

Student Employment Management System (SEMS)**Scheduling User Guide - Managers**

(Last Revision: 9/19/19)

Overview:

SEMS Scheduling is an easy and efficient way for managers to create and organize schedules. If departments are properly integrated within SEMS, it can be a powerful cross-application tool.

Key Terms:

- **Workgroup:** tool to group student employees by job within SEMS
- **Job:** An employment role within SEMS associated with a specific position
- **Position:** Official SAP position title an employee holds
- **No Approval Required Shift Type:** shift type that requires **no** manager actions for students to claim bid shifts or claim sub-requests
- **Manager Approval Shift Type:** shift type that **does** require manager actions when students claim bid shifts or sub-requests.
- **Bid Shift:** open, claimable shift created by a manager; available to all student employees or a specified set
- **Sub-Request:** claimable shift created by a student employee when they request a substitute for an assigned shift
- **Employee Whitelist:** list of employees that are eligible to claim a specific bid shift; the whitelist can be defined by either a set of student names or by position.

Getting Started:

Sign in using your Purdue Career Account:

<https://www.purdue.edu/studentemployment/Account/Login>



Note: Chrome or Firefox are preferred browsers. Internet Explorer may not be compatible

Administrative Notes**Setting up a Job:**

Job creation requires setup by a SEMS site administrator. The site administrator will have to link the desired SAP positions to a new job in SEMS. This process requires a dialogue between the site administrator and the manager, discussing what the functionality of the job will be, which positions to include, and the title of the job.

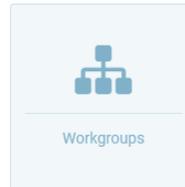
Setup

Workgroups:

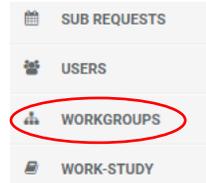
Workgroups are an essential tool in SEMS. They allow managers to group their employees together by job, enabling actions to be applied to the group instead of just the individual.

Managing a Workgroup:

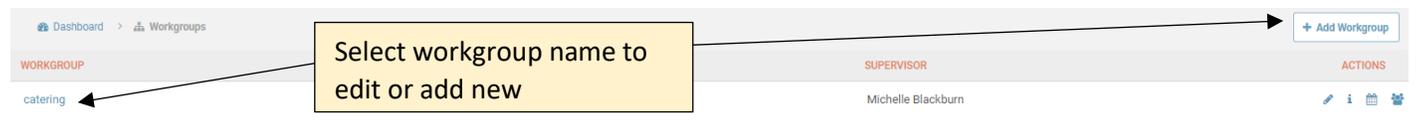
- 1) From Dashboard, select "Workgroups"



