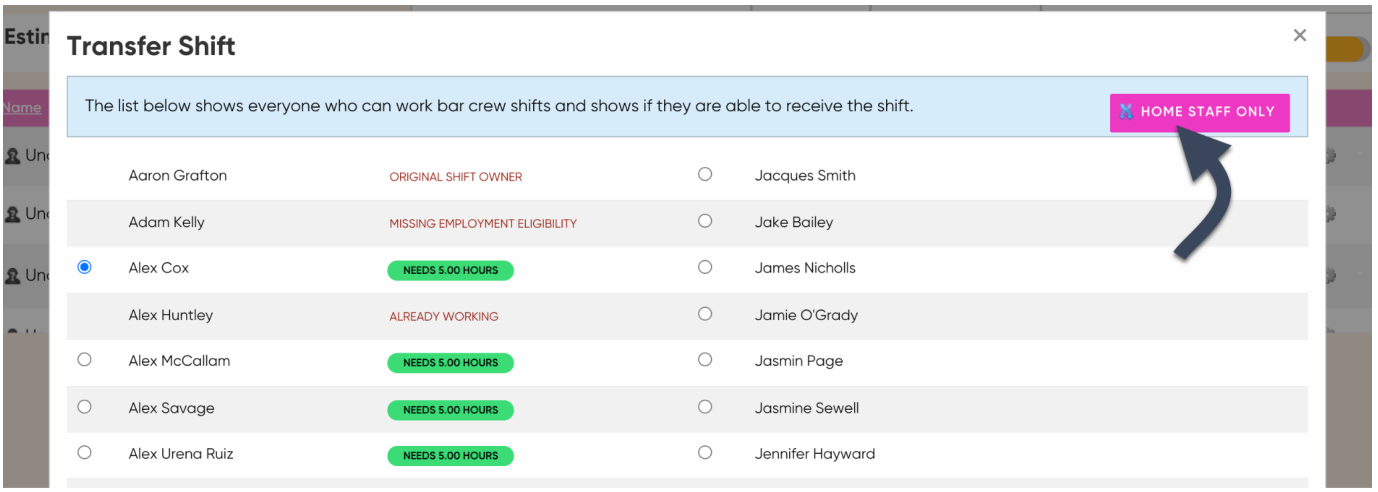
For example if you have a Promotional Launch Party you might want to specify that you need Bar Staff specifically and you need them to be doing Bar Set up. This is useful if you have a type of event which you use frequently and streamlines the Shift Template process.

If you want to be more general with your shifts you can leave this as a staff member's default role, this option just allows for more specificity.



2.14. Viewing Only Home Staff

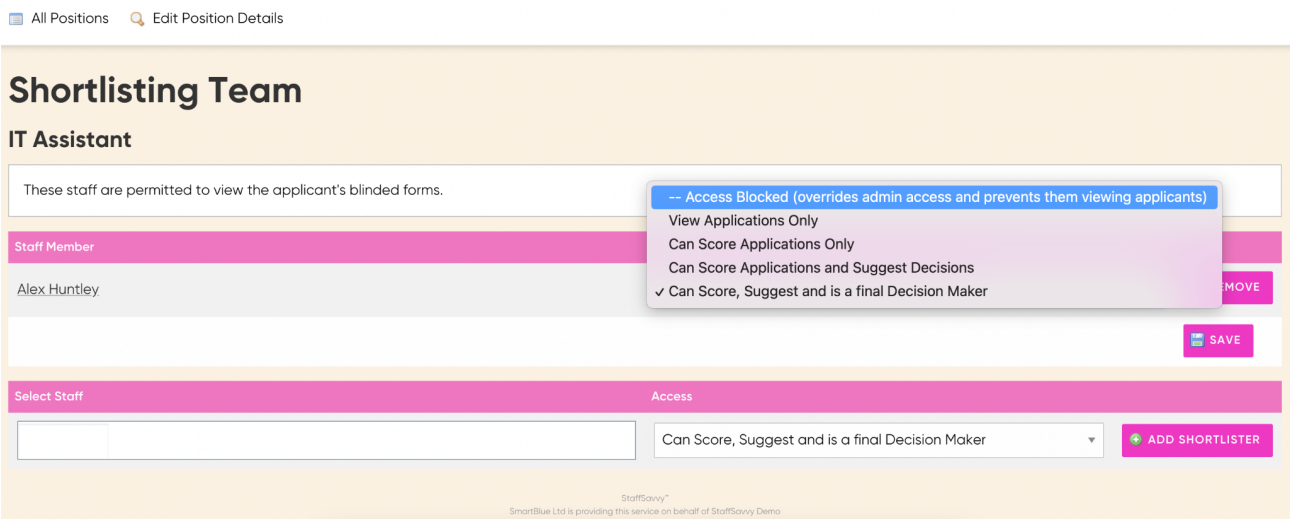
When you are transferring/assigning a shift you are able to view just the home staff rather than all who could work. You can do this by pressing the letter icon ( ). Then at the top of the page it will allow you to switch to only home staff. Then to view all staff again you simply have to click the same button at the top.



2.15. Block Staff Applying for in-House Positions from Viewing Applications

Under Recruitment: you can now use the Shortlister Manager page to block a staff member who would normally have access to the recruitment area from seeing a position. This allows them to apply to a position but not have access to any of the notes, comments or progress of applicants in that position.

To use: Manage the Short listers for the position and restrict access with the option 'Access Blocked (Overrides Admin Access)'.



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

