

The assignment transfer feature automates the process of discovering the individuals who are qualified to transfer from areas of overcoverage to where you need them. **Transferring staff is as easy as a click of the mouse.**

What's New in Workforce Scheduler v6.1

With Workforce Scheduler™ v6.1, it is easier than ever to manage coverage and engage employees in the scheduling process. Here's how...

Complete automation

One scheduling product

Prior to this release, scheduling features were packaged for specific market verticals. For example, healthcare customers did not get the same feature set as retail customers. However, we have learned that features designed for one industry can also have uses in another. Therefore all customers of Workforce Scheduler have access to all scheduling features.

User access to features is still limited to what is needed, and no feature will be implemented if it is not to be used. The “new” features (once only used by retail) include:

- **Auto Scheduler** — Automated schedule optimization engine that calculates time and length of shifts necessary to cover a workload down to 15-minute intervals.
- **Schedule Cost** — Total schedule cost for each day and schedule period displayed in the Schedule Planner.

Workforce Forecast Manager™

Kronos labor forecasting tool has been repackaged, making it available to any organization that requires complex, detailed labor forecasts. This proven technology is able to leverage past performance as well as current volume drivers to determine an accurate forecast down to 15-minute intervals.

Schedule Generator use with forecast output

Schedule Generator creates an optimized, shift-based schedule from a workload defined by the Workload Generator. With this release, Schedule Generator can also accept a workload defined by the Workforce Forecaster, thereby providing your organization with maximum flexibility to create the unique scheduling behavior required by your business.

Assignment transfer

In some environments, workload can change moment by moment, causing your labor to become misaligned with demand during the workday. When this occurs it may be necessary to move employees from areas of overcoverage to other areas that are undercovered.

Assign shift by employee preferences

Employees are able to set a priority for jobs within their transfer sets. A job with a priority of “10” indicates that the employee would like to get this type of job. A priority of “1” indicates that the employee will take this job but only as a last resort. When the employees were automatically assigned to a shift, only a threshold could be set for preferences (e.g., assign only if the preference is greater than “5”).

With this release, employee job preferences can be sorted so that the most desired job is the one likely to be assigned.

High-quality information

Export to excel from Schedule Planner

Occasionally, managers need to manipulate the schedule information outside the Workforce Scheduler environment. In these cases, schedule information can be exported to Excel directly from the Schedule Planner.

Metrics

The Metrics feature is a configurable coverage view in the form of a hierarchical table. Users of the Metrics can define a topic of coverage, such as job or location, as well as the coverage indicator, such as workload, effectiveness, service level, etc. The Metrics allows managers to create a coverage definition that best matches the way they measure their schedule effectiveness, thereby providing the more relevant data to managers so they can make informed decisions.

HPPD report

For use in a healthcare environment, this report displays coverage in hours per patient day (HPPD). This ratio is critical for maintaining quality care and compliance with regulatory entities.

Location report

The new location report comprises a list of who is scheduled to work each job by location for a period of up to four weeks. The report also indicates who is on leave, vacation, or any other event that impacts availability.

Workload Audit

In very dynamic environments, such as hospitals, the workload can change at any moment. When this occurs, staffing changes must be made. At times, it is necessary to justify the staffing changes to help ensure compliance with company goals or with external auditing agencies. Therefore, the Workload Planner now includes a Workload Audit view to streamline the audit process.

Schedule Audit

Understanding why one employee is assigned a shift while another is not can be very complicated, especially if changes can be made by more than one person. With the inclusion of Schedule Audit, managers will be able to navigate and search through multiple employees and determine who made what changes and when.

Easy to own

Improved employee self-service

Organizations that are currently using employee self-scheduling can continue to do so without change. However, a new employee self-service option is available with this release that enables employees to see, on a single screen, all the information necessary to guide them when planning a change in their schedule. Such information includes, but is not limited to, the employee's timecard, available time off, and a calendar view of the employee's schedule.

Managers can see schedule-related requests from employees on the Schedule Planner, simplifying the approval process. Additionally, managers can control when employees are able to submit requests.

By improving and simplifying the employee self-service processes, employees are able to achieve a better work/life balance, while managers have greater visibility and control over their workforce.

Save selected locations

Frequently, it is necessary for a manager to limit his or her scheduling activities to a few locations. This is accomplished through the use of the Select Locations feature of the Schedule Planner. Once locations have been selected it is now possible to save these settings so managers can more quickly and easily access the most appropriate schedule configuration for the task at hand.

Sort and filter

When filling open shifts using the Call List, it is sometimes necessary to limit the type of worker for consideration — only full-time employees, for example. By using a custom sort, managers are now able to select a subset of employee types for sorting. All other employee types are excluded from consideration.

Contract scheduling

Support has been added for managers attempting to schedule based on a contract. This includes additional contract rules as well as new key performance indicators.

Multi-edit

Managers can make modifications to multiple shifts simultaneously, saving time and effort.



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