

# 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:	
<ul> <li>Roster Administrators:</li> <li>Establishment Actions: Management Hours Period Configurations</li> <li>Ref Data Tools: Hours Period Configuration</li> </ul>	
<ul> <li>Roster/Person Managers:</li> <li>Roster Screen: Display Hours Period Balance Column – unless using Diary Configurations to view hours columns.</li> <li>Person Details: Person Hours Period</li> </ul>	
<ul> <li>End User Staff:</li> <li>Employee Online: Show Hours Period Balance.</li> </ul>	
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	





Reference Data - Rostering > Hours Period Configuration, set to the duration requirement i.e. 12 months, with a start date of beginning of working year.         Image: Configuration of the Hours Period Configuration of working year.         Image: Configuration of the Hours Period Configuration of working year.         Image: Configuration of the Hours Period Configuration of the duration requirement i.e. 12 months, with a start date of beginning of working year.         Image: Configuration of the Hours Period Configuration of the duration requirement of the Hours Period Configuration of the Hours Period Configuration of the Hours Period Configuration of the Hours Period Where No Rosters Elist is behavior * No Action * No Ac	Reference Data:	
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Annualised Hours Annualised Hours	Name 1	Description
	Annualised H	lours Annualised Hours



Reference Data > Unavailability > Unavailability Reasons: ✓ If required, you can set up an unavailability reason to be able to record an when the staff are "not" in work i.e. away for term holidays.	d monitor
Note: This unavailability is best set in the Working Day or Other Group and when against a person should contain working time if the contractual hours are calculat include this. If the contractual hours are calculated for only working days, then the unavailability should not contain work time.	recording ed to e
Create Unavailability Reason Details Unavailability Reason Details Short Name * Term Time Non Working Full Name * Term Time Non Working Code Unavailability Reason Group * Working Day	
Diary Configuration:	
Admin > Rostering Admin > Diary Configurations	
Create a Diary Configuration for Annualised Hours, with the column view for version Balance. This would allow your users to have a different view for we hours management to default Roster View Hour columns when viewing row They will be able to toggle between as required.	or Hours orking sters.
Note: if this is not required you will need to ensure the Feature Access for Roster Hours Period Balance is set against the User Role and Profile instead.	Screen:
Create Diary Configuration	
Name Annualised Hours	
Diary Configuration       Image: Composition Composition         Name Annualised Hours       Image: Comp Diary Configuration         Is Stock False       Image: Delete Diary Configuration	
Edit Diary Configuration Diary Configuration Columns Access Control	
Diary Configuration Columns Edit	

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. User Account ⊗ UAT6 On Auto Password Reset Login Name UAT6 O- Manual Password Reset Last Login 01/12/2020 13:15:47 : More Assigned User Account 🕐 Annualised Hours 🛛 🍄 Default ... Alternate User Access 5 User Account Feature Acc... > **Diary Configuration** 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. Default Activity Management 5 Annualised Hours nk availabilit Hrs Period Balance (01/04-31/03) -1806:51



Person Hours Review:	
✓ Within the Personnel Tabs you can view the Person Hours Balances for each period.	
Person Hours Periods 2 Records III X C	
From * 01/12/2020 <b>To</b> * <u>31/12/2021</u>	
Q	
Hours Period Configuratio Start Date End Date Actual Bal Balance If Requests Approved	
C Annualised Hours 01/04/2020 31/03/2021 -509:51	
Co 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 Rost screen (as long as they have been given the relevant EOL account feature account where the state of the st	ter ess):
<ul> <li>✓ When needing to reassign or amend a staff posting you will also need to ensure reassign the Annualised Hours Configuration.</li> <li>✓ This can be done at the same time of reassignment for manual moves.</li> <li>✓ If you have ESR GO and posts are moved automatically, you will need to manu update the new posting with the annualised hour configuration if required.</li> <li>✓ If needing to close a post or person, the hours configuration will calculate to the working day of the posting.</li> </ul>	≩ you ally ⊧last







Person Hours F	Periods		3 Records		G
From *	01/04/2020	To *	31/	/12/2021	i Q
		^			_
Hours Period Confi	guratio Start Date	End Date	Actual Bal B	alance If Requests	Approved
📩 Annualised H	lours 01/04/2020	29/11/2020	-404:47		
📩 Annualised H	lours 30/11/2020	31/03/2021	-105:04		
📩 Annualised H	lours 01/04/2021	31/03/2022	-1920:51		





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