



User Guide: New Features & Changes in v2025.3.0

1. New Features

1.1. Changes to Current Version & Recommended Actions

This update introduces changes to the system that you should be aware of.

- **Email-based Multi-Factor Authentication**

To boost the security of the service, we are introducing mandatory Email MFA. This means that all accounts that do not already have device-based MFA or Single Sign-On enabled will receive an email code when they attempt to sign in.

This code must be entered on the site to allow them to complete their login.

This process helps to prevent brute-force hacking attempts or password stealing.

Recommended Actions: Inform your staff that they will soon need to confirm their logins if this applies to you.

Additional recommendation: we recommend that all accounts that have access to any staff member's private data require device-based MFA. This can be enforced per access level. If you have any questions about this, please contact our support team.

- **Update Holiday Calculations when editing contracts or contract records**

In the previous update, we enabled the system to automatically correct holiday deductions and calculations whenever there was a change to contracts. This was implemented following feedback from users that any changes or corrections to contract settings meant a lot of manual updates to past holiday deductions. However, some users have situations where they do not want recalculations to happen automatically each time. We've listened to this feedback and you will now see the option to reevaluate holiday when making contract changes or to leave the calculations as they are. For safety, the system will always default to not changing the calculations.

Recommended Actions: None

- **New permission to view colleagues**

We have updated the system so that by default staff will not be able to view colleagues for their shifts. If you want staff to be able to view other colleagues working on their shift, this is now a specific permission that falls under the Staff Management category that must be enabled. The permission allows staff to view other staff members working at the same time within the same venue.

Recommended Actions: This permission will be enabled by default for existing clients. If you wish to remove this access, go to System > Levels & Permissions > Manage permissions and adjust the 'View my colleagues on shift' permission.

1.2. Headline New Features:

Below is a brief introduction to the new features of this update. For a more detailed look into each of these features, go to our 'In Detail' section towards the end of this guide.

- **Automatically pay staff for training**

In this update, you now have the option to pay staff for the time they spend working through exams, courses, and modules.

To use: To set this up, go to Training > Exams > Manage Exams > Create New Exams > Enable Time Entries. This formatting applies similarly to Modules. Go to Training > Training Plan > Manage Modules > Create Modules. Ensure you have enabled time entries and review your payment settings.

- **SCIM integration**

In this update, we have new support for automatic account provisioning via SCIM (which supports Microsoft Entra and others) and SSO. This new option allows StaffSavvy to work with SCIM identity providers, which then facilitates clients to be able to import and update user information from different platforms into StaffSavvy.

To use: Go to System > Configuration > Global Settings > SCIM & SSO. For more details, see our further details section.

- **Schedule templates across multiple days**

This update enables you to create schedule templates that span multiple days, up to 100 days in length, and place them with a single click.

To use: Go to Shifts > Schedule Creation > Manage Templates > Create new Template. Then enable the 'Multiple Day Template' option. For a more detailed explanation, go to our further details section.

- **Flexible shift schedule release**

This update offers a new, more flexible release shift schedule. There are several new options regarding how staff are notified about shifts, with the system now allowing different skills to receive shift notifications at different times and being able to publish unassigned shifts. These new options also allow managers to view and cancel upcoming schedules more easily. *To use: Go to Shifts > Manage Shifts. In the action bar where you can send shift notifications to staff, the options on how and to whom to send shifts have changed.*

- **Choose how shifts can be assigned to individual staff members based on each skill**

You can now choose how shifts are assigned per staff member based on their Skills. These options let you restrict scheduling down to the individual level. Choose whether shifts can be added automatically to a staff member's schedule via templated shifts or choose to only allow shifts to be added by managers. You can even set this so each Skill a staff member has uses a different configuration.

To use: Turn this option on in Global Settings > Configuration > Shifts. Enable the option 'Control how shifts are assigned per skill'. Then, change the options for each staff member.

- **New options to choose what "Fair rota" scheduling uses**

In this new update, you can adjust how the system calculates a fair rota when scheduling in bulk. This will be determined by whether the system draws data from hours staff have worked or by days worked.

To use: Go to Shifts > Schedule Creation > Select Create Preview Shifts from the actions menu. Then, under one of the options, you should now see the Fair Rota Logic option. From here, select which logic option you prefer. For more information, see our in detail section.

- **Following day option in Quick Shift Templates**

Quick Shift Templates now includes an option that allows the template to run across the following day, which can be used for overnight shifts where you need to schedule a shift the following day.

To use: Go to Shifts > Manage Shifts Schedule > Click Manage Quick Shift Templates and create a new template. There is now a tick box next to the task that you can check to select the following day.

- **Holiday Availability report: See blocked holiday dates**

The New Holiday Availability report option allows staff to see if any upcoming days will be blocked or a warning will be shown. This is useful for allowing staff to see available dates before booking and whether they are likely to get them off before making the request, helping the approval process run more smoothly. If the dates are all okay, you will see a green box saying requests are allowed. This allows staff to see when they might have holiday approved or rejected if there are automatic warning or blocking rules in place. They cannot see who has already booked a holiday, just a traffic light report for each day.

This is useful for use with ratio restrictions on holidays. For example, if you need a certain number of managers available and have a ratio restriction in place, it will also show up with a warning if your holiday would impact ratios.

To use: Go to System > Access Levels & Permissions > Manage permissions. Enable Holiday Availability. Then, the staff must visit My Account > My availability > Holiday Availability.

