StaffSavvy

User Guide:
New Features & Changes
in v2023.2.0

1. New Features

1.1. Changes to Current Version & Recommended Actions

There are some 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:

- **Pay report can now limit data based on venue access**
  Previously the pay report would allow access to all staff pay within the system.
  This update means the pay report will be limited based on normal access levels.
  Actions; Review your pay report to ensure existing staff who need access continue to have access.

- **Upgraded myInterview to Widget v2**
  myInterview have discontinued the original v1 widget. This update will change the configuration so it will use the new v2 widget.
  This new widget has different configuration options and the following options are no longer available on the widget and have been removed
  - Display GDPR Notice options
  - Date Storage Region options

  Actions; none. Your integration will now use v2 of the widget.

- **Weekly timesheet view no longer shows pay as you go or earn and claim holiday**
  Earn and claim holiday is processed in many small time entry chunks to enable detailed reporting and audit the history of the earning and claiming. However, this often confuses managers on the weekly time sheet view so it's now been removed from this view. It is still available under unprocessed pay and will continue to automatically be paid out.

- **Time Specific Change is no longer available for new pay elements**
  As previously notified, we are in the process of removing the "Time Specific Change" option on pay elements. This option has limited functionality and is better suited to be managed using a manipulation rule.

  New pay elements can no longer have this option enabled. Existing pay elements should have this option disabled now. Once disabled, the option will not be able to be turned back on.

  If you have any questions on setting up a manipulation rule to perform the same task then please contact the support team.

  Actions; replace any Time Specific Change settings with a contract manipulation rule before the end of 2023.

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.

- **Momentus Enterprise (formally Ungerboeck) Integration; syncing event details into StaffSavvy for seamless scheduling**
  With this update comes a new integration with Momentus Enterprise. Momentus Enterprise is a platform that is widely used amongst our clients for creating and managing events. So, in this update we have worked together with Momentus Enterprise to ensure that you can integrate both systems seamlessly.

- **Improved holiday request process**
  It is now easier to request a holiday and is clearer for staff members with holiday entitlements. The holiday request page will now ask for broader information about the request including; is it less than a day, a single day or a longer period.

  This allows the system to then offer further options specific to the dates requested so that part day and half day requests are much easier to enter.

  The process will take into account the staff member's specific contract configuration and offer options relevant for that person. For example, a staff member who is only allowed to book half or whole days will have options limited to those choices.

- **Improved Availability Report with quick mode**
  The availability report has received an overhaul and now allows you to view between single days all the way up to a full month.

  The report also defaults to a 'quick mode' which looks at broad availability from holiday, weekly preferences, contract dates, documentation requirements and existing shifts. This allows the report to be up to 10x faster than previously possible.

  The report also allows you to view multiple roles at the same time to see if you have enough staff with the right skill sets to service the location.

- **Easier absence management from Timesheets view**
  It is now easier to report and update absences directly from the time sheet view. This allows managers to quickly report the correct absence when processing time sheets rather than having to go to staff profiles.

  Absences can also be edited here to adjust the duration or details.

  In addition, the 'add absence time entry' option on the timesheet and the information found under unprocessed pay will jointly collect absence information to correctly report on absences at the same time.

- **Quick View Manipulation Rules on Unprocessed Pay**
  This allows you to see planned changes to the time entry before the rules are applied automatically.

- Additionally, Unprocessed Pay has had a layout change, so the action bar has been tidied up so that actions are now under the 'Add' section in the top left corner.

1.3. Additional Features and Improvements

- **New options to automatically match scheduled shift items if someone is late or finishes early**

  In this new update we have included additional options that match up with scheduled shift items if someone is late or if they finish a shift earlier than scheduled. You can choose to either leave it so that your staff members are only paid starting from their scheduled start or finished time or instead when they clock in and out. Reminder that this feature is only available if you choose to enable the clock-in features available.

  This is to ensure that staff members are getting paid for the amount of time they work. This aims to be a fairer system that allows for flexibility.

  To use: First go to System > Venues > then choose which venue you are wanting to edit. Once in your venue settings you will be able to see all your configuration tabs. Click into Clock-in Configuration, then scroll down to your clock in settings.

