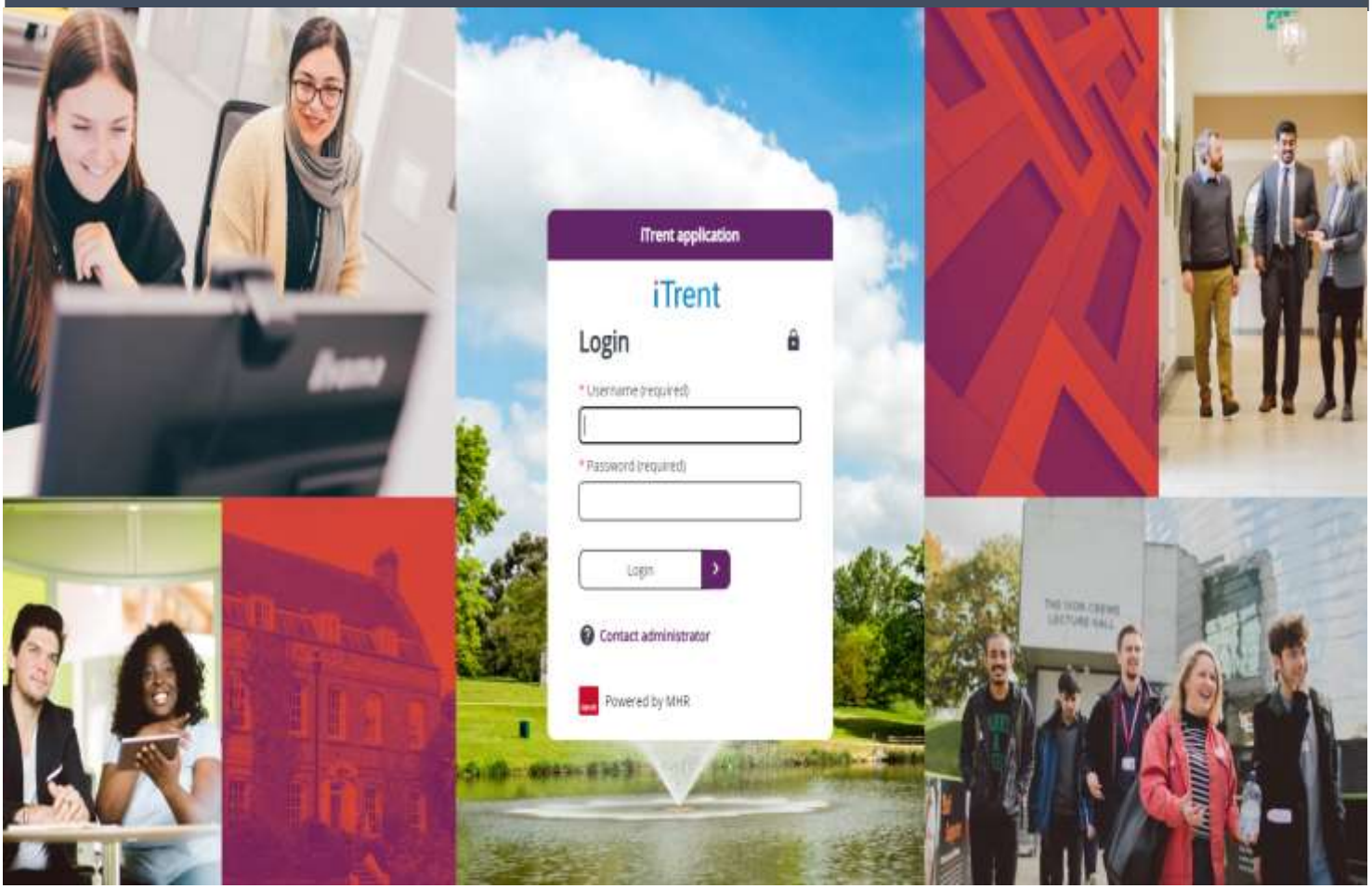
University of Essex

Essex Hours

Managing Schedules – Individual Submissions

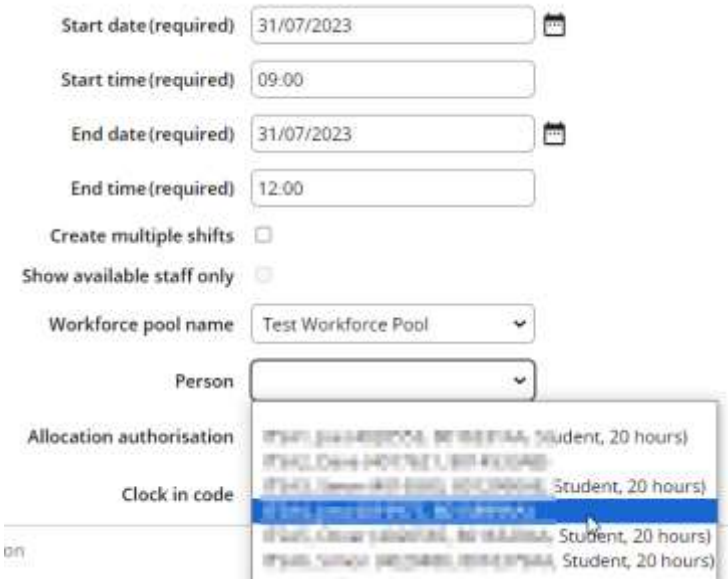


Stage 1: Allocating & Adding Shifts

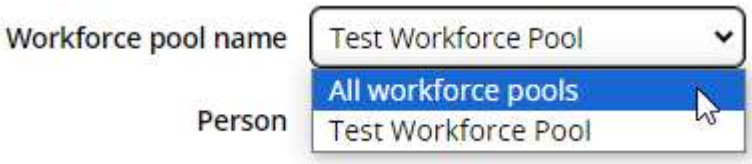
1. Login to your Essex Hours Administrator role and select ‘Work Scheduling (Rostering)’.
2. Do a blank search to return the available projects (positions/ shifts/ roles) and select the relevant one.
3. Select link 1 for allocate shifts and check constraints (i.e. holiday, sickness, visa restrictions, working elsewhere)

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

