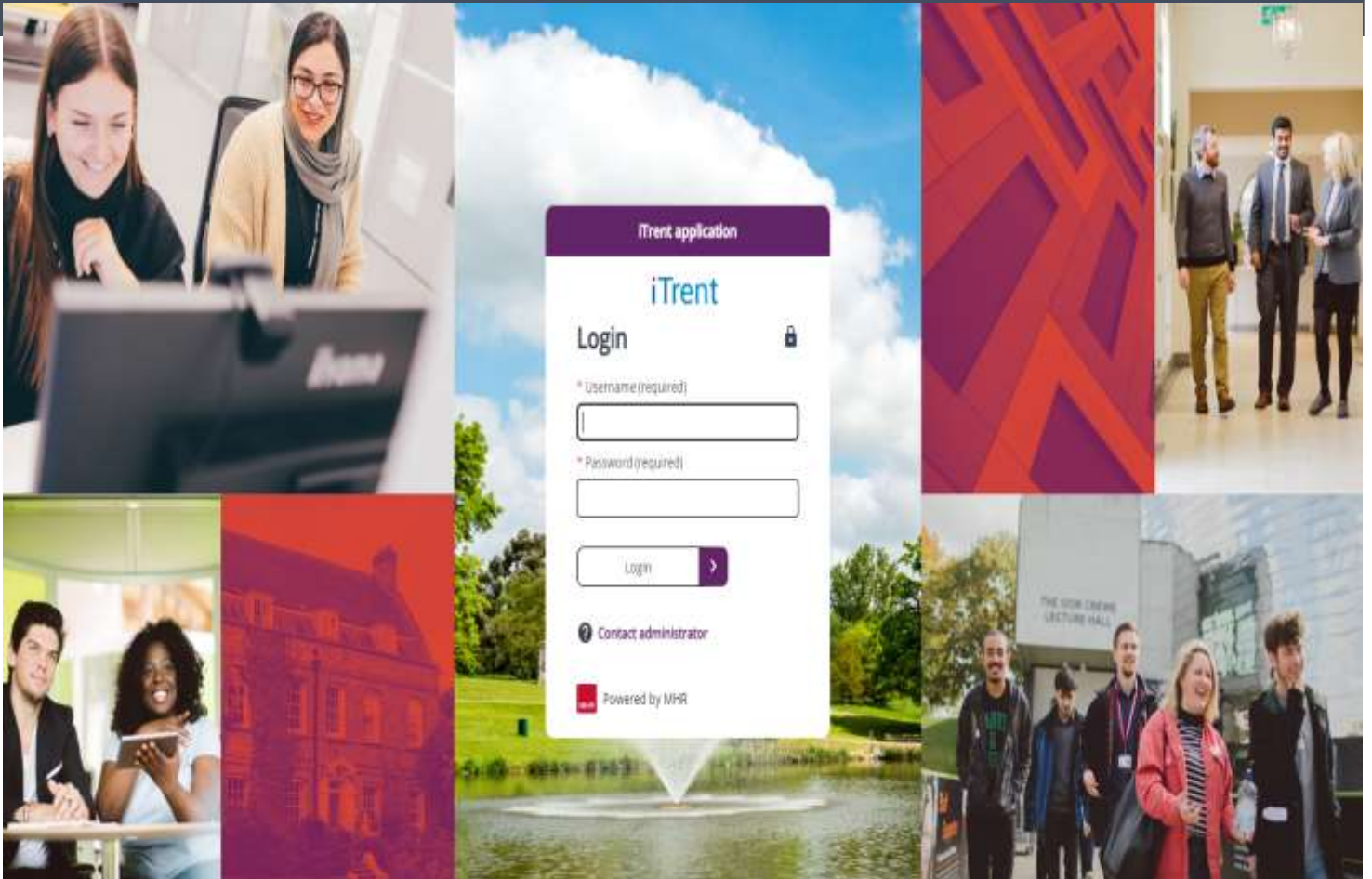




University of Essex

Essex Hours

Managing Schedules – Centralised Submissions



Stage 1: Allocating & Adding Shifts

1. Login to your Essex Hours Administrator role and select 'Work Scheduling'.
2. Do a blank search to return the available projects (positions/ shifts/ roles) and select the relevant one.
3. Select 'Allocate/Update Shifts' link for allocating or updating shifts and check constraints (i.e. holiday, sickness, visa restrictions, working elsewhere) Next select 1. Create allocate and/or amend shifts.



