RLDATIX

Configuration

Scheduling – Term Time / Annualised Hours

Introduction

Having discussed and confirmed the contractual detail and requirements for Term Time/Annualised Hours contracted staff you can look to configure the system accordingly.

By utilising the annualised hours configuration, and recording the staff this way there a both benefits to both the organisation and the employee. This is a flexible and easy way for Managers and end user staff to record and monitor working hours throughout the year.

In turn this should further enhance accurate hours management and reduce payroll and rostering inaccuracies.

Configuration

Configuration	Notes / Completed

Feature Access:
 	
The below feature accesses will be required for you as System Administrators, your Person/Roster Managers and end users:
 	
Roster Administrators:
  ▪ Establishment Actions: Management Hours Period Configurations
  ▪ Ref Data Tools: Hours Period Configuration
 	
Roster/Person Managers:
  ▪ Roster Screen: Display Hours Period Balance Column – unless using Diary Configurations to view hours columns.
  ▪ Person Details: Person Hours Period
 	
End User Staff:
  ▪ Employee Online: Show Hours Period Balance.
 	
Feature Toggle Consideration:
 	
You may need to raise a support ticket to have your Feature Toggle switched on for viewing and managing Hours Periods.
 	
If you have added your feature accesses and still cannot see the reference data for Hours Period Configurations, then this will need to be actioned via a ticket on the Portal to support.
 	
Feature_ContractedHoursPeriodFunctionality	

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Reference Data:

Reference Data > Rostering > Hours Period Configuration:
- ✓ Create an Annualised Hours Period Configuration, set to the duration requirement i.e. 12 months, with a start date of beginning of working year.

Create Hours Period Configuration ⊗

Name *
Annualised Hours

Period Unit *
Months

Period Length *
12

Start Date
01/04/2022

Surplus Behaviour *
No Action

Deficit Behaviour *
No Action

☐ Create Hours Periods Where No Rosters Exist

☐ Create New Hours Period When Balance Passes Zero

☐ Is Default

☐ Is Obsolete

Reference Data > Organisation > Contract Types:
- ✓ Create a Contract Type of Annualised Hours and/or Term Time – this will allow granular and easier contract identifiable reporting.

⊕ Create Contract Type

Contract Types

Name ↑

Annualised Hrs

Reference Data > Person > Posting Types:
- ✓ Create a Posting Type of Annualised Hours and/or Term Time – this will alow granular and easier posting identifiable reporting.

⊕ Create Posting Type

Posting Types

Name ↑	Description
Annualised Hours	Annualised Hours

Reference Data > Unavailability > Unavailability Reasons:
- ✓ If required, you can set up an unavailability reason to be able to record and monitor when the staff are "not" in work i.e. away for term holidays.