or



- 2) Select workgroup name to edit existing

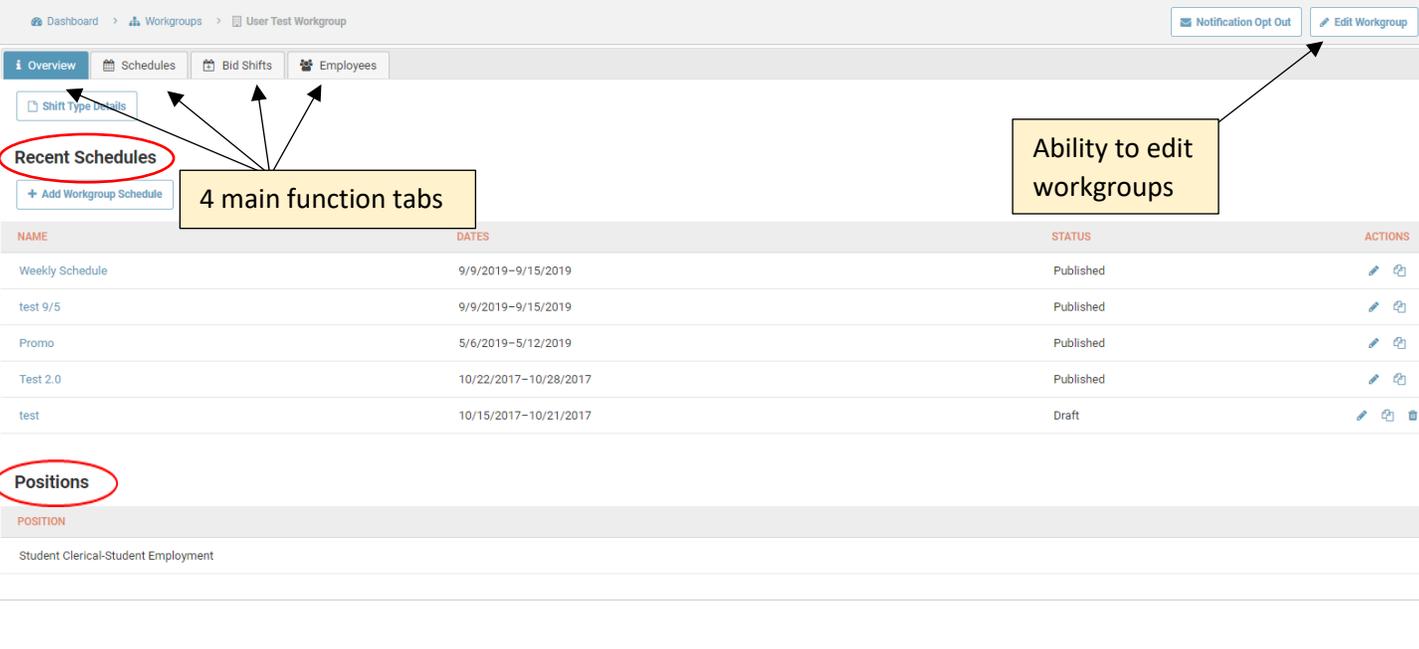


- 3) When adding a workgroup, be sure to *accurately* identify positions you wish to include
- 4) Select shift type, then save

Schedule Creation

Layout:

Select the now created workgroup



The overview page for workgroups includes function tabs, recent schedules, positions in the workgroup, and action buttons.

The “Edit Workgroup” tab is where a manger can add delegates to assist with scheduling

Delegates

DELEGATE	CAN PUBLISH?	CAN CREATE?	CAN EDIT?	RECEIVE EMAILS?	MANAGE JOBS?	MANAGE SUB REQUESTS?	ACTIONS
SIMON MICHAEL SHAMO	✓	✓	✓	✓	✓	✓	

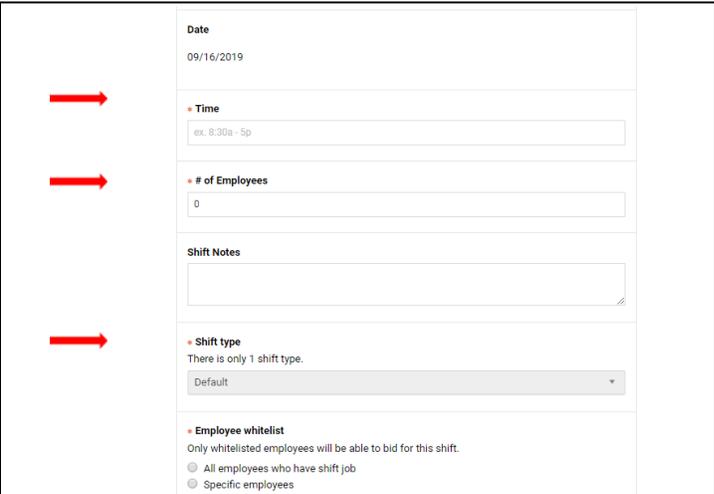
Creating a Schedule:

- 1) Select “Add Workgroup Schedule” [+ Add Workgroup Schedule](#)
- 2) Select a starting date and save

- 3) Add an individual shift
 - i. Click the plus symbol on the desired date
 - ii. Complete the “Add Shift” wizard box:
 - a. Shift name
 - b. Shift time
 - c. Include notes (optional)
 - iii. Save

Note: shifts can only be added to weekly schedules. Cloning (pg. 4) allows you to expand a weekly schedule.

- 4) Add a bid shift
 - i. Click the plus symbol in the bid shifts row
 - ii. Complete the “Add Bid Shift” wizard:
 - a. Shift name
 - b. Position
 - c. Job
 - d. Time
 - e. Number of employees
 - f. Shift notes (optional)

<p>g. Shift Type</p> <p>h. Employee Whitelist</p> <ul style="list-style-type: none"> - Options include all students you supervise or a specific set that you create. <p>iii. Save</p>	 <p>The screenshot shows a form with the following fields: Date (09/16/2019), Time (ex. 8:30a - 5p), # of Employees (0), Shift Notes (text area), Shift type (Default), and Employee whitelist (radio buttons for 'All employees who have shift job' and 'Specific employees').</p>
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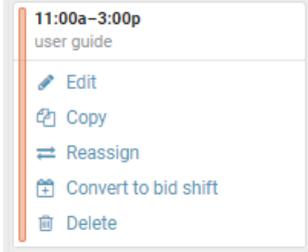
Adding multiple shifts:

Add the same shift to multiple employees simultaneously

Expanding Shifts to the Rest of the Week:

Individual shift actions from the drop-down allow you to:

- Edit the shift
- Copy the shift
 - Effectively duplicating the shift to another date or employee
 - Shift notes do not copy
- Reassign
 - Switch the employee assigned to the shift
- Convert to a bid shift
- Delete shift



Publishing:

Select "Publish Schedule"

 Note: Any edits made to a published schedule will be reflected in real time.

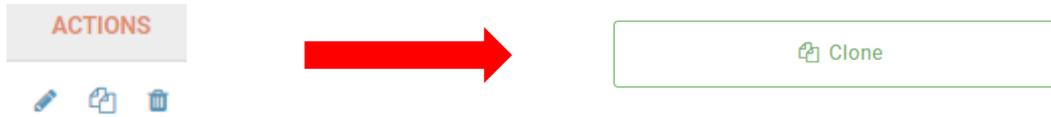
Triggers notification to members of the workgroup that a schedule has been published

Schedule Management

General Management:

Cloning a schedule:

- From the “Schedules” function tab within your work group, you will see action buttons in the far right column



- By clicking the icon, you are able to clone your schedule for a future week. This allows you to extrapolate the exact shifts and bid shifts into the future.