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



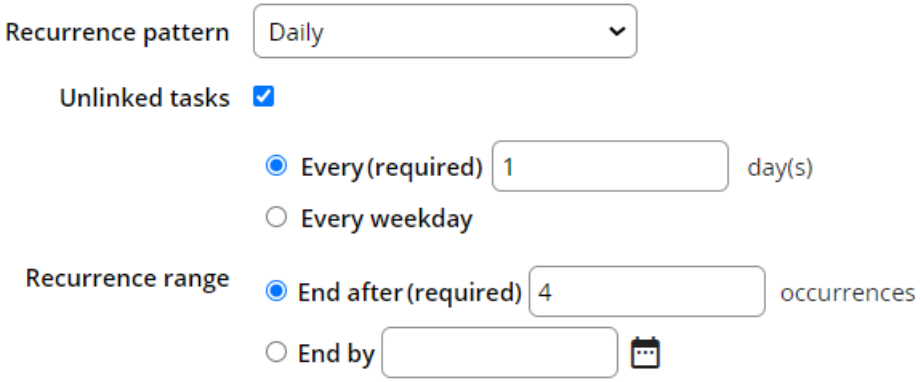
6. Some rosters will have multiple ‘Workforce pools’ applied, this could be by role type or for academic departments this may be split by module number. Check you have selected the correct pool from the dropdown before searching for a name.



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

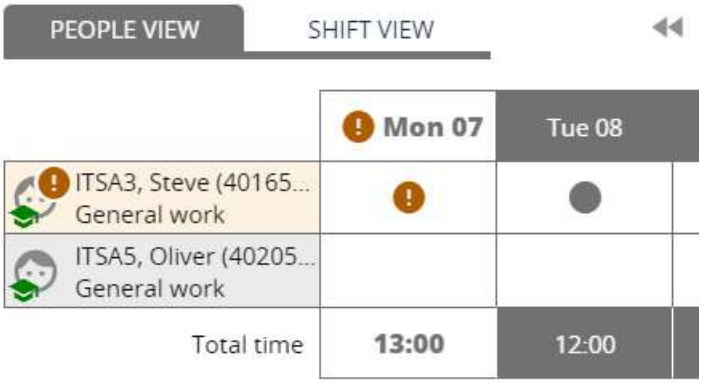
8. Enter the start date, start time, end date and end time. You can also allocate the person by selecting them from the list. Finally, select the type of shift/ task from the drop down and click save.