Note: This unavailability is best set in the Working Day or Other Group and when recording against a person should contain working time if the contractual hours are calculated to include this. If the contractual hours are calculated for only working days, then the unavailability should not contain work time.
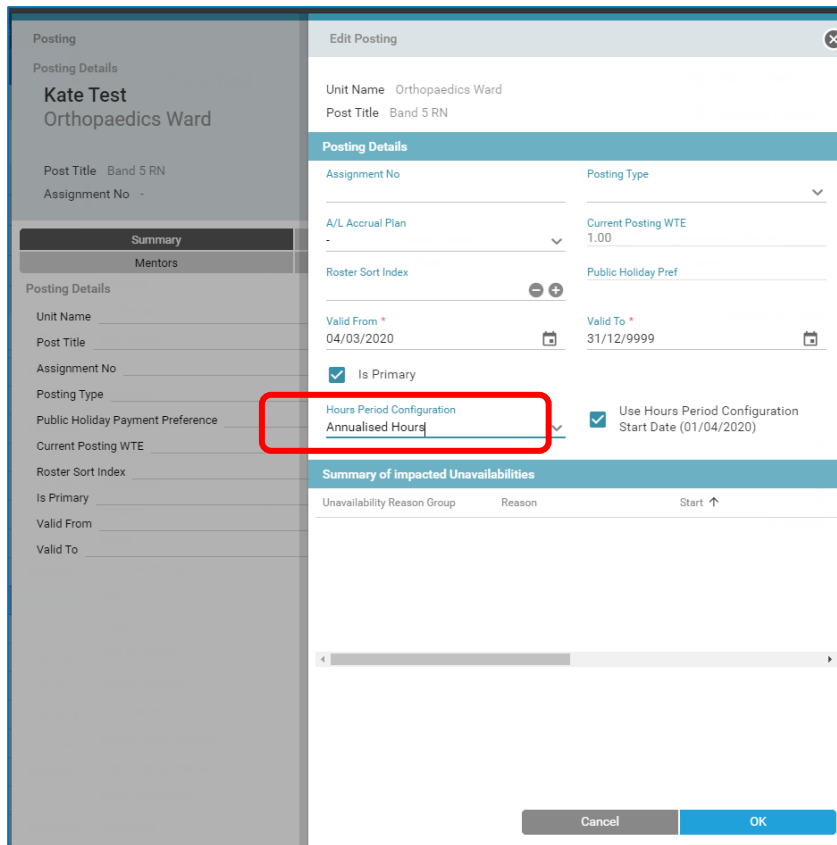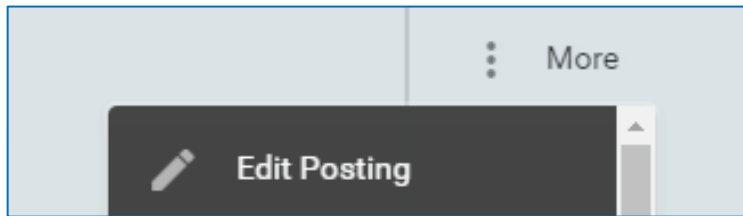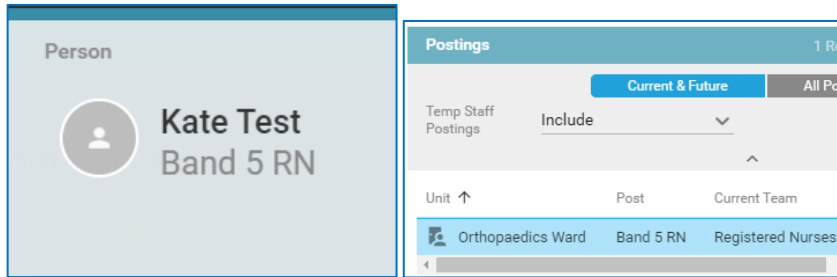

Diary Configuration:

Admin > Rostering Admin > Diary Configurations

- ✓ Create a Diary Configuration for Annualised Hours, with the column view for Hours Period Balance. This would allow your users to have a different view for working hours management to default Roster View Hour columns when viewing rosters. They will be able to toggle between as required.

Note: if this is not required you will need to ensure the Feature Access for Roster Screen: Hours Period Balance is set against the User Role and Profile instead.

Posting Management:

- ✓ In Person Search - Edit Person – Posting - Edit Posting update the person to hold the Hours Period Configuration for their posting – Annualised Hours, this will set the hours for the year they are contracted to work to allow for counting down as they are rostered shifts and/or Unavailabilities.
- ✓ Update the Posting Type to Annualised Hours. (Optional)
- ✓ Update their Contract Type to Annualised Hours. (Optional)

Staff / Roster Manager User Account:

- ✓ Check they have the relevant Feature Accesses for viewing staff Hours Period Balances.
- ✓ Check they have the diary configuration for viewing the different Hours Column views on view roster.
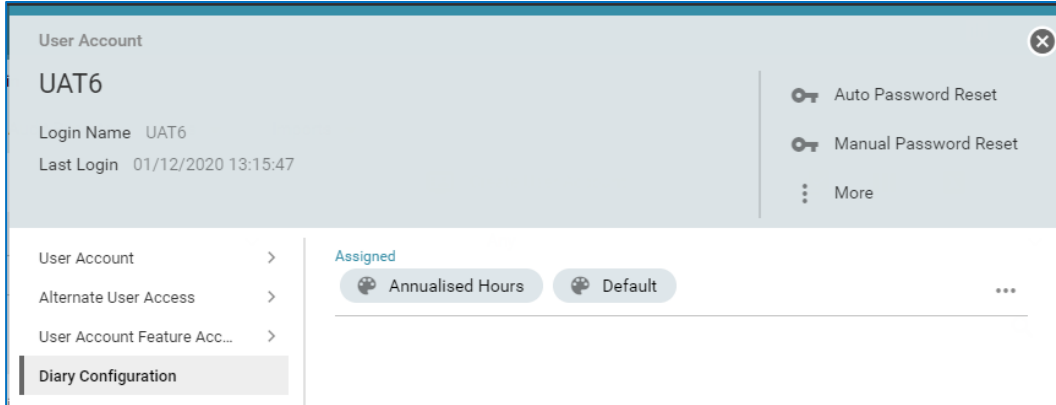
Roster View:

