Intellicate Schedule24 Resource Manager

A Product Guide for Business and Operations Managers

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INTRODUCTION

Employee scheduling and workforce deployment is critical for business profitability in today's competitive markets. For some it is an administrative burden to be delegated, but for the conscientious manager it is an integral management skill that directly impacts on business outcome. Major shifts in labor and workforce trends in recent years mean new business goals for extending the working day, or even 24 hour working are needed to deliver services and production schedules. Traditional working practices are becoming less flexible, and the growth in part-time working, job sharing, flexible working practices, and new ways of working has made employee scheduling and workforce deployment a complex and time consuming business.

Workforce scheduling software is not altogether new but it has traditionally been part of big business systems that only corporate budgets could feed. This leaves the greater part of businesses to struggle with paper and pencil, or perhaps basic office software unsuited to the dynamics of the scheduling problem.

While business managers know it makes sense to have a good workforce strategy and coordinated workforce, especially where shifts are involved, they just don't have the time to develop good scheduling management beyond basic *shift scheduling.* Especially one that is flexible and responsive to changing business requirements.

The key to managing the high performance workplace is to simplify and innovate new ways for employees to meet the business requirement. A business can respond faster and more profitably with a flexible workforce. Often just gathering information from different sources about staff availability and the business requirement is a significant overhead. Without a reliable system for delivering good schedules, inefficiency and confusion will result.

The answer to all of this is Intellicate Schedule24 Resource Manager workforce scheduling software. Schedule24 Resource Manager is for managers having to deliver flexible working strategies in today's competitive markets. Schedule24 Resource Manager manages all the complexity of workforce management and staff deployment strategy with a comprehensive and integrated workflow of key processes.

It can be deployed on standard office computers. No special training or technical IT support is required. Schedule24 Resource Manager has been deployed and used for teams as small as 5 or 7 staff and has been strategically deployed to manage corporate resources of over 8,000 thousand staff. Above all the Microsoft Office 2003 "look and feel" makes it easy to understand and use. It is all that your business needs to deliver comprehensive and effective strategy for employee scheduling and workforce deployment.

WORKFORCE MANAGEMENT FOR BUSINESS OPERATIONS

Schedule24 Resource Manager is designed to meet the management need for delivering flexible working strategies in today's competitive markets. This desktop solution goes beyond the key features expected from employee scheduling software such as contact management, shift scheduling, calculating hours worked, staff counts, vacation tracking, roster management and publishing schedules. In addition to all these features it includes powerful schedule wizards, a design environment for creating and customizing shift patterns, assignment scheduling to coordinate tasks and jobs. It offers high levels of automation including schedule production, calculations and Automatic Conflict Monitoring (ACM) that checks staff availability status, working hour and rest periods thresholds including overtime as you schedule. This effectively provides an audit of staff working hours before publishing schedules – not after. This means reduced re-scheduling errors and risk. More importantly all this information can be combined and analyzed to give clear strategic insight about the capacity of the workforce to deliver efficient and profitable business outcomes.

With Schedule24 Resource Manager the manager can plan further, quicker, and smarter to deliver a more pro-active enterprise:

⇒ **Easy to use workforce scheduling**
Fully featured workforce management system, designed to meet the demands of today's business. With the familiar Microsoft Office "look and feel" interface, little time is needed to use this powerful and integrated solution.

⇒ **Save time and reduce the cost of scheduling**
Reduce the time taken by managers to deliver good workforce schedules so they can be more productive. The cost of publishing scheduling information is significantly reduced by publishing to the web or emailing direct to employees.

⇒ **Innovate to deliver flexible working solutions**
Powerful wizards combined with a shift pattern design environment can deliver a wide range of flexible working arrangements.

⇒ **Safeguard business profitability**
Automate cost calculations as you schedule. Manage variable cost rates for different types of employee compensation, or costing service delivery to customers and clients means improved decision making before resources are committed - not after.

⇒ **Reduce Risks**
Automatic Conflict Monitoring (ACM) control you can be guaranteed never to publish non-compliant schedules again.

