

Recurring Events

Recurring events are used by the peoplehours application to project a future plan of events, template, to be worked for review by the user. These Events do not cause any pay or billing output, before this happens they need to be created as Diary Events.

Recurring events can be created either by using Diary Events that have already been created as the template or directly from the Scheduling windows.

All recurring events are created as individual events.

Creating Recurring Events – By Location – Existing Events

Open the Schedule application.

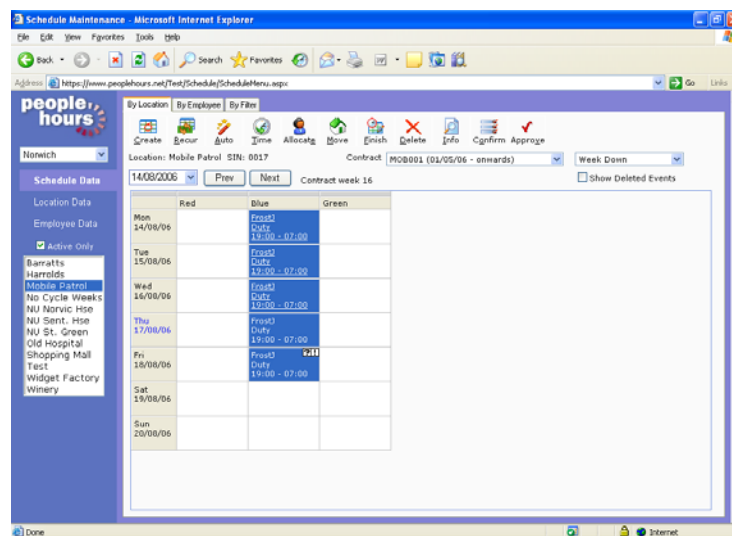
Select the Schedule Data tab from the left of the window.

Select the By Location tab from the top of the window.

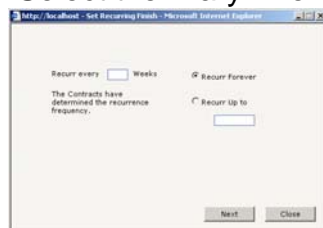
Select your new location from the list displayed on the left of the window. The application will display the By Location window showing details of the selected location, see below.

Select the contract you wish to create Recurring Diary Events for from the Contract drop down list at the top of the window.

Select the week that you wish to create Recurring Diary Events for.



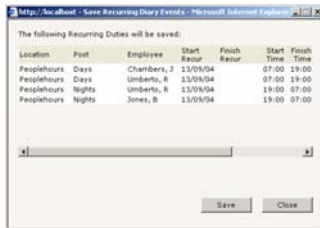
Select the Diary Events that you wish to use as a template by clicking on each one.



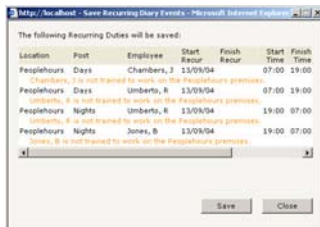
Click on the 'Recurring' button. The Set Recurring Finish window will now be displayed.

If the number of weeks in the event cycle were specified when the Location Contract was set up, the Recur Every Weeks field will be disabled. If the number of cycle weeks was not specified you can enter the value.

The application defaults to creating recurring events "forever" i.e. for the lifetime of the contract. If you want the recurring events to be created for a specific period, click on the 'Recur up to' button and enter the end date in the field below.



Click on the 'Next' button. The application will display the Save Recurring Diary Events window.



Click on the 'Save' button. The application will now validate the employees against the Diary Event and display any Event Check failures found. Over-rideable checks are displayed in **amber**; non over-rideable checks are displayed in **red**. If there are non over-rideable checks displayed, the 'Save' button will be greyed out.

Click on the 'Save' button and the recurring diary events will be created.

Repeat for each cycle week for the location and contract.

Amending Recurring Events

Recurring Events are created as individual events. Care should be taken when amending recurring diary events to ensure that the correct events are amended.

The procedure for amending recurring events is the same as applied to normal Diary Events; details are given in below in this section.

Recurring Events – AutoCreate

The AutoCreate function allows the user to AutoCreate recurring events for a specified period, for a branch, a location, a contract, a post or just the selected events.

Before this function can be used a reason needs to be created in the Administration module.

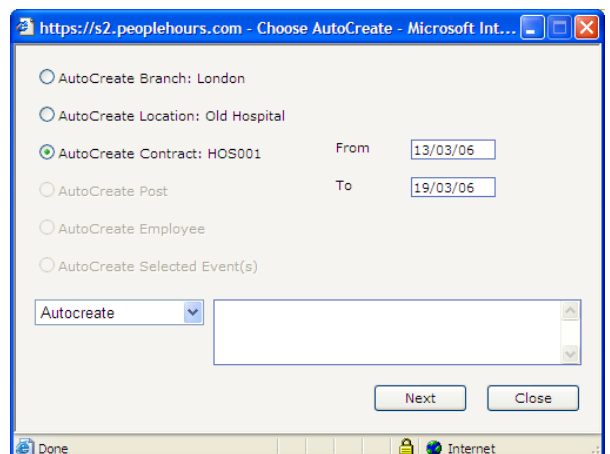
If the process finds an un-overrideable check failure when creating events, the event will be created as an unallocated event. This and any overrideable check failures will be displayed in the AutoCreate window once the process has finished.

Using AutoCreate

Open the Schedule application.

Select a location or employee with recurring events.

Click on the 'Auto' button. The application will display the Choose AutoCreate window.



Select the option you wish to AutoCreate events for by clicking on the relevant radio button. The options are:

- Branch – the branch to which the selected location belongs
- Location – the selected location
- Contract – the selected contract within the location

The following three options are also available if recurring events have been selected prior to clicking on the 'Auto' button:

- Post – the selected post with in the contract
- Employee – the employee allocated to the selected events
- Selected events – just the selected events

Next enter from and to dates for the period that you wish to create events for.

Select the reason and enter comments of required.

Click on the 'Next' button. The application will now display a progress window. This window will display the progress of the AutoCreation process which may take some time depending on the option and date range selected. This window can be closed if required and the process will continue in the background.

If you wish to stop the process at any time, click on the 'Cancel' button.

Once the process has been completed, the AutoCreate window will display the message 'Successfully completed', the number of events that have been created and will indicate how many of the created events had overrideable check failures and how many event that have been created as unallocated due to un-overrideable check failures.