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



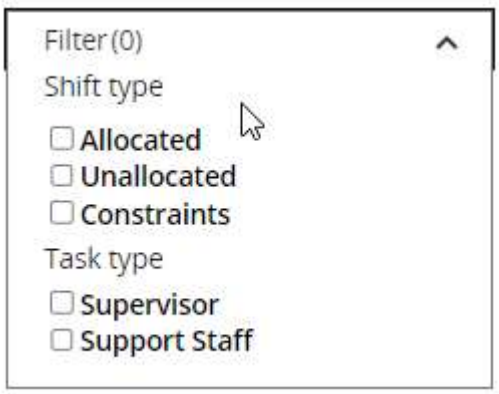
10. When you are happy with the allocated schedule, click the validate roster button at the bottom of the page. This will check for any absences or working restrictions that effect the current roster and indicate these by highlighting the shift with an orange ‘!’ symbol.

11. 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.

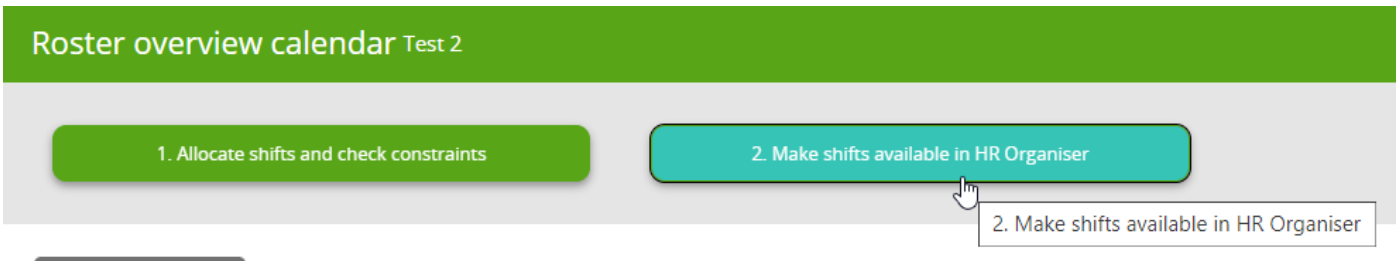


Message	Meaning	Action
Person with overlapping work units	The individual assigned to that work schedule is also allocated to work elsewhere at the same time, this could be in the same project or another	View their record under the people view tab and remove scheduled work as needed
Position has overlapping 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.

12. 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.



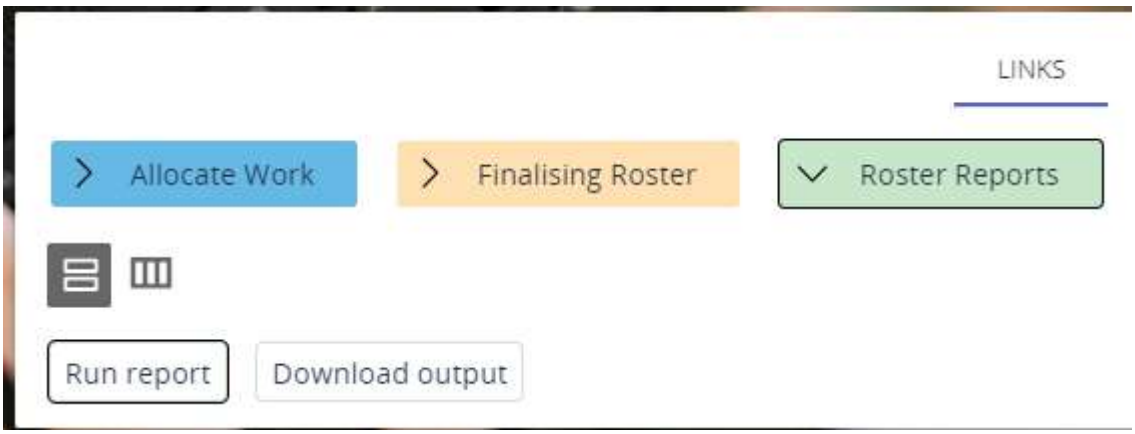
13. Make any amendments to the shift allocation as required and then when you are happy to publish the roster to employees select Menu and then ‘2. Make shifts available in HR Organiser’.