SCHEDULE24 RESOURCE MANAGER HIGHLIGHTS AND FEATURES

⇒ **Fully featured Staff Manager for keeping information in one place**

- ○ Maintain up to date staff information, photo ID and contact details
- ○ Maintain comprehensive staff roles and training records
- ○ Maintain service record, including department and job title history
- ○ Individual staff cost or compensation management
- ○ Individual staff working hour profile and thresholds
- ○ Individual staff work availability schedule

⇒ **Feature rich scheduling work area for more productive working**

- ○ Forward planning with a perpetual scheduling calendar
- ○ Be more productive and work faster with unique scheduling tools
- ○ Supports structured and unstructured *ad hoc* scheduling styles
- ○ View and work with multiple schedules.
- ○ Wide sweep staff and date navigation
- ○ Powerful search, retrieve and sorting of scheduling content
- ○ Information on demand displays without changing screen view
- ○ Schedule shifts, assignments, breaks, unavailability and memo information
- ○ Conflict warning for assignment and unavailability clashes.
- ○ Multiple layer toggling for viewing different information types
- ○ Color mapping for shift types, scheduling activity, days-off and public holidays
- ○ Manage continuous and split shift working and shift descriptions
- ○ Advanced hierarchical sort and order of multiple categories of information including department, job title, teams and staff ordering.
- ○ View and work on multiple schedules in windows and tabbed arrangements
- ○ Multiple read access of schedules over Windows® networks

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⇒ **Automated Schedule and Shift Pattern Wizards for faster schedules**

- o Automate structured scheduling solutions using step by step options

- o Automatically calculate staff count for any structured schedule.

- o Define multiple shift times and shift descriptions

- o Create fixed or rotating schedules or a combination of both

- o Statistical feedback for maximum and average weekly working hours, as well as average and minimum rest period hours.

- o Set Day-off Day-on (DODO) ratios with no isolated or "orphan" days-off

- o Forward or backward day-off staggering to maximize rest periods

- o Proportional or individual staff distribution for defined shifts

- o Define direction of rotation (DOR) for healthy shift work options

- o Define speed of rotation (SOR) to reduce unsocial hours working and sleep deprivation

⇒ **Shift Pattern Design Environment**

- o Integrated design environment for designing any shift pattern combinations

- o Total control for creating shift patterns for individual or team working

- o Implement over 30 business and shift pattern and scheduling rules

- o Point and click editing means no programming or scripting skills required

⇒ **Team Manager for flexible working**

- o Combine and manage any number of shift patterns in your schedule

- o Drag and drop individual staff or team allocation

- o Rank and order staff in a team

- o Modify staff distribution by date

- o Automatic or drag-and-drop staff distribution across multiple shift patterns

- o Automatic schedule updating

⇒ **Automated Cost Management for improving business awareness**

- o Global and individual costs

- o Manage hourly, daily or amortized salary costs

- o Variable rate options automatically calculate basic, overtime, premium, weekend and public holiday rates

- o Detailed cost breakdown of individual and sub-group totals

- o Dynamically calculate and display exact, average or projected costs over any date range during scheduling

- o Export detailed cost information to Excel® 2003 via reporting feature

⇒ **Active Conflict Monitoring (ACM control)**

- o Continuous or on demand monitoring

- o Staff work hour thresholds

- o Staff rest periods thresholds

- o Compliance and work hour auditing during scheduling

- o Daily and weekly hours monitoring

- o Staff availability checking

- o Dynamic display lists conflicts

⇒ **Powerful Monitoring and Analysis Tools for more efficient scheduling**

- o Dynamically updated staff count display

- o Staffing level indicators by sub-group category for overstaffing, understaffing and acceptable staffing thresholds by count, hours and cost

- o Dynamically calculate and display staff working hours over any date range

- o Staff distribution graph by sub-group and zooming timescale

⇒ **Management Reports for informed decision making**

- o Access over 30 management reports for costs, operations, HR and research can be exported to PDF, Word or Excel.

