

HUMAN RESOURCES

VIEW, ADD, EDIT, DELETE SHIFTS

Setting up shifts is important for workload scheduling and SLA Monitoring.

1 normal work week shift is required for technicians and SLA monitoring.

Additional shifts can be added for customers that have different trading hours, and subsequently linked to the relevant employee(s).

Normally, shifts will have **7** days (for a standard week).

The *Shifts* docking panel lists all the shifts assigned to the *selected* employee.

Ribbon Access: Finance and HR > Employees

	¥				BPO	Version 2.1.0.29 - Example C	ompany				1		×
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The *Employees* listing screen will open.

SELECT EMPLOYEE

- Click on the *row selector* in front of the *employee* you wish to assign a shift to.
- Click on *Edit*.



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The *Edit Employee* screen will be displayed.



THE SHIFTS PANEL

• The *Shifts* docking panel is on the right-hand side of this screen.

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- Right click in any row (except the filter row) to display a pop-up
 Process menu.
- Click on *Shift* Add new shift.





The *Select a shift* screen will be displayed.

- Click on the *row selector* in front of the *shift* you wish to assign to this employee.
- Click on Ok.

Help v2.5.1.4 - Pg 5 - Printed: 27/06/2024



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• The selected shift will now be displayed in the *Shift Name* column of the *Shifts* docking panel.



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SELECT START DATE

- The *Start Date* column will auto populate with the current date.
- Click on the *drop-down arrow* in the date field to display the *cal-endar*.
- Click on the correct *start date*.



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• The selected date will now be displayed in the *Start Date* column.



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SELECT START DAY

1. Scroll right in the Shifts panel to the *Start Day* column and click in this field.

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2. An *ellipsis button* will be revealed, click on this button.

The *Select a shift day* look up screen will pop up.

- Click on the *row selector* in front of the appropriate start day number: (Monday = 1, Tuesday = 2, Wednesday = 3) etc.
- Click on *Ok*.



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• The selected start day date will now be displayed in the *Start Day* column.

SAVE SHIFT ASSIGNMENT

• When you have finished adding the shift details to this employee, click on *Save*.



Link a Shift Assignment

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- A message box will pop up advising the following:
 - ° Employee: [] has been saved.
- Click on OK.



Link a Shift Assignment

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• You will return to the *Employees* listing screen.

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