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

Roster overview calendar Test

PEOPLE VIEW SHIFT VIEW << Mon Jul 31 2023 to Sun Aug 06 2023 >>

	Mon 31	Tue 01	Wed 02	Thu 03	Fri 04	Sat 05	Sun 06
General work 08:00 - 22:00	●						
General work 09:00 - 14:00							●
General work 10:00 - 12:00						○	
General work 10:00 - 18:00		●					
General work 11:00 - 14:00					●		
General work 13:00 - 17:00					○		
Total time	14:00	08:00	00:00	00:00	07:00	02:00	05:00

5. To allocate a shift to a member of the team click on an empty shift (unfilled dot) and select a name from the person list and click save

Start date (required): 31/07/2023

Start time (required): 09:00

End date (required): 31/07/2023

End time (required): 12:00

Create multiple shifts

Show available staff only

Workforce pool name: Test Workforce Pool

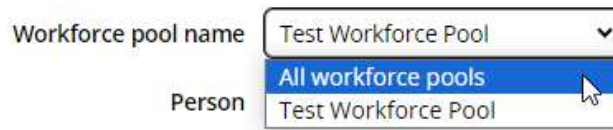
Person: [Dropdown]

Allocation authorisation: [List of staff members]

Click in code: [List of codes]

on

6. Some rosters will have multiple 'Workforce pools' applied, this could be by role type or for academic departments this may be split by module number. Check you have selected the correct pool from the dropdown before searching for a name.



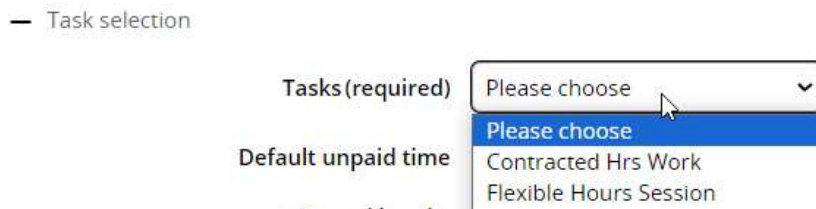
The screenshot shows two dropdown menus. The first is labeled 'Workforce pool name' and has 'Test Workforce Pool' selected. The second is labeled 'Person' and has 'All workforce pools' selected, with a mouse cursor hovering over it.

7. To add a new shift, click the 'Add Shift' button



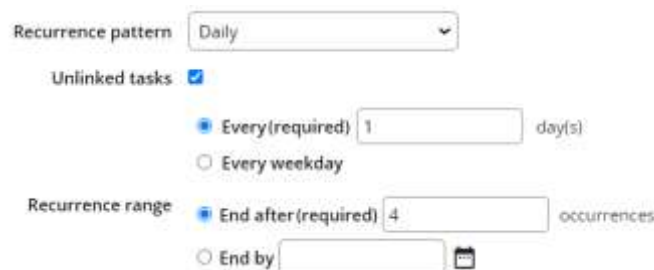
The screenshot shows two buttons: 'View constraints (0)' and 'Add Shift'.

8. Enter the start date, start time, end date and end time. You can also allocate the person by selecting them from the list. Finally, select the type of shift/ task from the drop down and click save.



The screenshot shows a section titled 'Task selection'. It contains two dropdown menus: 'Tasks (required)' with 'Please choose' selected, and 'Default unpaid time' with 'Contracted Hrs Work' selected. A mouse cursor is hovering over the 'Please choose' option in the first dropdown.

9. If you would like the same shift to appear on multiple days, you can choose an option from the recurrence pattern drop down. For example, if you would like the same shift to occur every day Mon-Fri, enter the shift details as above for the Monday, select 'Daily' as the recurrence pattern, ever 1 days and the range as end after 4 occurrences. This will create the remaining 4 shifts in addition to the Monday one when you save



The screenshot shows the recurrence settings for a shift. The 'Recurrence pattern' dropdown is set to 'Daily'. The 'Unlinked tasks' checkbox is checked. Under 'Recurrence range', the 'Every (required)' option is selected with a value of 1 day(s). The 'End after (required)' option is also selected with a value of 4 occurrences.

10. You can also bulk allocate shifts by clicking link 1a. Bulk allocate shifts by task. On this screen choose 'Select by task' then select your task from the dropdown and click search.

Select by

Task

Workforce pool name

Start date Start time End date End time

11. Select a person from the dropdown for each shift. You can also update their unpaid/ break time if needed.

Start date	Start time	End date	End time	Default unpaid time	Person	Unpaid time
Mon 05/02/2024	07:00	05/02/2024	15:00	00:30	<input type="text"/>	<input type="text" value="00:30"/>
Mon 05/02/2024	07:00	05/02/2024	15:00	00:30	<input type="text"/>	<input type="text" value="00:30"/>
Mon 05/02/2024	16:00	05/02/2024	23:00	00:30	<input type="text"/>	<input type="text" value="00:30"/>

12. When you have allocated shifts, click save and then select the 'create allocate amend shifts link' to return to the roster overview screen to run the constraints process.