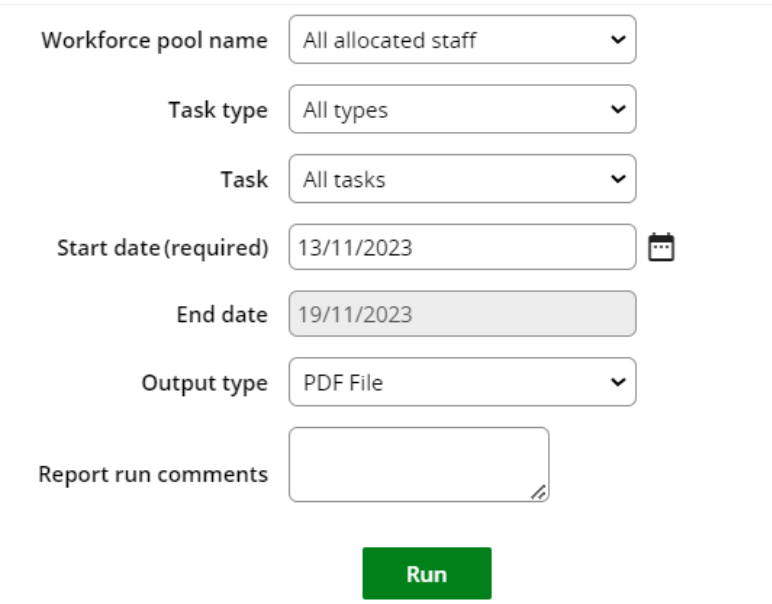
14. Untick the box for ‘Exclude from self-service’ and then click save.

Running Reports

15. To print the work schedule, from the work schedule summary page click on the folder ‘Roster Reports’ and select ‘Run report’.



16. 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’.

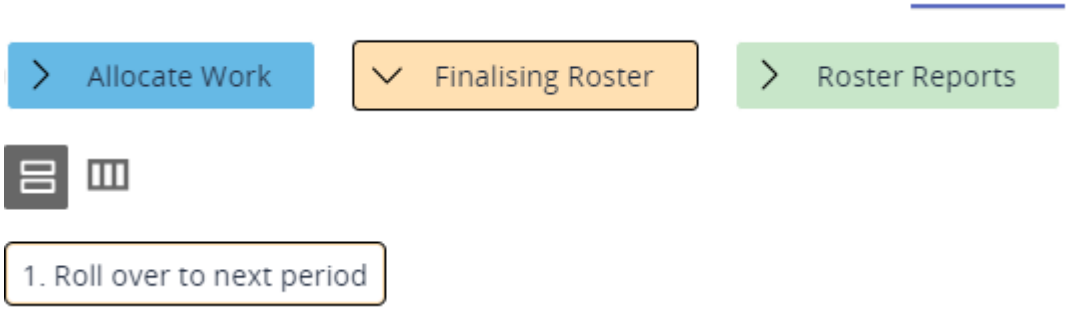


17. When the report is completed, a blue bar will appear at the top of the screen letting you know it is ready for download. Select the menu button and then click the link for ‘Download output’. Select the download button to open the report.

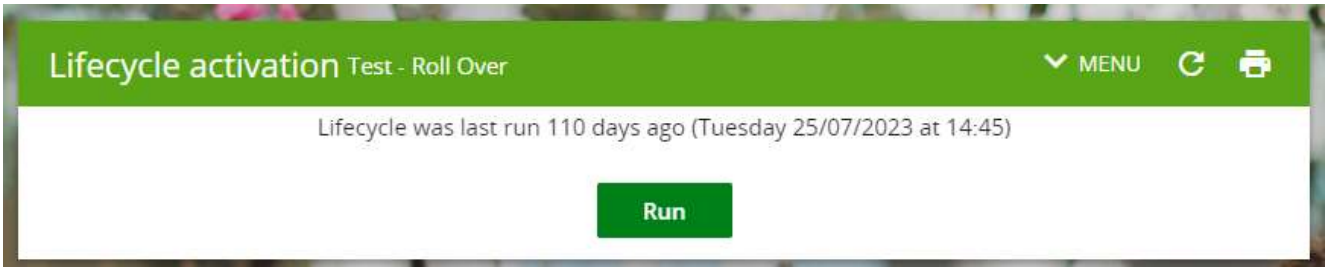
18. This will open as a PDF file that you can then save and print.

