



University of Essex

Essex Hours

Managing Schedules – Centralised Pay

 iTrent

 Login

User name

Password

Login

 Contact administrator

Stage 1: Allocating & Adding Shifts

1. Login to your Essex Hours Administrator role and select '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.

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)

Start time (required)

End date (required)

End time (required)

Create multiple shifts

Show available staff only

Workforce pool name

Person

Allocation authorisation

Clock in code

on

Student, 20 hours)

Student, 20 hours)

Student, 20 hours)

Student, 20 hours)

Student, 20 hours)

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



7. 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.

— Task selection

Tasks (required)

Default unpaid time

Contracted Hrs Work

Flexible Hours Session

8. 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

Recurrence pattern

Unlinked tasks

Every (required) day(s)

Every weekday

Recurrence range End after (required) occurrences

End by

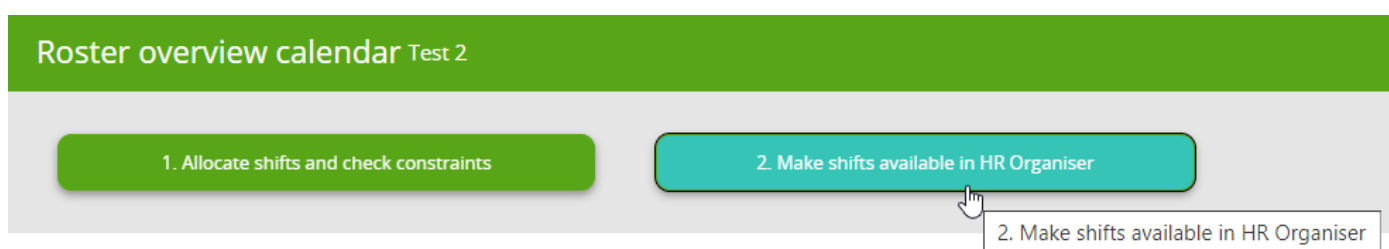
9. When you are happy with the allocated schedule, click the validate roster button at the bottom of the page. This will check for any absences or working restrictions that effect the current roster and indicate these by highlighting the shift with an orange '!' symbol.



10. 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.

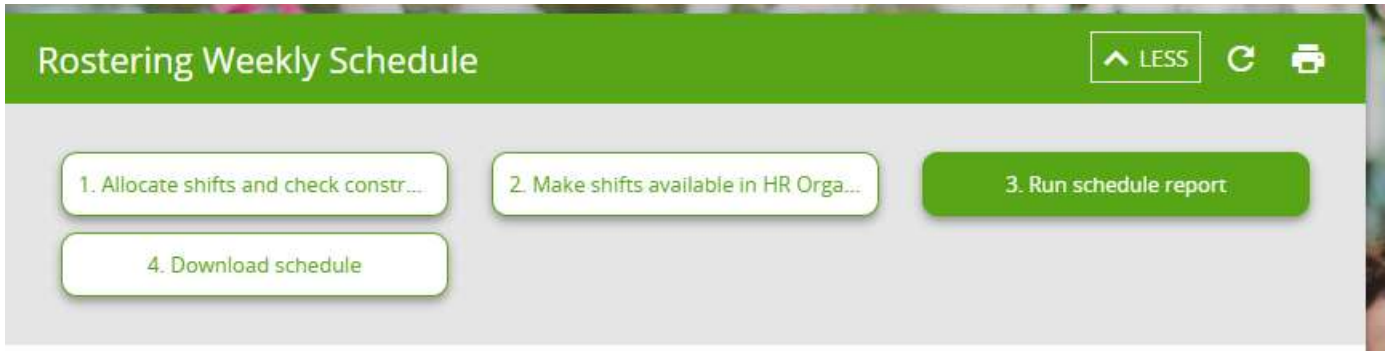
	PEOPLE VIEW	SHIFT VIEW												
		<table border="1"> <thead> <tr> <th>!</th> <th>Mon 07</th> <th>Tue 08</th> </tr> </thead> <tbody> <tr> <td> ITSA3, Steve (40165... General work </td> <td>!</td> <td>●</td> </tr> <tr> <td> ITSA5, Oliver (40205... General work </td> <td></td> <td></td> </tr> <tr> <td>Total time</td> <td>13:00</td> <td>12:00</td> </tr> </tbody> </table>	!	Mon 07	Tue 08	ITSA3, Steve (40165... General work	!	●	ITSA5, Oliver (40205... General work			Total time	13:00	12:00
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Total time	13:00	12:00												

11. 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'.