- **New option to clear continuous employment date when there hasn't been a contract in place for weeks or months**

  In this update you are now able to clear a continuous employment date once a contract hasn't been in place for several months. This is used to help improve GDPR compliance and protect staff members data.

  To use: First go to System > Configuration > Global Settings > Staff & Contracts > Continuous employment date. Then choose the number of weeks.

- **Unprocessed Pay now allows you to see pay element and role changes before they are processed**

  In this update unprocessed pay now displays 'contract manipulation rule changes' to allow you to see pay element and role changes on this screen before they are processed into a wage sheet.

  To use: Go to Pay > then into Unprocessed Pay to view.

- **Add additional snippets of information below each crew in the photo wall**

  The new update allows you to include simple information about each staff member under their photo in the photo wall. Previously, all that was visible was a photo and their name. You are now able to add a staff member's role, access level, home venue and more under their name. This can make it easier to identify who is doing what and where in the system. You are only able to add one piece of information under each person.

  To use: Go to System > Configuration > Global Settings > Staff & Contracts > Additional Configuration.

- **Unprocessed Pay can now be filtered by contract types**

  When going through unprocessed pay you are now able to filter this by contract types. This allows you to only view certain types of contracts when viewing unprocessed pay, for example, casual contracts. This is useful if contract types are a big factor in determining pay for your company and you want to see this easily.

To use: Go to Pay > Unprocessed Pay > Then under the filter tab choose to filter by contract type.

- **Custom Reports: New reports per pay element now available**

  We have a new option for Custom Reports that allows them to be filtered by pay elements. You will need to choose 'Pay Elements'. To do this you will need to set up pay elements as your report type.

  *To use: Go to Reports > Manage custom reports **OR** Welfare and performance > Custom reports. Once there go to **View** your chosen report, then filter by pay element.*

- **Contract: Partial day deductions can now ignore expected breaks**

  To help with pay calculations the system will now be able to ignore expected breaks as part of the calculations. What this means is that the system will not include those expected breaks that might happen once the team member has left for the day into consideration when calculating pay.
  You can choose whether to calculate their breaks or simply deduct the exact hours requested.

  To use: Go to Pay > Contracts > Manage Contracts > then choose the contract you would like to edit by clicking the edit button > Once onto your contract settings go into the holiday tab > holiday settings.

- **Triggers: you can now choose to email all accounts assigned to a level**

  In this update you are able to email all accounts assigned to a specific level using our trigger filters. Whereas previously you were able to sort by role and triggers now you can also filter by level.

  This is really helpful if you are working with freelancers and contracted staff as they might require different check in forms or requirements.

  To use: System > Manage Triggers > Create a new Trigger and then when asked to add an action under the options there will now be to email everyone on a specific level, for example all freelancers, if that was a level you had created.

- **Remote Clock In - staff can now add a break retrospectively after a clock in**

  In this update, if you have the permission to retrospectively clock in then you will also be able to retrospectively include a break in your updated shift log. Only staff who are assigned to a role that allows them to clock in remotely will see the page in the menu and they will only be able to do the allowed clocking in/out per role.

  To use: For a staff member to add a retrospective break they will need to go to the remote clock-in page and log their missing entry.
  If you want to give permission for staff members to clock in remotely first you will need to go to Staff > Staff Roles > Edit the role you want to give permission to and go to clock in settings and allow the role to retrospectively clock in.

- **Added the option to show a summary of the events each day on the week view**

  You can now include the option to see a daily summary of events if this is configured in settings.

  To use: To view, go to Shifts > Manage Shift Week > In the actions bar at the top right of this page if you go *to settings > Events, you will then be able to see an event summary.*

- **Manage Shifts overview page now allows you to jump to a specific date**
  Simply use the choose a date option at the top of the grid view to change to any date and manage shifts there.
  To use: Available for all on the manage shifts screen.

- **Earn & Claim Holiday: You can now configure the system to update the hourly rate of pay to the rate of pay on the day of claim rather than on the day of earning**
  By default, earn and claim holiday is paid out at the hourly rate of pay that the hours were earned at. If you have had an hourly rate change since the holiday pay was earned then the rate will be the previous rate of pay.
  This option, available in Global Settings, will update the rate of pay to be the hourly rate on the day the pay was claimed (rather than earned).
  To use: Enable under System > Configuration > Global Settings > Staff & Contracts tab, Holiday section. The option is called "Earn & Claim Holiday Rates".