- **Merge Yearly Holiday allowances**

Holiday allowances can now be merged together for multiple, different contract periods across a holiday year. However, this can only be applied if all parts of the year use the same entitlement options. If not enabled, holiday will be limited to a single contract period, with any leftover holiday rolling over.

To use: Go to System > Global Settings > Staff & Contracts > Under the holiday options, enable the 'Merge multiple contract periods together for a yearly holiday total' option.

- **Tax breakdowns can now be recorded in expenses**

Under expense pay items, you can now include a tax breakdown (gross, tax, and net values) for each pay element you create. When creating a pay element, select the pay type 'Expenses with Tax Details' to be able to add tax information to accompany your expense. Then, when staff go to add a new expense, they can choose this new option. You will need to add the value and the tax value. Then, if adding a photo receipt, ensure both of these numbers are included.

To use: Go to Pay > Pay Settings > Pay Elements and create a new pay element. Under Pay Type, you will now see the option to select Expenses (With Tax Details). Create a new pay element with this pay type and then grant approval permission to staff to add it as an expense option.

Once this has been created, go to approval permissions and set all staff members who should be allowed to add an expense claim. Then, to add an expense, the staff member must go to My Account > My Expenses.

1.3. Additional Improvements

- **Edit Certificate dates in training history**

You can now edit each certificate and modify the completion and expiry dates in a staff member's training history.

To use: Go to the profile of the staff member whose certificate dates you would like to edit. In the actions bar, select Manage training progress. Under Training Status, you can click to edit the completion time, date, and expiry of any certificate that has been completed. You can edit this by clicking 'View Certificate History Report' in the actions bar. From here, you can make the same changes, but you can also change the status from 'passed' to 'passed but now expired'. To do this on your own account, go to Training > My Training Status > View 'Certificate History Report' from the actions menu.

- **View deployments without edit access**

There is a new permission that allows staff to view all deployments, separate from the permission that allows staff to edit a deployment. This is a permission level, so you can select who to share this with, whether this goes out to all staff or just certain access levels or Skills, such as supervisors. Once enabled, staff can view all upcoming deployments that have been created; however, this view-only permission does not allow them to edit these deployments. This is useful for sharing deployment positions without relying solely on printouts.

To use: A system manager will need to go to System > Levels & Permissions > Manage Permissions and enable the permission. Shifts > View all deployments > Shift deployments.

- **New trigger action: Email squad leaders**

We have added the ability to trigger an email to squad leaders when an event has happened. Previous updates also saw the ability to trigger an email to line managers. However, we have now added the ability to email squad leaders if an action needs to be taken at the squad level. How might this look? An example of this might be that a trigger is initiated upon adding a staff member to a squad: the action would be to email the squad leader.

To use: Go to System > Manage Triggers. Then create a trigger and add an action (or edit actions). Under your action options, there is now the option to email squad leaders.

- **New trigger event: unapproved holiday alert**

This update now includes a trigger event that will alert about an unapproved holiday within an upcoming timeframe. If a holiday awaits approval and the holiday dates are about to come up, an action would be triggered. You can select how many days before the unapproved holiday is due to take place, and what action would then be initiated. For example, you might send a message to Line managers (action) 3 days before the unapproved holiday was meant to take place (event), to alert them that the holiday was still awaiting approval.

To use: Go to System > Manage Triggers. Create a new trigger. Choose the Holiday Awaiting approval option under Triggered when.

- **New Contract restrictions on limiting hours worked**

The new update now supports two new options that limit or prevent the hours worked between certain times under contract restrictions.

There are two options: one that limits the number of hours that can be worked between certain times and the other that restricts when shifts can be created, depending on the time of day.

For the 'Prevent shifts between certain times' option, you must set the times between which shifts can be scheduled, and shifts cannot be added at any other time.

The second new option, 'Limit of hours between certain times,' is more complex. With this option, you must again select the time period during which shifts cannot be added and how long the time range you are working with will be. Then, select the maximum number of hours that can be assigned within that time range. Remember that shifts can only be assigned within the set time period. For example, you might say there can only be a maximum of 40 hours assigned within a week, and the hours assigned must be between 8am - 8pm. This is a helpful feature if you have a certain period within the year that requires very specific restrictions.

To use: Go to Pay > Contracts > Restriction Rules > Create a new restriction rule. Under the restriction type, select Limit shifts between certain times OR Prevent shifts between certain times.

- **Contract Restrictions: maximum gap**

Contract Restrictions now support you in implementing a maximum gap between shifts to ensure staff do not need to wait for extended periods between shifts. This means you can set the maximum time allowed for staff to wait between shifts.

This option prevents staff from having a large gap between shifts (hours long) within the same day. This option can be set up to allow a short gap (e.g. 0.5 hours, 2 hours) between shifts, but a bigger gap (5 hours, for example) would be blocked. So, under the 'Block a gap between shifts longer than' option, you might choose 4 hours as the maximum gap.

This means that if a staff member works until 1pm, they could be asked to work again at 2pm, but would not be able to work at 6pm as the gap between shifts is too big. This is set up so that managers can ask someone to work again if they are likely already on site, but it prevents a situation where they would be waiting around for hours for a second shift.

You can also set the restriction to clear after a period, e.g., after 11 hours. This is under the 'Prevent further Shifts for' option. So, if the time for a new shift has exceeded the maximum gap, you would select how many hours until the staff member can be assigned a new shift, which would probably be the next day.

To use: Go to Pay > Contracts > Restriction Rules > Create a new restriction rule. Under the restriction type, select 'Prevent a gap between shifts' and set up your options.