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

13. To print the roster, click on menu and then '3. Run Schedule Report'



14. 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)

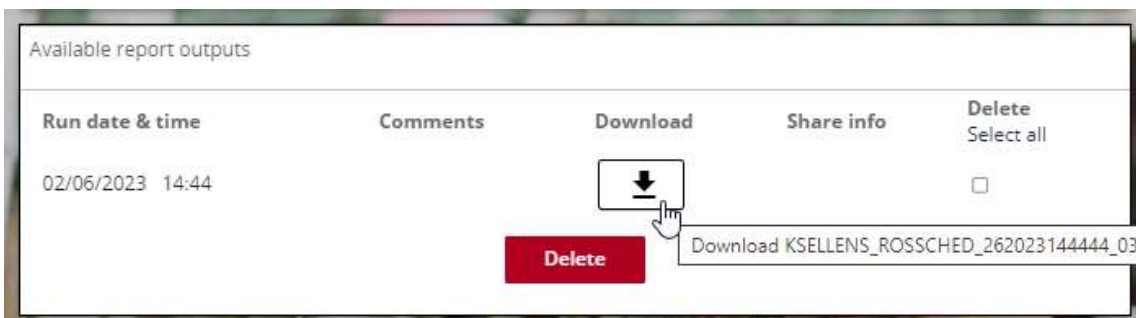
End date

Output type ▼

Report run comments

Run

15. 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 link 4 for Download report. Select the download button to open the report.



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

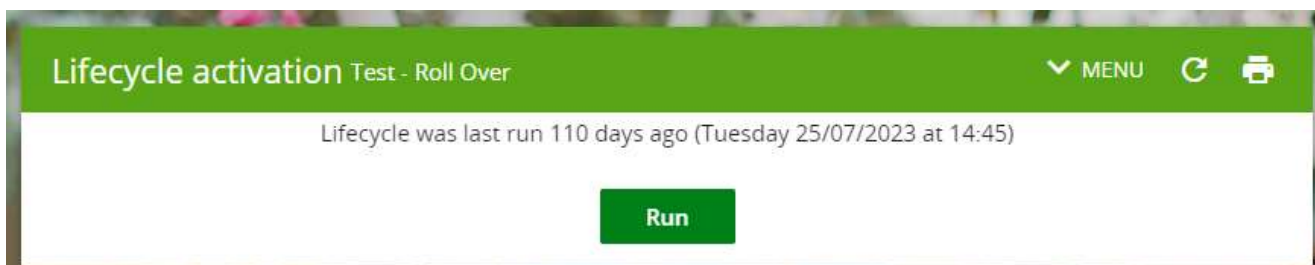
Stage 2: Finalise Roster & Submit to Payroll

17. At the end of the week, or as needed, select the folder 'Finalising Roster & Submit to Payroll' and then '1. Roll over to next week'.





18. When prompted select the lifecycle suffixed 'Roll Over' and click 'Run'

Test - Roll Over



19. Then click 'Menu' and select the second link for 'Finalise last weeks hours'. Click into any of the shift details to amend the start/ end time or remove them completely.

Start date (required)	<input type="text" value="09/08/2023"/>	
Start time (required)	<input type="text" value="11:00"/>	
End date (required)	<input type="text" value="09/08/2023"/>	
End time (required)	<input type="text" value="16:00"/>	

20. When the roster accurately reflects what was worked, click Menu again and select the third link for 'Submit to Payroll'. This time choose the lifecycle suffixed submit to Payroll and click Run.