13. Click the validate roster button at the bottom of the page. This will check for any absences or working restrictions that effect the current roster and indicate these by highlighting the shift with an orange '!' symbol.

14. You can also view further details about who is affected by the constraint and why by selecting the 'People view' tab and clicking on any names with the orange '!' symbol against them. To view details about the constraints, click 'view constraints' at the bottom of the roster. Full details of what each constraint message means and action to be taken can be seen in the table below.

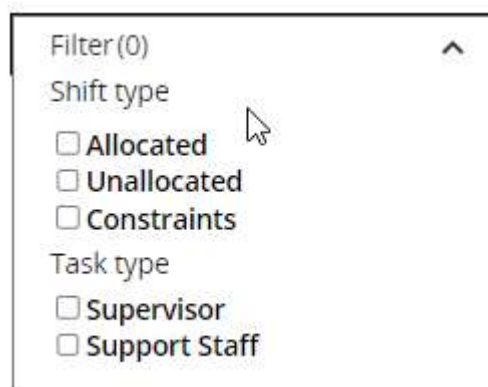
PEOPLE VIEW SHIFT VIEW <<

	Mon 07	Tue 08
ITSAS, Steve (40165... General work		
ITSAS, Oliver (40205... General work		
Total time	13:00	12:00

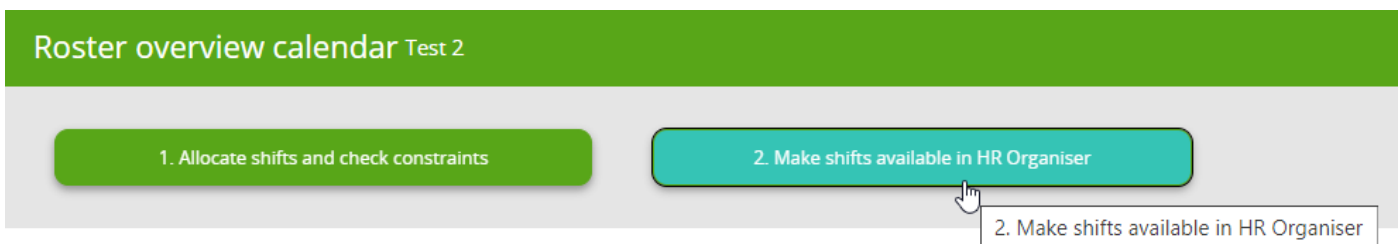
Message	Meaning	Action
---------	---------	--------

Person with overlapping work units	The individual assigned to that work schedule is also allocated to work elsewhere at the same time, this could be in the same project or another	View their record under the people view tab and remove scheduled work as needed
Position has overlapping work units	That individual is assigned to work elsewhere in the same position	View their record under the people view tab and remove scheduled work as needed
Student visa worker	They have exceeded their student visa hours restrictions for that week	Remove scheduled work to bring them back under their allowed hours of work (usually 20)
Absence	The individual is currently recorded as absent on that date and so unable to work	Re-allocate the scheduled work to someone else or if the allocated individual has returned ensure their absence record is updated.

15. You can use the filters on the Roster Overview Calendar screen to narrow down the schedules shown, this could be by status i.e. unallocated or effected by a constraint, or it could be the task type. Tick on any combination of checkboxes to update your filters.



16. Make any amendments to the shift allocation as required and then when you are happy to publish the roster to employees select Menu and then '2. Make shifts available in HR Organiser'.



17. Untick the box for 'Exclude from self-service' and then click save.

Running Reports

18. To print the work schedule, select Roster Reports. Run roster schedule report



19. When prompted search for the rosters and then select the week you wish to print. This will open a report called 'Rostering weekly schedule', the details should be populated so you can just click 'Run'.

Workforce pool name

Task type

Task

Start date (required)

End date

Output type

Report run comments

Run

20. When the report is completed, a blue bar will appear at the top of the screen letting you know it is ready for download. Select the menu button and then click the link for 'Download schedule'. Select the download button to open the report.



21. This will open as a PDF file that you can then save and print.

Stage 2: Payroll cut off and amendments after 16th of the month.

1. Any changes to sessions that occur in the current month must be reflected on the rosters by the Essex Hours Administrator by the 16th of each month.
2. On the 17th of each month payroll will draw all the hours from the rosters across into payroll, for the whole month. Eg on the 17th October, all hours allocated on rosters dated from 01/10/2024 to 31/10/2024 will be pulled into the October payroll run.
3. Should you have any amendments to make on the rosters after the 16th of the month, these updates will be picked up and reflected in the next month's payroll run.
4. On the 18th of each month Essex Hours Administrators will receive a report of all hours that have been included in the current months' payroll run.