- **9 week contract hours period.**

This update allows you to set a 9-week contract period. This option has been requested and provides more flexibility for your contracts.

To use: Go to Pay > Contracts > Manage Contracts. Edit the Contract you want to change, and then under the Details tab, under Contracted Hours > Period, you can set it to 9 weeks.

- **New Custom Report Columns for Staff Reports**

This update introduces new report columns for our staff report types, including:

- **Expected Archive Date** - Based on automatic archive rules if enabled for this profile
- **Number of shifts assigned to each deployment pattern** - Total number of planned or completed shifts where the staff member is assigned to the selected deployment pattern

- **Number of shifts assigned to each deployment position** - Total number of planned or completed shifts where the staff member is assigned to the selected deployment position
- **List of secondary contracts** - A list of any secondary contracts active on a profile
- There are new columns to report on shift statistics:
 - Number of occurrences staff member has provided cover to others
 - Number of occurrences staff member has been covered by others
 - Number of occurrences staff member has had a shift cancelled
- There are also several new options for reporting on shift offers, including:
 - Number of offers to work shifts (based on the shift date)
 - Number of offers to work shifts (based on the offer date)
 - Number of successful offers to work shifts (based on the shift date)
 - Number of successful offers to work shifts (based on the offer date)
 - Number of unsuccessful offers to work shifts (based on the shift date)
 - Number of unsuccessful offers to work shifts (based on the offer date)

To use: Go to Reports > Manage Custom Reports > Create new report. Select any of the staff report type options and create your report.

- **Skill requirements warning banner**

This update means that if you have a skill requirement that needs to be fulfilled, the notification will appear in an orange box at the top of your dashboard, displaying a warning banner. This applies whether the Skill requirement is required before a staff member can work that shift, or if the requirements are only requested rather than required.

To use: This will be implemented automatically if you have added Skill requirements and will appear on the dashboard of a staff member who is missing requirements. To add a Skill request, go to edit a Skill and under the Requirements tab, under mode select 'requested not required'.

- **Performance forms now include new date options**

This update now offers more date formatting options for performance and welfare forms. These new options include setting the answer format to a date. This can be any date, and the question might be, 'What was the date of your last performance review?', and the user would then answer with the date format. For a performance and welfare form, you can also set a future date (users would only be able to select a date that came after the current date) and a past date (users would only be able to choose a date before the current date).

To use: Go to System > Documents & Forms > Manage Performance and Welfare forms. Ensure you have set up the details for your performance and welfare form. Then, when adding questions, you will see these new options under Answer format.

- **Adjust hourly rates with manipulation rules**

You can now automatically adjust hourly rates using manipulation rules. This is the new Multiply Hourly Rate By option, which is available when creating a new manipulation rule. This option will multiply the hourly rate. You must choose how much this will be multiplied by; it can be anything between 0 and 9.95. For example, you could multiply the hourly wage by .5, and 1 hour would become 0.5 hours. There is also the option to multiply by thirds. (The actual hours worked and the pay element it is reported as will not be affected.)

To use: Go to Pay > Contracts Manipulation Rules. Under the Changes to make section, enable the Multiply Hourly Rate By option.

- **Personal Record categories**

Staff personal records can now be set into categories, which are also displayed on profiles under the personal record tab. This helps organise personal record types as they expand.

To use: Go to System > Documents and Forms > Personal record templates. Create or edit a personal record and type in a category. To create a new category, write a new category title in the category box, and once saved, it will become a category to which you can add new records.

- **Contract restrictions and manipulation rules can now be copied**

You can now copy a manipulation rule or a restriction rule when viewing your list of rules. When you click the copy button, it duplicates the rule and takes you straight into settings, where you can make any adjustments to the rule and give it a different title.

To use: Go to Pay > Contracts > select Manipulation or Restriction rules, and press copy next to each rule on those pages.

- **Display Deployments hours before shift**

The ability to display deployments X hours before a shift (but not earlier) is now available. This must be set up in your venue configuration, where you can select how many hours before a shift starts that staff can see deployments. This feature works well with our new View Deployments feature, giving staff more access to deployments before their shifts.

To use: Go to System > Venues > Manage Venues > edit the venue you want to change. Go to the Shifts configuration tab. You will find a new Deployments tab, and then under the 'Show Deployments on Shift Details' option, select how many hours before the shift you want deployments to appear for staff on the View Deployments page.

- **Deployments won't print non-attended shifts**

When printing deployments out, your printout will no longer show shifts marked as having non-attendance, whereas previously, it would automatically print out all deployments. This change is to improve the clarity of deployments.

To use: Go to Shifts > Manage Deployments > Shift Deployments, select the day you want to print.

- **Remote clock-in uses the default Skill**

When using remote clock-in, the system now pre-selects the staff member's default skill by default, whereas previously, it would automatically default to alphabetical.

To use: Go to Shifts > Remote Clock-in. Under 'I am working as,' it will automatically appear as the staff member's default Skill.

- **Document completion by staff**

This update has refined the options for document upload. There are now three options: documents can be set so that a manager can upload them. Staff members can complete them, but only if directed via tasks or other actions; they cannot simply upload/complete a copy at will. The last option allows staff to upload a document themselves at any time.

This must be set up when creating a document type so the system knows what you want to do. These changes only apply to document types where you must upload a document.

To use: Go to System > Documents & Forms > Manage Document Types > Create new Document Type. Under Document Management, we have updated the Staff Upload/Completion option. Choose one of the three options.