Stage 2: Finalise Roster

19. At the end of the roster period, select the folder ‘Finalising Roster’ and then ‘1. Roll over to next period’.



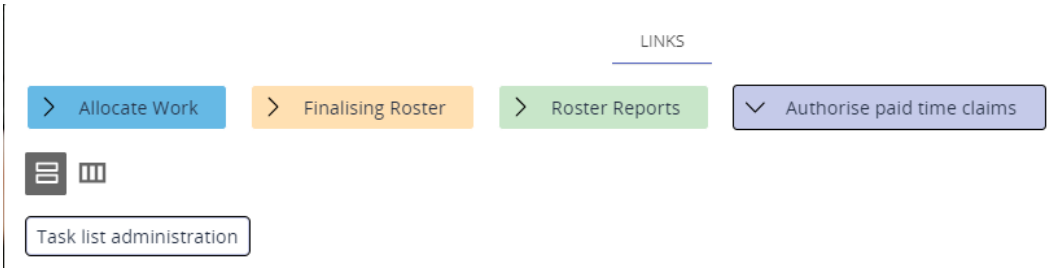
20. When prompted select the lifecycle suffixed ‘Roll Over’ and click ‘Run



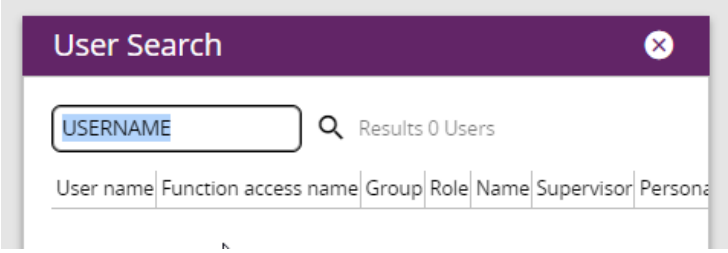
Submissions to Payroll

21. The individual will submit their hours worked via HR Organiser, which will be approved by their reporting manager.

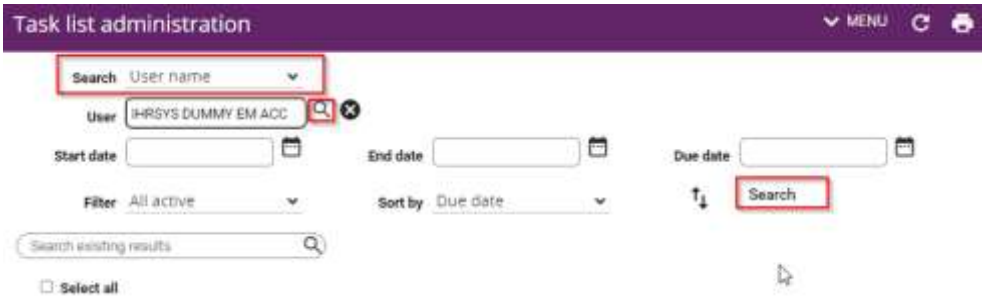
22. If the reporting manager is absent, or unable to approve the claim for any reason you can redirect this to another manager using the link on the roster summary page ‘Authorise paid time claims’ -> ‘Task list administration’.



23. In the ‘Search’ drop down, select ‘User name’ and then when the ‘User’ box appears select the magnifying glass icon. Enter the username of the individual the claim is currently with for approval



24. Select their username from the list and then click search to return a list of approval tasks currently with that user



25. Use the checkboxes at the side of each task to select those you will move for approval and then click ‘Redirect’

26. On the new screen, again click the magnifying glass and search for a person to redirect to. This time search by surname rather than username. Once the username is populated, click ‘Save’. The task will now be in their to do list and can be actioned in the normal way.