- **You can now change time entries between absence, holiday or normal time entries if there is an absence period in place**
  If you have a time entry in the system already but it is not reported as absence or holiday when it should be then you can now simply change the reporting status rather than needing to remove and re-add it.

  To use: Make sure the time entry is covered by an absence or holiday period. Then edit the time entry. You will be able to change the reporting option at the top of the time entry.
  Note: You will only be able to change it to the correct reporting type that matches the period; e.g. if they are on holiday then you can change the time entry to a holiday time entry. If they are absent then it can be changed to an absence time entry only.

- **New Trigger Events Added**

  In this update you are now able to add the following trigger events:

  - When a contract document has been assigned for signature
  - When a staff member has requested cover for a shift

    To use: Go to System > Manage Triggers > Then edit or create a new trigger. From there you will see the "triggered when.." button. Here you can choose the aforementioned trigger events/actions.

- **The thresholds for the Bradford Factor calculation can now be adjusted in the global settings.**

  You are now able to add a threshold level for the Bradford Factor calculation under your Global settings. You have the option to set the threshold for gradually increasing severity of problems and the threshold that disciplinary action would need to be taken.

  To use: Go to Global Settings > Staff and Contracts > Then go down to absences. From there you will be able to adjust your chosen threshold for the Bradford Calculation.

- **Improvements to management of custom reports**

  Managers are now able to have more control over custom reports. In addition to the new options for pay elements when creating a custom report, there are also more filtering options.

To use: Go to Reports > Manage Custom Reports > Choose to 'manage columns' on your chosen report > from here you are able to filter the report by your chosen categories.

- **Notification about time entries will now default to showing the exact time entries are to be reviewed**

  The new update shows the exact time that entries are to be reviewed and this is now the default. Previously, from your Dashboard, once you clicked on an unapproved time entry notification, it would take you directly to the daily review.

  However, previously the system wasn't able to clearly show you the time entries that you had received the notification about. With this update you can easily find and approve new time entries..

  To use: When you log in time entry notifications will appear directly on your dashboard, follow this to approve time entries.

- **Notification about time entries for direct reports can now be disabled**

  If you are wanting to disable the time entries notification this can now be enabled under settings. You are able to enable notifications for when you receive a direct report. The default has been set as 'disabled' so if you are wanting to receive direct report time entries you will need to go into your time entries/ clock in settings under your general configuration.

  To use: Go to System > Configuration > Global Settings > Time Entries/Clock in Screens.

- **Pay report now limits data based on venue access**

  With this update, you will only have access to payroll for your own specific venue. This includes managers and line managers as well. This has been implemented to help protect staff members' data in larger organisations.

  To use: Go to Pay > Unprocessed Pay and you will find that you only have access to staff information from crew from your venue.

- **Holiday Approval; repost shifts as offered shifts instead of extra**

  A new change in holiday cover is that reposted shifts can now be offered to staff rather than automatically becoming extra shifts. Please note this change can be made by a manager.

  To use: Go to System > Configuration > Global Settings > Staff and Contracts > Absences and change what the default action is for if you want to repost shifts.

- **More specific options for requesting holiday as a crew member**

  The layout under holiday requests is now a lot clearer for viewing a request. Instead of putting in the dates that you would like to take off you can now include whether you want to take off just part of a day, one whole day, or a longer period of time. This allows staff members to easily take off half days and specify exactly when they will be in the office.

To use: My Account > My Availability > Request Holiday.

- **Updates to shifts will now send email/push notifications if 'groups', 'venues' or 'shift tasks' are updated**

  There is now an automatic notification sent to staff members when any changes are made to groups, venues or shift tasks. This is to ensure that each staff member receives all information that pertains to them and might affect any upcoming shifts.

  To use: In place for all to improve notifications about changes to shifts that might affect the staff member.

- **Export 16 now requests a start week date and will highlight any backdated pay**

  In this update Export 16 will now request a start week date before exporting and also will highlight any backdated pay.