- **Reinstate expired certificates**

You can now reinstate expired certificate records when removing or extending automatic expiry dates. To do this, you must tell the system to reset expiry dates and update any expired records (if they should now be valid) when expiry dates have been manually changed.

Go to: Training > Training Plan > Manage Certificates. Edit a certificate. Under the Reset Expiry Dates option, select 'Yes. Remove expiry dates if they are now valid with the new expiry duration' option.

- **Limit TOIL rows on profiles**

You can now limit the number of TOIL rows shown on profiles. You can set the exact number of TOIL rows, which can be between 10 and 100. This is useful to help organise and keep staff profiles succinct and clear.

To use: Go to System > Configuration > Global Settings > Under the Staff & Contracts tab, go to the limit TOIL rows on profile.

- **Decimal hours on a contract restriction**

There is now the ability to set decimal hours on a contract restriction.

To use: Go to Pay > Contracts > Restriction rules. Create a new restriction rule, and depending on the restriction type, you can change the number of hours to the decimal point.

- **Set expiry on a job offer**

You can now set an expiry on a job offer. When reviewing applications and deciding to offer a position, you can add an expiry. This means that the applicant will have a certain amount of time to accept a position before the offer will be automatically rejected. You can set a date and time for the expiry.

To use: Go to the Recruitment tab and into Manage Positions. When offering a position, you can now add an expiry date.

- **Ability to issue a new TrustId link**

TrustId is an identity checking service that can validate identity documents. With our new update, there is now the ability to issue **new** TrustId links to staff on their work eligibility console. This will only be used if staff have failed with TrustId and need an urgent new link. Staff will normally be able to receive a new link within 24 hours except when they have had three or more consecutive failures.

To use: Go to Global Settings > Integrations and ensure TrustId has been enabled. Then go to a Staff member's profile and select Documents in the actions bar > Employment eligibility. Here, they will now be able to upload a document via TrustId.

- **Close position automatically once threshold is hit**

Added the ability to automatically close a position when a certain number of applicants have been received. You can set the number to zero to disable.

To use: Recruitment > Manage Positions and Create a new position. Under the applications tab, you can set the maximum number of applications.

- **New scheduling day options for repeating schedules**

New repeat options for the schedule tool include repeating shifts from Monday through Thursday. You can

also choose the weekday option or the weekdays plus Saturdays option. This update provides more options and combinations for scheduling that might suit your needs.

To use: Go to Shifts > Schedule Creation > Manage Schedule. To see these options, go to the repeat options.

- **Prioritise Wednesdays and Saturdays in scheduling**

The schedule tool now allows you to assign shifts with a priority for Wednesdays and Saturdays. Our previous updates allowed you to prioritise commonly busy periods, which, depending on your company, might be weekends or weekdays. We have now added the option to prioritise Wednesdays and Saturdays first.

To use: Go to Shifts > Schedule Creation > Manage Schedule. Go to preview shifts. Under your options, in the 'Assign shifts in order of' drop-down, you can now choose to prioritise Wednesdays and Saturdays.

- **Print schedule no longer shows empty venues**

The system only prints out venues with shifts when you print a schedule. This mainly applies when printing a schedule for a venue group or all venues.

To use: Go to Shifts > Manage Shift Schedule. Then print off your schedule, and it will automatically hide any empty venues.

- **Disable Profile Photos**

Now, you can disable all profile photos for staff members if you prefer this option.

To use: Go to Global Settings > Features. You can now select to either disable or enable staff photos.

- **Restore and Archive in the Account history report**

When viewing a staff member's account history, updates where a staff member has been archived or their account has been restored are now included in the account history (in addition to the system log). This will also fall under the account details category when searching your account history.

To use: Go to a staff member's profile, under the reports option in the action bar, select account history to view changes.

- **Added special manipulation options**

New features have been added to the manipulation rules to reduce hours. This includes an added x1.333 manipulation rule.

To use: Go to Pay > Contracts > Manipulation rules. Create a manipulation rule and under the multiply hours option, at the end of the list, (under additional options) select the X1.333 option.

- **Momentum Elite integration supports event or function IDs as cost codes**

You can now import event or function IDs as cost codes with the Momentum integration.

To use: Go to System > Configuration > Global Settings > Integrations. Under the Momentum integration tab, under cost codes, choose to sync from function or event ID.

- **View API credentials**

The ability to see API credentials on an account is now a dedicated permission that can be given to access levels. This permission allows staff to view, edit and remove API Credentials for an account.

To use: Go to System > Levels & Permissions > Manage Permissions and enable the 'View, edit and remove

API Credentials' permission.

- **New custom report type: Shift Event**

There is a new Custom Report type which will display shift event information. This includes the following columns: the Event (Artifax Event ID), the date and the venue. This is useful as managers can see which events are each day within a venue.

To use: Go to Reports > Manage Custom Reports > Create a new report. The new option is under report options.

- **Sort deployment patterns by name**

A new ability to sort shift deployments using the pattern name allows you to group similar patterns. For example, First Floor 1, First Floor 2, and First Floor 3 would all be next to each other. Remember, this works for the deployment pattern title, not the position title.

To use: Go to Shifts > Manage deployments > Shift deployments. Under Sort by, select by pattern title.