- ✓ When going to View Roster the Manager will either be able to see the Hrs Period Balance column (if set via feature access) or see both Diary Views that they can toggle between to view the default roster columns and/or staff hours balance.
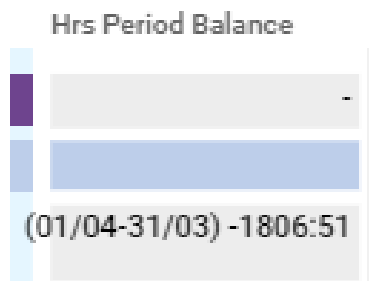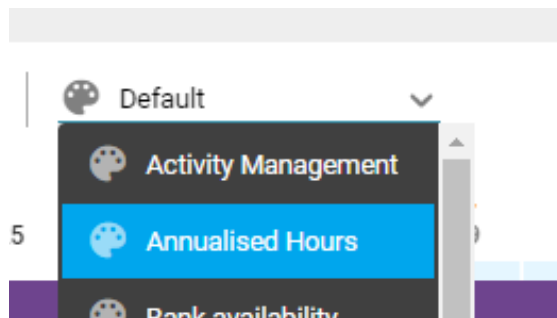
Person Hours Review:

- ✓ Within the Personnel Tabs you can view the Person Hours Balances for each period.

Person Hours Periods				2 Records		
From *	01/12/2020		To *	31/12/2021		

| Hours Period Configuratio...	Start Date	End Date	Actual Bal...	Balance If Requests Approved
Annualised Hours	01/04/2020	31/03/2021	-509:51	
Annualised Hours	01/04/2021	31/03/2022	-1920:51	

EOL / LOOP:

- ✓ Staff will be able to view their running balance in EOL/LOOP on their View Roster screen (as long as they have been given the relevant EOL account feature access):
- ✓

Posting Maintenance:

- ✓ When needing to reassign or amend a staff posting you will also need to ensure you reassign the Annualised Hours Configuration.
- ✓ This can be done at the same time of reassignment for manual moves.
- ✓ If you have ESR GO and posts are moved automatically, you will need to manually update the new posting with the annualised hour configuration if required.
- ✓ If needing to close a post or person, the hours configuration will calculate to the last working day of the posting.
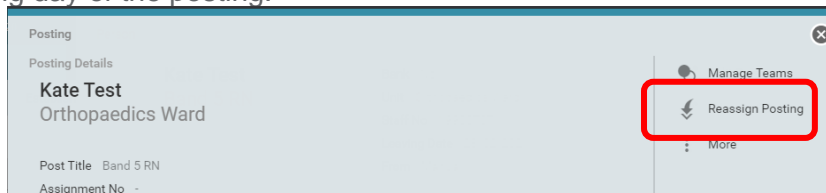
- ✓ On the View Roster View the Hours Period Column will update with balance up to the end of the posting and show on the new posting from the start date to the end of the period.

Amends post for hours owed up to end of first posting.

Sets Hours for new posting up to end of configuration period.

- ✓ The full listing of Hours Balances can be seen on the Person - Person Hours Periods tab**.**

Person Hours Periods			3 Records			
From * 01/04/2020		To * 31/12/2021				

Hours Period Configuratio...	Start Date	End Date	Actual Bal...	Balance If Requests Approved
Annualised Hours	01/04/2020	29/11/2020	-404:47	
Annualised Hours	30/11/2020	31/03/2021	-105:04	
Annualised Hours	01/04/2021	31/03/2022	-1920:51	

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