  To use: Go to Pay > Wage Sheets > Export wage sheets.

- **Rearranged the main configuration screen**

  A big change coming to StaffSavvy is the layout of the configuration screen under global settings. When viewing the main configuration screen you will see there are some changes and additions.

  There is a new tab called 'Staff & Contracts'. This has replaced the previous location of both Staff and Contracts from under the general configuration tab. This allows you to more easily make changes to your staff and contract settings.

  To use: Go to System > Configuration > Global Settings. At the top of this page you will see the new tabs running across the screen.

- **Stricter Password Policy**

  Minimum length of passwords increased and additional unacceptable password components added. This is to ensure that we can protect your security more efficiently by making staff member accounts more secure.

  To use: In place for all when they set a new password to improve account security

- **File & Document Metadata Removal**

  Uploaded images, spreadsheets & documents will have meta data such as author details, locations, summary descriptions and other information removed. This is in line with best security practices to prevent unexpected data leaking via the file metadata.

  To use: In place for all when they set a new password to improve personal security.

1.5. Issues Resolved

- Various calculation issues resolved within complex holiday settings
- Improvements made to holiday requests when using less than full time settings based on half day working patterns
- Issues with custom reports resolved including missing data for some repeating date patterns and duplicate entries for time entries reports
- Resolved issues with some available shift notifications and listings of shifts that were available at the same time as other shifts at different locations
- Improvements made to some permissions when using God mode that appeared to provide more access to the staff member than intended
- Fixed an issue with custom report date formatting where dates could show as GMT rather than local time
- Improvements to the absence report allowing easier identification of issues
- Resolved mismatch on daily review screens when using supplier accounts
- Resolved issues with automatically blocking staff holiday requests when too many request were made for the same day
- Resolved complex issues with running multiple contract manipulation rules that included minimum paid shift lengths
- Resolved issue with incorrect links used within the library. Incorrect document could be provided but access to that document was correct; no data security risk.
- Resolved issues with bulk tasks being manually marked as complete by each assignee
- Resolved display issues on ratios caused by multiple on-call shifts by the same staff member
- Over 175 minor display issues resolved

1.5. Foundation Work Completed for Future Releases

- New wage sheet export framework is now in place which allows us to build custom export formats extremely quickly. This also allows us to create bespoke formats for each client as well as general formats for payroll systems.
- Many behind the scenes changes to support our migration to the Microsoft Azure platform during the remaining months of 2023.
- New report snapshot framework which will allow for report data to be generated behind the scenes on a scheduled and then viewed, filtered, sorted and exported within the system. This will allow snapshots in time and also quicker repeat access to reports already generated.
  This also supports our work to migrate your services to the Azure platform.

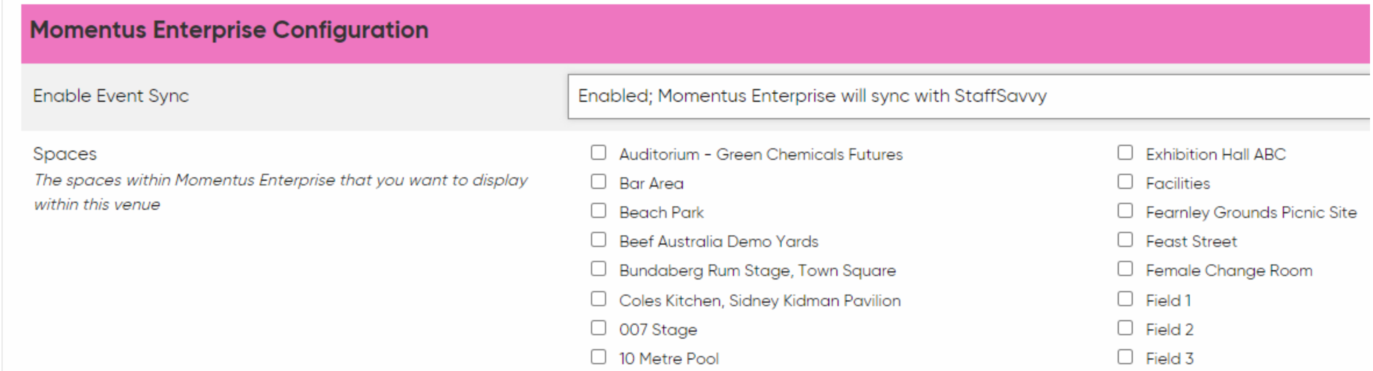
2. In Detail...