- **Tracking for Indeed applications**

Additional source and detail tracking for applications delivered automatically from Indeed. The Indeed tracking notes include how the applicant found the job when you view an application. They will also include information like sponsorship or searches. When setting up a position, in the Indeed section of the position details, there is also a new option: the job type. Select whether the position is Part-time, casual, Freelance, or Full-Time.

To use: This will automatically apply to Indeed applications. For detailed tracking, go to Recruitment > Manage Positions > View Applications. This information will only appear for roles that were used via Indeed.

- **Auto-approve holiday**

The system can now auto-approve holiday requests per contract type if no automatic blocks or warnings are shown.

To use: Go to Pay > Manage Contracts > Edit Contract > go to the holiday tab, and select the auto approve option.

- **Holiday blocks and warnings**

There is now a warning or automatic block option when staff request a holiday if it negatively affects staffing numbers. If enabled, the system will warn managers (or block the holiday automatically) when a request has been made, if it will negatively impact ratios. You can choose whether this restriction just triggers a warning or prevents the holiday from being allowed completely. This can be enabled under the option called Ratio Checking, which will check to see if a request will affect a venue's ratio if a shift is cancelled.

This feature is used with ratios. For example, if you have set up a ratio that requires three managers on each delivery shift, a warning will then appear if the number of managers falls below two. Therefore, we need that many managers available to schedule. If the staff member requesting the holiday was a manager and only two managers were left to be scheduled, the manager's holiday might be blocked.

To use: To enable this setting, go to Pay > Contracts > Manage Contracts > edit the Contract you are interested in. Under the Holiday tab, go to the Warnings and Request Blocking section. There is a new option called Ratio Checking. To create a staffing ratio, go to manage Venues and select the More button

next to your chosen venue. Select the Manage ratios button and make a ratio.

- **Data Sets can only be accessed by the relevant staff member**

You can now set access to a data set so that it can only be viewed by the staff member to whom it applies. Previously, you needed the data set to be viewable by another staff type.

To use: Go System > Staff Data & Processes > Data Sets & Fields. Either create a new Field Set or, if you have already made the dataset, click to edit the details. In the 'Access to the data' field, first, enable the 'Permission for the subject to view this data'. Then, under permission to view and edit, untick 'Access to anyone with permission to view private employee details (including the employee themselves)' and leave all boxes blank. In the edit option, tick Employee if you want the staff member to be able to access the data set.

- **Ability to view historical contracts' holiday reports**

You can now view historical contract reports. This will only apply to previous contracts if the contract had a holiday entitlement enabled. Additionally, the staff member or manager wishing to view it must have had permission to approve the holiday for their access to this report. This report is helpful for staff who have changed jobs, if, as a manager, you want to see what holiday they had for a previous contract.

To use: Go to a staff member's profile. In the actions bar, go to Edit Details > Manage Contracts. Then, under previous contracts, you will see a view holiday report button.

- **Display absences on contract reports**

When time entries are connected to shifts, absences, and holidays, they will now appear on contract reports. If the time entry is marked as a holiday or absence, it will show that in an orange bubble in your contract report and can also indicate the type of absence or holiday it is.

To use: Go to Pay > Contracts > Contract hours report. View by either period or contract and select the staff member you want to view. Any absences will then come up automatically. No changes need to be made.

- **Staff must confirm details**

New invites will now ask all staff members to confirm their details and data. Previously, when inviting staff to the system, if staff were given instant access they would need to confirm their details upon logging in for the first time. However, if they were not given access immediately and were added later they would not need to.

This update has rectified this, so all new staff must confirm their details upon their first login.

- **Update contract expiry dates at the same time as the leaving date**

You can now choose to update related contract expiry dates at the same time as updating the leaving date.

To use: Go to Profile > Employment Details. In the employment dates box, under the leaving date, there should be a Contract date option. This will only appear if a contract is in place, and the leaving date has been altered at least once.

- **Run a TOIL report from before a reset date**

You can now run a TOIL history report and view information from before a reset date. You can see all TOIL requests from within the selected date range. By default, there is a limit to how far TOIL can go back, but this option allows you to ignore this date and go further back if selected.

To use: Go to a staff member's profile. Select the Reports tab in the actions bar and select the TOIL History

report. Select the ignore reset hours in history button.

- **Contract changes will not update holiday calculations**

Contract changes will no longer automatically update all holiday calculations if you select the default save option. Choose the default save option if your change is a correction or a minor adjustment. Backdate this change and do not add new changes to the contract in history. Then you can choose from one of these three options:

- Do not recalculate holiday
- Recalculate all upcoming holiday
- Recalculate all holiday for this contract

But you can choose for it to do so:

To use: Go to Pay > Contracts > Manage Contracts and edit or create a contract. Then make any changes to your contract, and remember to save at the bottom of the page. A pop-up box will appear with more nuanced options if you select Default.

2. In Detail...

2.1. Scheduling updates

2.1.1. Template Creation

This update allows you to create schedule templates that run across multiple days and place them with a single click. The Multiple Day Template enable a template to have shifts across various days. This opens up a considerable number of options for scheduling further in advance. You can create a week's worth of shifts with a single template. With the 'Certain Staff' option, you could include named individuals. You could make a weekly rolling pattern and schedule it to roll for three months or a fourteen-day rolling pattern. The endless possibilities allow you to organise your scheduling well in advance and create precise schedules.

To use this new feature, you must enable the 'Multiple Day Template' option when creating a new template; otherwise, you will only be able to add shifts for a single day. Then you will be taken to the next page, where you typically add shifts and build up your template. You will now see a new option below the 'Add to Template' section. Once you have added a shift to your template, you will see a new first column called Day. When you select the pencil icon, you can choose whether the shifts just added will be for Day 1, Day 2, Day 3, etc. Once you have decided which day these shifts will be added, make sure also to press the save button so that your template will save and reorganise.

