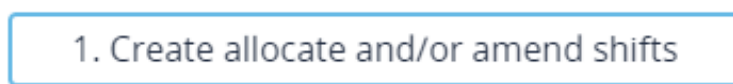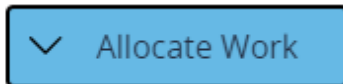# University of Essex

Essex Hours

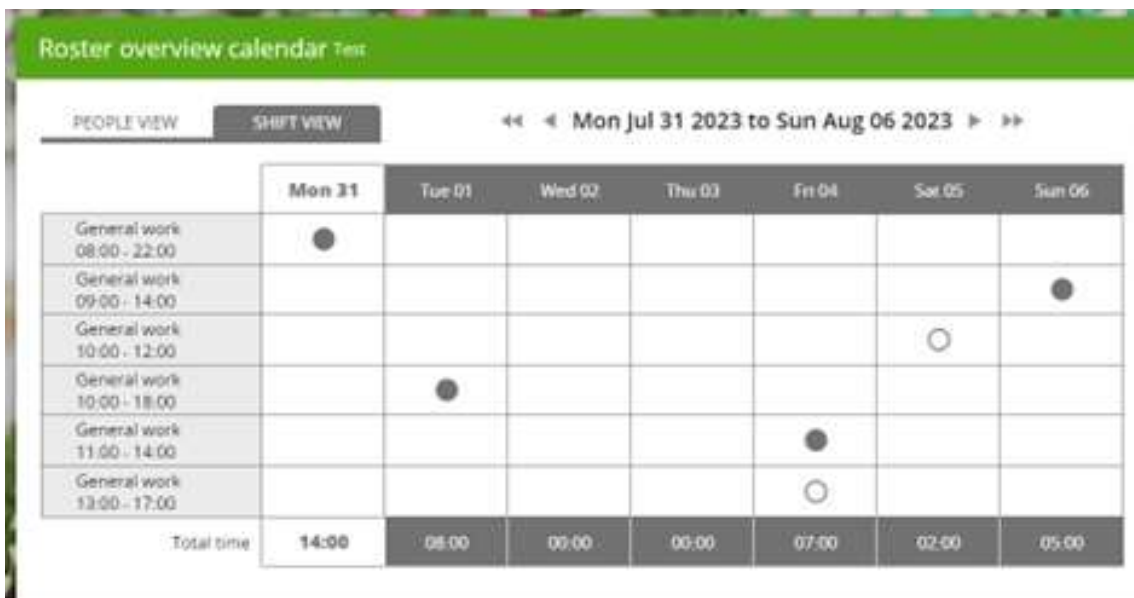## Quick Guide:
Managing Schedules – Flexible Scheduling

Stage 1: Adding a flexible shift

1. Log into your 'Essex Hours Administrator' role in iTrent and select 'Work Scheduling' from the panel on the right-hand side.

2. Click link "1. Create allocate and/or amend shifts" under the 'Allocate Work' folder.

3. When prompted, search for the name of your project. If you don't know the name, put your cursor in the search box and press enter on your keyboard to run a blank search and return all results.

4. Search for your roster. If you don't know the name, put your cursor in the search box and press enter on your keyboard which will run a blank search and return all results. Select the roster.

5. This will open the roster overview calendar under the 'Shift View' tab.

6. To create shifts on the roster, click the add shift button, and enter the start date and end date of the period work will be undertaken. NOTE: the dates cannot straddle a roster week. If the work does straddle a week another shift will need to be created on the next weeks roster.

7. Next enter the total number of hours to be allocated for that period. If you wish to create multiple shifts of with these attributes tick multiple shifts box and enter the quantity required. If only one shift required allocate the employee to that shift and save.

   See screenshot below.

Shift Details - New

Start date *	05/06/2024
Tasks *	CSEE Marking Flex Draw Dow ⌄
End date *	08/06/2024
Number of hours *	5
Create multiple shifts	☑
Quantity	3

— Task details

Default unpaid time	
Record breaks	☐
Use task recurrence pattern	☐
Recurrence pattern	None ⌄

+ Costing details

+ Notes

8. Once you have saved your shift you may need to click the refresh button on the roster overview screen for the shifts to be visible. (there is currently a known display issue which will be resolved in future release which will negate the need to refresh)

Roster overview calendar ACAD - SiT - 1010   ⌄ MENU ⟳ 🖨 📎

PEOPLE VIEW | SHIFT VIEW   ◄◄ ◄ Mon Aug 12 2024 to Sun Aug 18 2024 ► ►►   ▼ (0)

	Mon 12	Tue 13	Wed 14	Thu 15	Fri 16	Sat 17	Sun 18
SiT - Student Services Assi... Flexible shift	● x 3						
Total cost	4351.78	0.00	0.00	0.00	0.00	0.00	0.00
Total time	92:00	00:00	00:00	00:00	00:00	00:00	00:00

NOTE: Flexible Tasks need to be set up to before you can create and allocate shifts on the roster. Request these via cahelp@essex.ac.uk

Flexible scheduling tasks will be set up to include a 'Flex' suffix to denote a flexible draw down will be available for the hours entered.