2.1. Momentus Enterprise (formally Ungerboeck) Integration

Enabled under the integrations tab of Global Settings, this integration follows the existing processes for event integrations. You will need the Momentus Enterprise API purchased on your account to use the integration.

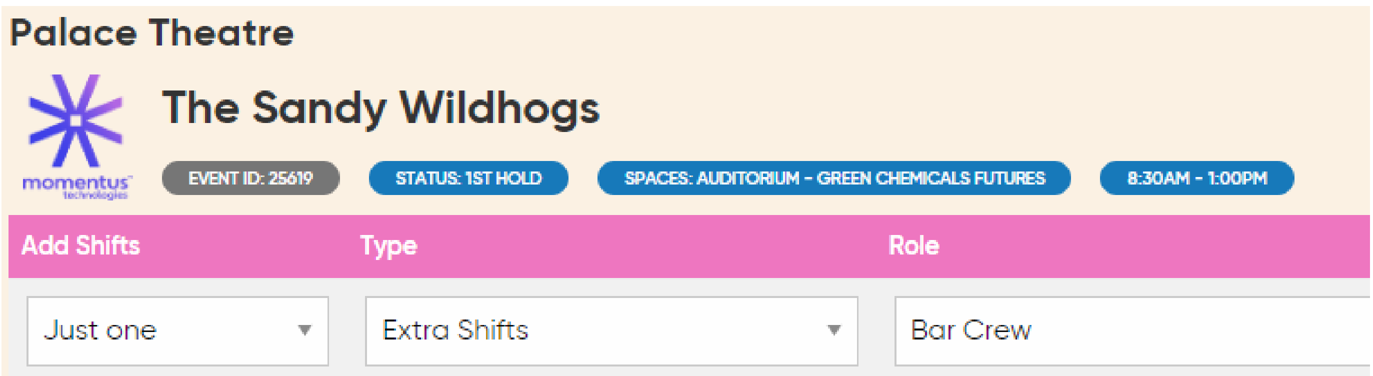
Once you have that enabled and entered the required API details and organisation number, the system will start to sync the basic data such as spaces and event statuses. These will be displayed within the venue configuration pages.

Once Momentus Enterprise has been enabled, you will be able to configure the integration within each venue. As per the integrations with Artifax Event, Yesplan and Momentus Elite (formally VenueOps), you can choose the spaces to use when syncing events.



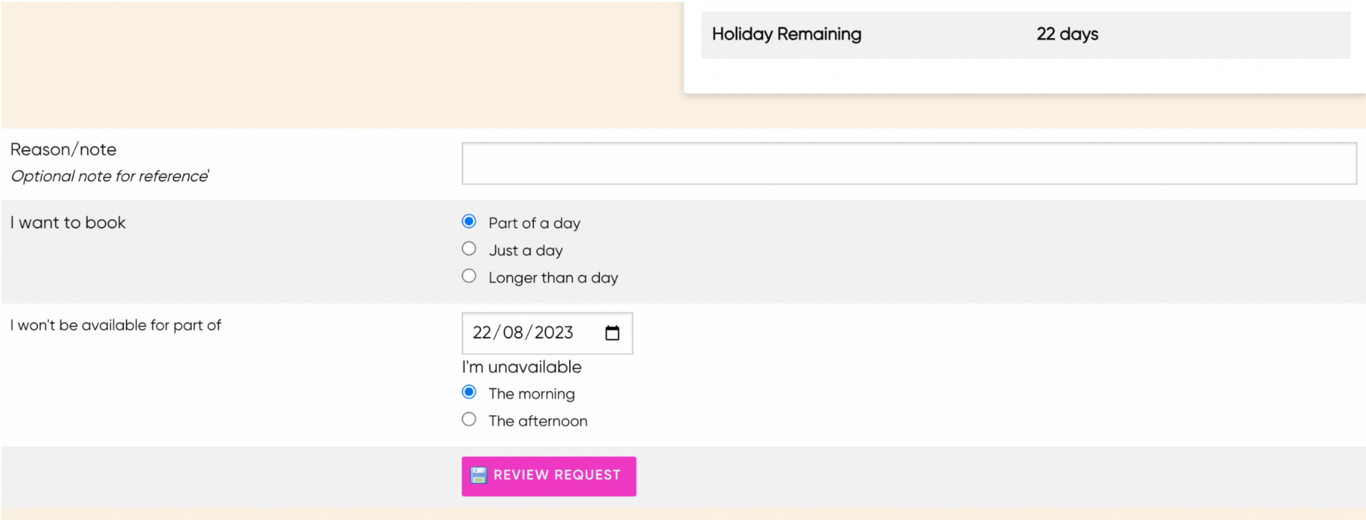
You are also able to pick and choose which event statuses should be displayed within StaffSavvy.