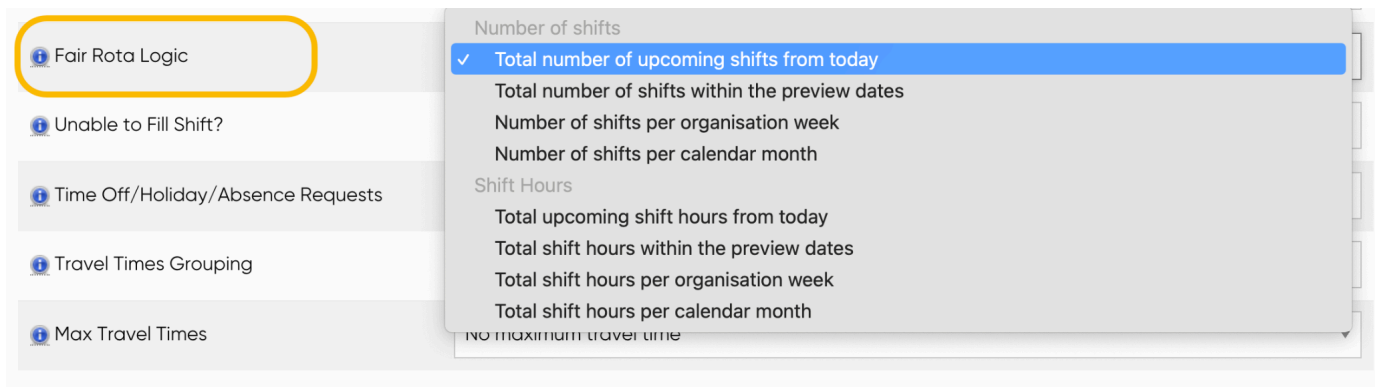
Day	Staff Member / Fill From Skill	Shift Skill	Start	End	Task	Deployments	D.S	Split	Fill Method		
Day 1	4 x Bar Crew	Bar	3:00pm	10:00pm					Equal Shift Spread		☐
Day 1	2 x Bar Crew	Bar	3:00pm	10:00pm					Equal Shift Spread		☐
Day 1	2 x Cloakroom	Cloakroom	3:00pm	10:00pm					Equal Shift Spread		☐
Day 1	2 x Duty Managers Door	DM Door	3:00pm	10:00pm					Equal Shift Spread		☐
Day 2	2 x Cloakroom	Cloakroom	3:00pm	10:00pm					Equal Shift Spread		☐
✓ Day 1 Day 2 Day 3 Day 4 Day 5 Day 6 Day 7	2 x Duty Managers Door	DM Door	3:00pm	10:00pm					Equal Shift Spread		☐
Edit Selected Rows											
Start time						☒ Don't change					
End time						☒ Don't change					

This new option is helpful with a fixed template structure and schedule. It also allows you to build a whole week of shifts on the same page. You can see all the shifts you add and have direct control over what is added to the template. It helps if you don't want to move things around in your schedule.

As it is a bigger schedule, it requires more organisation. Our other templates were designed to be repeated or used in tandem with other templates. With this template, you can create a template for several days at a time, all the way up to 100 days.

2.1.2. Fair logic option

Once you have created your templates, added them to the schedule, and are ready to publish, a new option now affects how shifts are assigned.



You will find that there is now the ability to change how the system calculates a fair rota when bulk scheduling. This new function dictates what data the system will use to decide how to fairly assign shifts (such as when you are using the assign equal shifts method). The options include drawing from the number of shifts in the system (You can look at the shifts for that month, that week all upcoming shifts or only shifts selected within the preview dates), or to process via number of hours (Hours options include; hours from that day, the week, the month, or all hours within the preview dates).

2.1.3. Publishing Shifts

This update offers a new, more flexible release shift schedule. This can all be found under Manage Schedule in your publishing shift notification options. The system now allows different skills and unassigned shift options, and enables managers to view and cancel upcoming schedules. When you are about to notify staff members about upcoming shifts, you will see two new options. Under the limit Skills option, you can set it so that only some Skills will receive notifications. This is helpful if you have organised your scheduling for a specific Skill, such as front of house, but still need to arrange your management shifts and want to give your front of house staff plenty of notice.

Publish Shifts & Notify Staff

Un-hide Shifts?

Make any hidden shifts visible (publish them!)

Venues

☐ ArtifaxEvent Example
☐ Coffee Hut
☐ Historic Gallery
☐ Hotel
☐ Momentus Elite
☐ Momentus Enterprise
☐ Museum
☐ Office
☐ Residential Care
☐ Royal Theatre
☐ Shop
☒ Venue Uno
☐ Yesplan Example

Limit Skills:

☐ All skills

Choose Skills

☒ Bar Crew
☒ Bar Training
☒ Cloakroom
☐ DM Training
☐ Duty Managers Bar
☐ Duty Managers Door
☐ Engine Room Cafe Crew
☐ First Aid
☒ Hospitality
☐ Human Resources Team
☐ Merch Seller
☐ New Staff
☐ Production Managers
☐ Promotional Crew
☐ Security
☐ Sound Engineer
☐ Technical Setup Crew
☐ Theme Crew
☐ Training Development
☒ Venue Manager

Include Unassigned Shifts:

☒ Extra shifts
☒ Offered shifts
☒ Unassigned shifts

You can also now publish and notify staff about unassigned, extra, and offered shifts. This means that staff are informed about any extra shifts they can offer to work.