- o Staff reporting including vacation status

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⇒ **Publishing**

- o Wizard for sending staff schedules direct by email
- o Wizard for publishing content rich web schedules to the intranet
- o All standard printing and print preview options
- o Statistical reporting on scheduling activity by individual, job title or teams
- o Page setup options to define scheduling range and content by staff and date

⇒ **Security**

- o Schedules and shift pattern designs password protected
- o Automated system backup of schedule files
- o Wizard for archiving schedules by date range options

⇒ **Import and Export**

- o Import Wizard for staff information using file CSV format
- o Import script utility for field mapping
- o Export Wizard for schedule content to Microsoft Excel and Microsoft Access
- o Export script utility for field mapping

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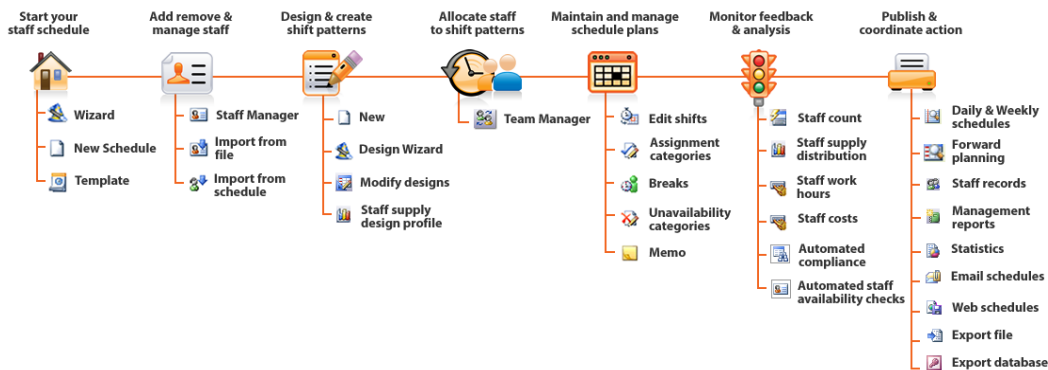## EASY TO UNDERSTAND AND USE WORKFORCE MANAGEMENT

Scheduling often involves a tangled and complex web of cross-information scattered through several different locations. Personnel information in one department, working hours and vacation records in another, calendars diaries and job information somewhere else. This often results in several schedules pinned on the wall at various locations with amendments, cross-outs and changes that bear little relation to what people are actually working. Even managers in larger organizations with integrated IT systems find they have to use paper and pencil or standard office suite software for their employee scheduling and deployment strategy to meet business goals. The main reason for this is because paper and pencil or standard office software is readily available, accessible, and doesn't require specialist IT support. Smaller businesses often don't have the budget beyond office software or the costs for supporting an IT infrastructure.

Schedule24 Resource Manager solves these problems of accessibility by delivering enterprise-class workforce management and employee scheduling software to the manager's desktop at an affordable cost. No training or specialist IT support is required and it is quick and easy to use for delivering efficient staff scheduling and workforce management from one location. All the key processes involved in managing workforce deployment are integrated in one smooth workflow. Schedule24 Resource Manager looks and feels like other Microsoft software so you can easily find the features you need.

The capability of Schedule24 Resource Manager to manage employee scheduling and workforce management information quickly and easily enables the business manager to:

⇒ **Get started quickly**
Small businesses or even corporate business units don't have ready access to IT specialists or support for their business solutions. Schedule24 Resource Manager has been specifically designed with these constraints in mind so it is easy to install, maintain and use.

Start your staff schedule	Add remove & manage staff	Design & create shift patterns	Allocate staff to shift patterns	Maintain and manage schedule plans	Monitor feedback & analysis	Publish & coordinate action
Wizard	Staff Manager	New	Team Manager	Edit shifts	Staff count	Daily & Weekly schedules
New Schedule	Import from file	Design Wizard		Assignment categories	Staff supply distribution	Forward planning
Template	Import from schedule	Modify designs		Breaks	Staff work hours	Staff records
		Staff supply design profile		Unavailability categories	Staff costs	Management reports
				Memo	Automated compliance	Statistics
					Automated staff availability checks	Email schedules
						Web schedules
						Export file
						Export database

Schedule24 Resource Manager's familiar and intuitive interface mean new computer users are soon productive by simple point and click exploration of the work area.

⇒ **Develop new management skills**
Powerful automated scheduling wizards and scheduling templates, resource managers can get off to a flying start with new ways to schedule. New ideas are easier to explain and develop for alternative working arrangements – or improving existing ones.

⇒ **Improve business awareness**
Conscientious business managers understand their business goals and reaching them takes time and energy, especially when looking into working arrangements and how they can be improved. The costs involved with external management consultants can be prohibitive. Resource managers who know and understand their business have the capacity to be their own consultant and can quickly evaluate the impact of their decisions affecting staff welfare and business costs, before executing change.