This will automatically pull the event details into the shift scheduling screens and can include details such as the event ID, which spaces are included and the event times.



2.2. Improved Holiday Request Process

It is now easier to request a holiday and is clearer for staff members with holiday entitlements. The screen will now ask for broad information about the request; is it less than a day, a single day or a longer period. To implement this you just need to go to your availability and put in a new holiday request.



This allows the system to then offer further options specific to the dates requested so that part day and half day requests are much easier to enter.

Another updated feature is that when requesting to take part of a day off, you can specify whether this will be the morning or the afternoon. This adjustment will make absences that much easier to keep track of, ensuring the smooth running of your business regardless of absence.

The process will take into account the staff member's specific contract configuration and offer options relevant. For example, a staff member who is only allowed to book half or whole days will have options limited to those choices.

2.3. Improved Availability Report with quick mode

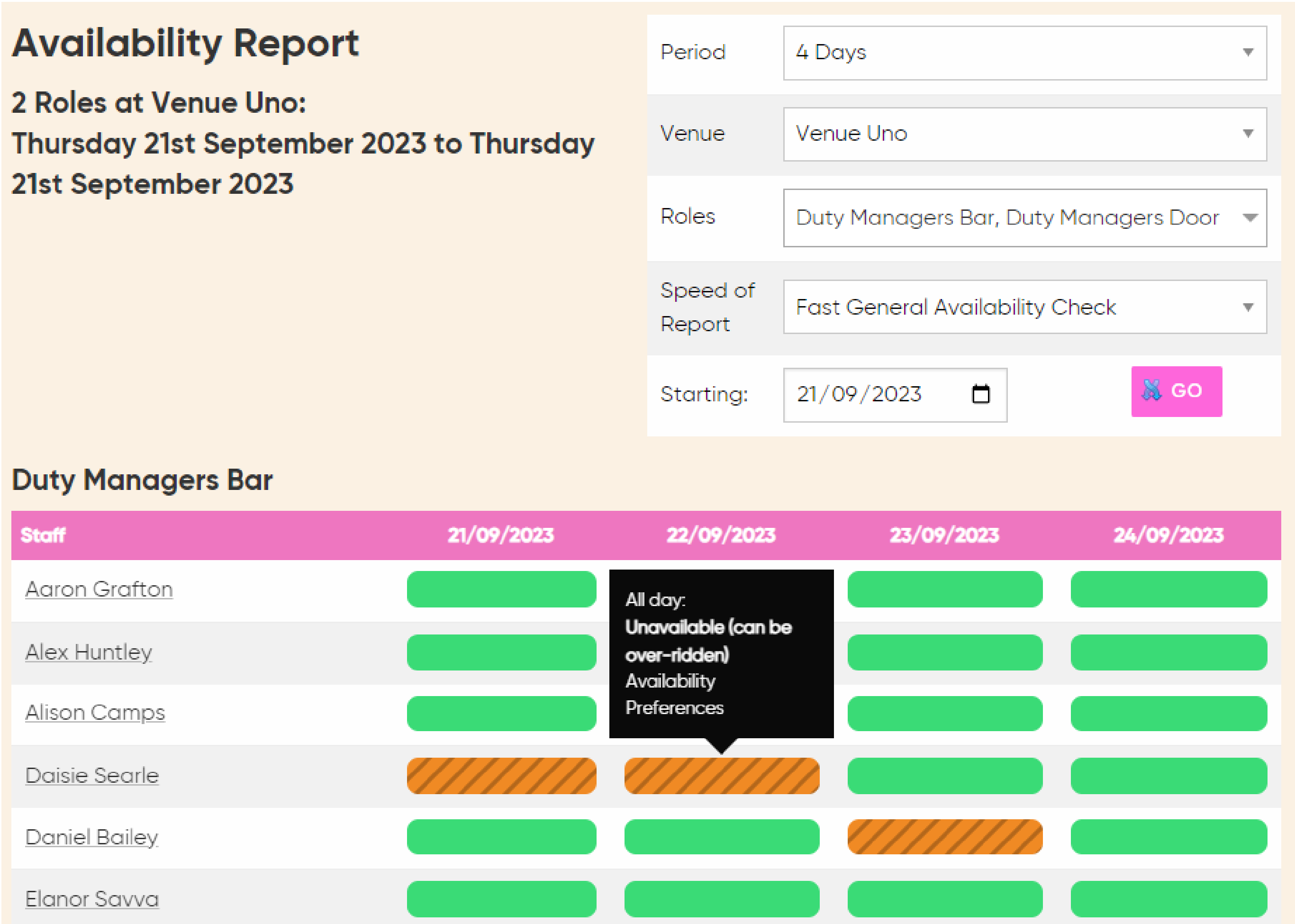
Previously our Weekly Availability Report only allowed you to view a single role and for a fixed week at a time. The report could take a long time to load as it looked carefully at each hour for every staff member across the 7 days.