It will also unhide any assigned shifts in bulk, so managers don't need to manually unhide shifts, and staff will receive a notification. If you include unassigned shifts here, they will be unhidden, making them ready for managers to quickly assign instead of having to manually unhide any shifts.

The unhide feature makes it easier for managers to schedule their shifts, hide them, and then unhide in bulk when ready to release. If there are any last-minute changes to make, you can even check availability up to an hour before shifts to determine who can work and who cannot. This means you don't need to inform staff of any shift changes until you are ready. This is particularly effective when working with multiple shifts, as it enables managers to plan their schedules effectively. For example, when managers release 300 shifts, the system has already completed the previous work, allowing it to display the information much faster. This is especially useful for larger clients where many shifts must be processed simultaneously.

The system will also inform you how many shifts are awaiting notifications to be sent out.

2.1.4. Overnight templates

Quick Shift Templates now include an option that allows the template to run across the following day. This allows for multiple shifts that run overnight. It also makes things really clear for the system. Say you are doing a 24-hour shift; if you were using a split shift, the system might get confused over the order of shifts. However, with our following day option, you can make it clear which order your shifts will go in.

To use this, first add the first part of your shift. Then add a secondary shift and select the following day option. An example of this for a 24-hour overnight shift might be 11pm - 8am and then the second shift is 8am - 11pm, with the second shift using the following day tick box. You will also want to select the linked shift option so the same staff member works all shifts.

For Venue Uno

Title

Overnight Shift

Linked Shifts?

Linked shifts must always be worked by the same staff member

Yes: link these shifts so the same staff member always works all of them

Shifts in template

Start	End	Skill	Task	Following day?	
23:00	08:00	Staff Member's default	No Task	☐ Following day	DELETE
08:00	23:00	Staff Member's default	No Task	☒ Following day	DELETE
ADD A SHIFT					

SAVE DETAILS

StaffSavvy™

Adding this as a template can be really helpful, like a split shift. Once it is in your templates, you can quickly add this with one click for an overnight shift (if you are not using the pay item option).

2.1.5. Assigning shifts to individual staff

Our final update for our scheduling system is that you can now choose how shifts are assigned to individual staff members. If enabled, you must then dictate how shifts can be assigned per Skill, per account.

This means that managers will be able to choose exactly how shifts can be assigned to each staff member, down to each Skill. So, how would this look?

For example, once set up, a manager might configure it so that for the staff member's default bartender skill, they can be automatically added to shifts, but their Bar supervisor Skill can only be scheduled by a manager and cannot be assigned by automatic templates. This can be helpful as well if there are specific Skills that you don't want shift swapping to occur for.

Edit Staff Member Skills

Abigail "abi" Watson

Skill	Member of Skill?	Default Skill?	Pay Element	Receive Shifts via
None		☐		
Bar Crew	☐	☐	Default Skill Pay Element	Not Automatic Rota
Bar Training	☐	☐	Default Skill Pay Element	Not Automatic Rota

To set this option up, first, you must enable the option 'Control how shifts are assigned per Skill' in Global Settings. Then, change the options for each staff member by navigating to their profile and selecting 'Edit Assignments > Edit Skills' from the actions bar. Under the 'Receive Shifts via', you can choose for each Skill whether this Skill can

be assigned via any method (including automatically assigned using templates, extra shifts and shift swapping), not automatically assigned (but any other assignment option), or only manually assigned.

2.2. SCIM

This update includes new support for automatic account provisioning via SCIM.

To enable this, you must first go to the SSO & SCIM tab (formerly named SSO) in Global Settings. Under this tab, after deciding whether to disable email login and enable SSO, a new option called SCIM can be enabled.

SCIM stands for System for Cross-Domain Identity Management. It helps create a single centralised system for updating user information across different platforms (including Microsoft Entra and others).

Enabling SCIM allows you to transfer and synchronise data across platforms already using SCIM. Once a user account has been created and the central identity has this information, if SCIM is enabled, this information will be synchronised with all other applications where SCIM has been enabled. This information will also apply if the user updates their information. One of the most useful features that comes from enabling SCIM is that it can automatically archive accounts where a work email account has also been deleted, restricting past staff members' access to the system. SCIM can also:

- Create - add new users to one platform to synchronise across multiple platforms.
- Read - search through information from the existing accounts.
- Update - synchronise new information across apps.
- Delete - deprovision a profile.

It is also helpful for larger companies, where more users require different profiles created across multiple platforms.

2.2.1. SCIM vs SSO vs SAML

SCIM and SSO have two different functions within security and data storing that play slightly different roles in managing identities and access to your applications. SCIM helps sync identities across various applications, and SSO authenticates users in multiple applications with a single set of credentials. These two technologies can be used together to create a secure experience.

SCIM and SAML are features that streamline the exchange of identity data and can be used together or separately. Like SCIM, SAML allows users to reuse the same credentials across different platforms. SCIM can work well with SAML as it functions by creating, updating, or deleting profiles in the target system, providing key information for the user to sign in to an app.

2.2.2. Setting up SCIM options

Now that we have explained SCIM and its potential uses, we will briefly discuss setting it up. First, you will need to enable SCIM. You will see that your SCIM root and schema endpoints are automatically set up so that you can use them for your integration.