Shift type details:

- From the “Overview” tab, “Shift Type Details” allows you to view shift type settings.



Managing an employee’s shifts:

- From the “Employees” tab, select the icon
- Gives a view of all that specific student’s shift

SHIFT NAME	SHIFT TIMES	WORKGROUP	POSITION	JOB	STATUS	ACTIONS
test	10/23/2017 08:00AM - 10:00PM	User Test Workgroup	Student Clerical-Student Employment	Student Employment Assistant	Assigned	
Eng Open House	10/23/2017 08:00AM - 10:00PM	User Test Workgroup	Student Clerical-Student Employment	Student Employment Assistant	Assigned	

Managing Bid Shifts:

- Select the ‘Bid Shifts’ tab from either the dashboard or the workgroup overview page.
- The action icon in the right column allows you to edit the shift.
 - Editable fields include: shift name, number of employees, notes, and whitelist

SCHEDULE NAME	SCHEDULE DATES	JOB	SHIFT NAME	SHIFT TIMES	NEED	ASSIGNED	PENDING APPROVAL	ACTIONS
user guide	09/16/2019 - 09/22/2019	Student Employment Assistant	User Guide 1	09/18/2019 01:00PM - 05:00PM	2	0	0	
user guide	09/16/2019 - 09/22/2019	Student Employment Assistant	User Guide 2	09/21/2019 08:00AM - 11:00AM	1	0	0	
user guide	09/16/2019 - 09/22/2019	Student Employment Assistant	User Guide 3	09/22/2019 11:00AM - 04:00PM	1	0	0	

- The icon allows you to view the schedule containing the bid shift

- The icon allows you to process claims made on bid shifts

Note: If shift type is set not set to manager approval, you will not be required to approve claimed bid shifts.

No Approval Required Shift Type:

Manager Approval Shift Type:

5a. able to see who has claimed a bid shift and remove them from the shift (reopening the bid shift)

5b. able to change status of bid shifts to approved, denied, or pending

<p>The status of the bid shift will update when employees claim shift and when you take actions of claims and shifts</p>	<table border="1"> <thead> <tr> <th>NEED</th> <th>ASSIGNED</th> <th>PENDING APPROVAL</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>0</td> </tr> <tr> <td>1</td> <td>0</td> <td>0</td> </tr> <tr> <td>1</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	NEED	ASSIGNED	PENDING APPROVAL	1	1	0	1	0	0	1	0	0
NEED	ASSIGNED	PENDING APPROVAL											
1	1	0											
1	0	0											
1	0	0											

Notification is triggered any time a status change occurs for a student; Manager is notified when action is needed.

Sub-Requests:

- 1) Select 'Sub Requests' tab from the dashboard
- 2) View status and ownership of current sub-request's

WORKGROUP	JOB	OLD EMPLOYEE	NEW EMPLOYEE	SHIFT	START	END	STATUS	REASON
User Test Workgroup	Student Employment Assistant	SAMUEL CLAY TROMPEN		User Guide 1	September 18, 2019 01:00PM	September 18, 2019 05:00PM	Removed	test
User Test Workgroup	Student Employment Assistant	SAMUEL CLAY TROMPEN		User Guide 1	September 18, 2019 01:00PM	September 18, 2019 05:00PM	Requested	my exam got rescheduled to this date and time

- 3) The icon allows you to process claims made on bid shifts
- Note: If shift type is set not set to manager approval, you will not be required to approve claims on sub-requests.

No Approval Required Shift Type: Manager Approval Shift Type:

- | | |
|---|--|
| <p>4a. able to remove sub-requests, effectively canceling the request</p> | <p>4b.</p> <p>Approve – allow the student to claim the shift</p> <p>Deny – deny the claim</p> <p>Remove – cancel the sub-request</p> |
|---|--|

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<p>If a sub-request is claimed by another student, it will automatically be claimed</p>	<p>Even once a sub-request is claimed it is the assigned students responsibility until the manager approves the claim</p>
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	<div style="display: flex; justify-content: space-between;"> STATUS ▾ REASON ▾ </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <input style="width: 150px;" type="text" value="Search..."/> <input style="width: 150px;" type="text" value="Search..."/> </div>								
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Requested</td> <td style="width: 50%; text-align: center;">test</td> </tr> <tr> <td style="width: 50%; text-align: center;">PendingClaim</td> <td style="width: 50%; text-align: center;">sick</td> </tr> <tr> <td style="width: 50%; text-align: center;">Requested</td> <td style="width: 50%; text-align: center;">doctors appointment</td> </tr> <tr> <td style="width: 50%; text-align: center;">Requested</td> <td style="width: 50%; text-align: center;">my exam got rescheduled to this date and time</td> </tr> </table>	Requested	test	PendingClaim	sick	Requested	doctors appointment	Requested	my exam got rescheduled to this date and time
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