This update changes the report to a more flexible option; you can choose the duration to view (anything from a single day to a full month). You are also able to choose a specific start date rather than a fixed week view.

The role selection is now multiple choice which will show each role down the page and allow staff to be displayed in multiple roles at once.

This report also has two levels of detail; the original complex level that will look at contract limits, rest periods and more for every hour (and is very slow) and a new faster option to get general availability.

This general availability will look at contract dates, required documents, work eligibility documents, booked holiday, planned absences, availability preferences and planned shifts. It is designed to provide a quick and easy view of general availability across the team.

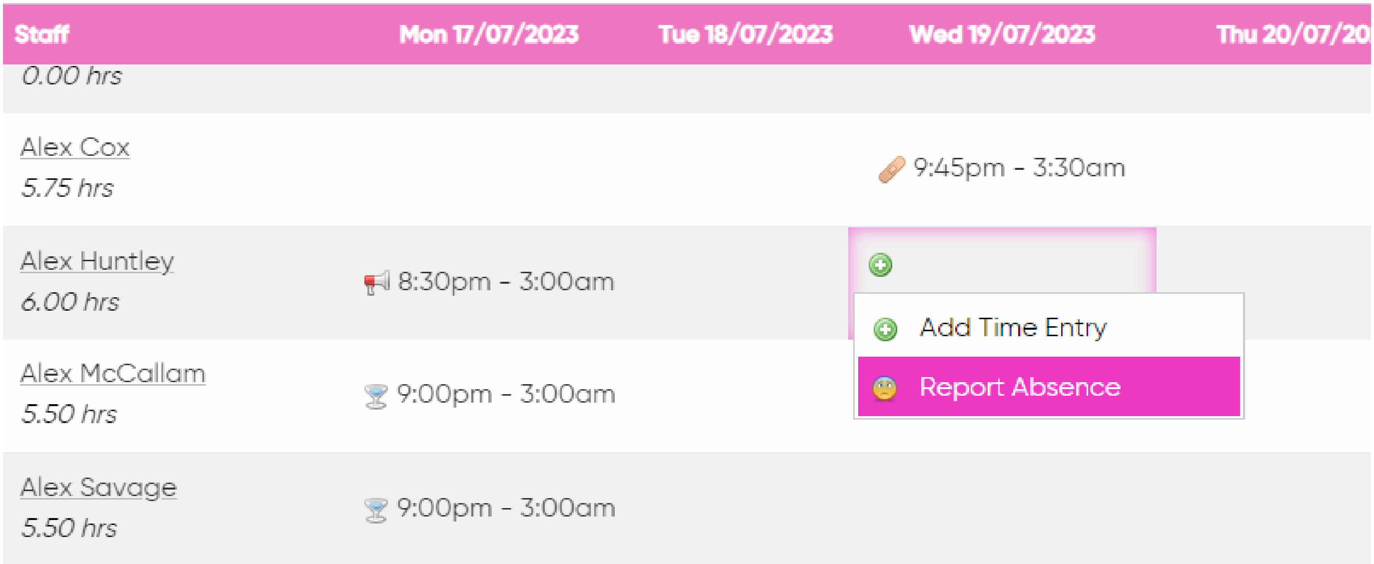


2.4. Managing Absence on Timesheets view

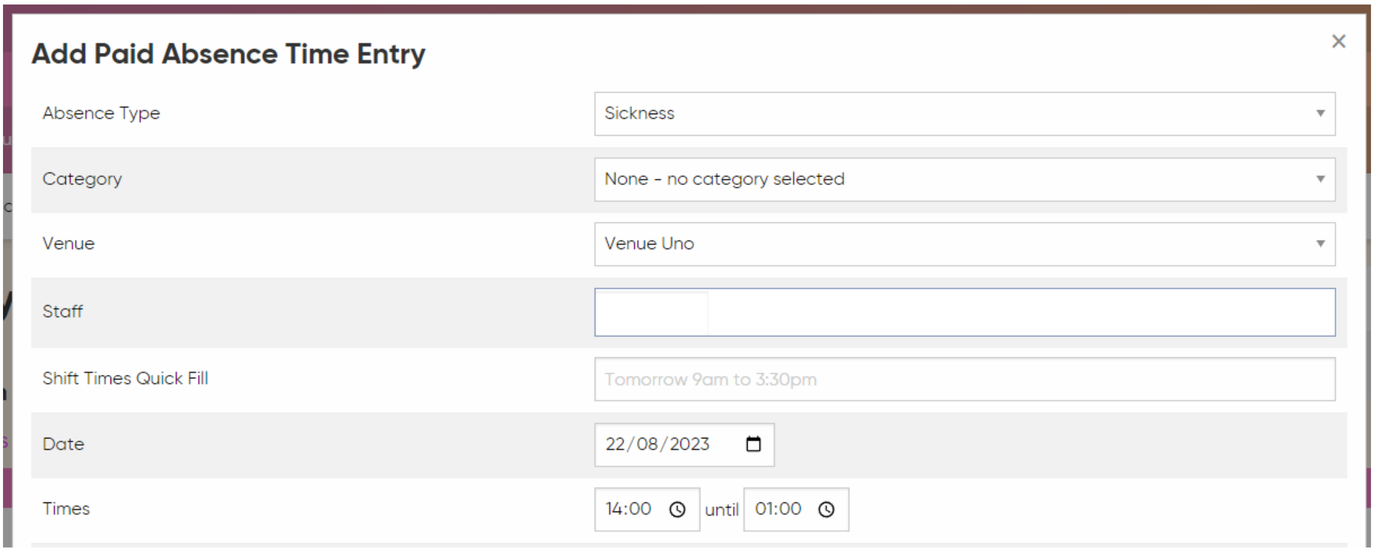
It is now easier to report and update absences directly from the time sheet view.

This new update adds the option for managers to report the correct absence when processing time sheets rather than having to go to staff profiles.

Just hover over the day as you would normally do to add a time entry and choose the Report Absence instead. Absences can also be edited here to adjust the duration or details.



In addition, 'the add absence time entry' option on the timesheet and unprocessed pay views will collect absence information to correctly report on absences at the same time.



2.4. Quick View Manipulation Rules on Unprocessed Pay

We've added a new quick view popup on unprocessed pay that allows you to see any changes that will be made by contract manipulation rules once the time entry has been approved and processed into a wage sheet.

This will be shown using an icon (as in the screenshot below) and on click, it will display the planned changes.

These changes will be processed when the time entry is put into a wage sheet. This allows you to focus on the correct times and roles for a time entry and any further changes will be performed automatically. You can also see a full breakdown of the changes if you view the details page for any time entry.