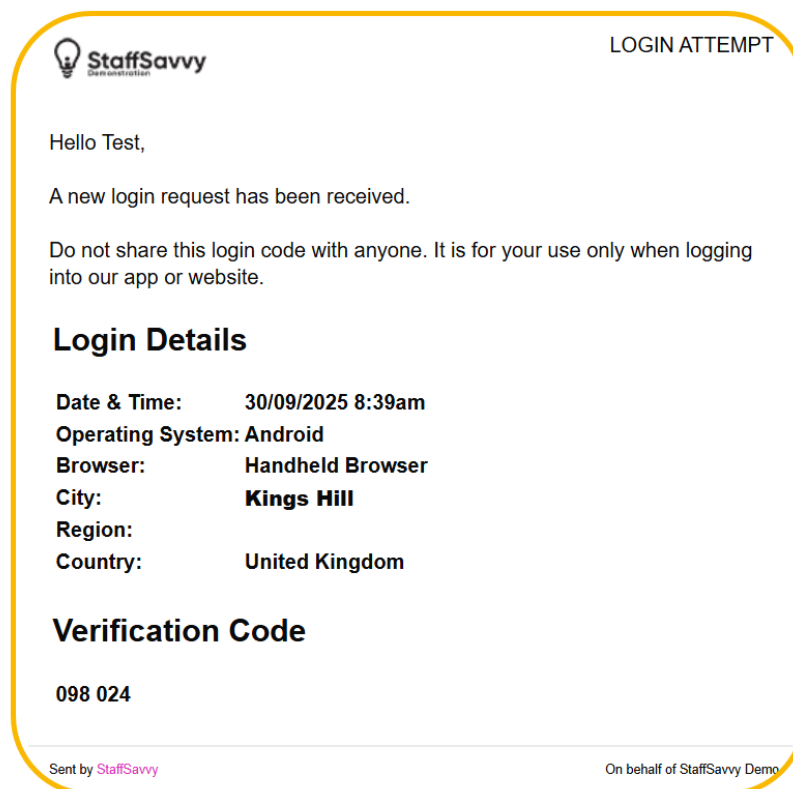
You also have a token. Then set your default Venue, Skill and Access Level.

2.3. Email MFA

We now require email-based Multi-Factor Authentication for all accounts not using SSO or device-based MFA. This ensures the system provides a high level of encryption and security.

2.3.1. Verification

When staff members attempt to log in, all users will receive an email (to the email address associated with their StaffSavvy account) with a login verification code. The message will also provide information about the time and approximate location of the login attempt so staff can easily identify if it was them or someone else.



They can then input the verification code into the login screen on StaffSavvy. Once logged in, they will have the option to save this login for 30 days. After this period, they must log in again using the code. For more security, staff can continue to require a verification code for each login.

2.4. Pay for Training

You can now choose to pay staff to complete exams, courses, and modules automatically within the system. This is useful if you have training in the system that will take several hours to complete, and is required before they can take part in the job, and you want to pay your staff for the time spent completing their training. Training must be paid in some circumstances (such as if staff are working at the national minimum wage) to ensure pay does not go below the minimum. When you have set up your training modules within the system, StaffSavvy can calculate the

time spent on each training course or exam.

To set this up, you will need to create a new module and enable time entries. This feature will only work if automatic time entries are enabled, as the system uses this information to calculate time spent and appropriate costs.

2.4.1. Settings

Once enabled, you must consider how much you want staff to be paid for training and whether there will be any restrictions on this.

Time Entries

Automatically Add a Time Entry?

☐ Do not add time entries

☒ Automatically add time entries

Minimum duration of time entry

Pay exactly time spent on Exam or scheduled duration of course

Maximum duration of time entry

No maximum length

Pay for failed Exam attempts?

Pay for a maximum of 1 failures

Skill

Staff Member's default skill

Pay Element

Staff Member's pay element from skill

Automatically approve the time entry?

☒ Add unapproved time entries

☐ Automatically approve the time entries

Minimum duration of time entry

The minimum duration covers the least time a staff member is paid for an exam. If you choose to pay exactly for the time spent on the course, you will pay a staff member exactly how long it took to take it (even if they completed it relatively quickly). If you have set up a scheduled duration for the course, they will be paid for how long the expected duration was. You could pay them a minimum of one hour of pay, even if they took less time than that.

Maximum duration of time entry

The maximum duration is the longest time to complete the exam before the pay is frozen. Any time longer than this, they will be paid the maximum duration amount.

For example, you might expect a staff member to complete a short exam in 2 hours, but you will pay them up to a maximum of 3 hours. This allows you to provide staff a certain amount of time to look at the slides and do the exam, with some extra time to take into account if they are having difficulty with the material, but also having a maximum time so that you aren't paying them when they severely exceed expectations of how long the exam should approximately take to complete.

Failed Attempts

You also have the option to dictate whether staff are paid after multiple failures. If a staff member has failed, how

many of their secondary attempts will be paid? You can choose not to pay at all after a failure or to pay up to 25 failure attempts.

Other Settings

You must also select the Skill at which this module will be paid, which will most likely be their default Skill if it is a general module or a Skill related to the training. For example, if the exam is for Bar Skills 101, the Skill might be Bartender. You will also need to choose the relevant pay element here as well, and whether the time entries created for training need to be approved or not.

The settings for time entries and payment for Modules apply exactly the same way for Exams.

If you have any feedback, future suggestions, or need additional help, please contact us directly at support@staffsavvy.com