⇒ **Schedule assignments and tracking unavailability**
Once a scheduling strategy is in place it is easy to follow through with more detailed scheduling of assignments, and tracking of staff unavailability. Short notice or *ad hoc* changes can quickly compromise the best workforce planning. Monitoring these effects and when changes are likely to occur can easily be carried out using cover count analysis.

Multiple assignments are automatically cross-referenced to employees' shifts, with publishing options for web and email schedules.
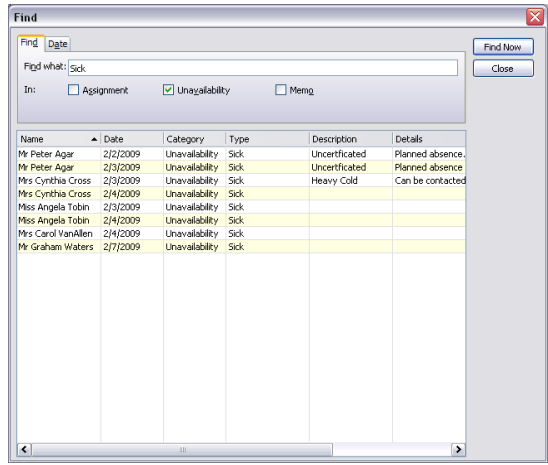
Search retrieve and sort from scheduling information over any date.

⇒ **Monitor employee working hours and costs**
Dynamic display of working hours and complex costs, whilst scheduling, means an increased awareness when it is most needed. Over a short space of time, management style becomes increasingly proactive rather than reactive and more tuned to the profitability of the business.
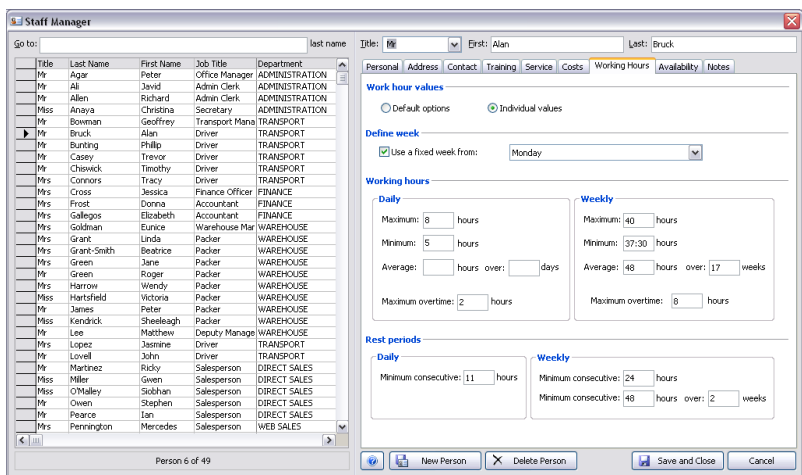
Keeping track of working preferences when planning staff deployment

enables you to be both flexible and effective.

⇒ **Communicate scheduling information swiftly**
Customizing schedule content and publishing it to the web or direct to employee email boxes means significantly reduced scheduling cost. It also means faster communication so everyone is kept up to date.

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BUSINESS SCENARIO: CORPORATE HELPDESK AND SUPPORT FACILITY

Background: A large water company operated emergency services using duty personnel operating from home for out-of-hours service. It became unsustainable to deliver the service required given the population and size of the area.

Problem: Find a solution for existing staff to work a new 24 hour working arrangement.

Centres were established, each having 45 staff to provide 24/7/365 services. Staff were drawn from existing company personnel, who had never worked shifts before. An interim spreadsheet solution was devised to allocate staff to shifts and to control and record individuals' shift patterns. It soon became evident that the spreadsheet solution was unwieldy and took up a large amount of LAN bandwidth. It was not robust and constantly crashed with data loss, and required restoring from out of date backups. This proved frustrating for staff and managers alike. Significant investment had already been made in a solution and a corporate decision had been made to convert existing scheduling arrangements to another spreadsheet solution at great cost.

Solution: Use Schedule24 Resource Manager.

⇒ **Easy to install and get started**
A small project team installed Schedule24 Resource Manager on a standalone computer. They soon discovered Schedule24 Resource Manager was reliable and easy to use. The next stage involved a full operational deployment over the company LAN. Due to compatibility with Windows XP very little IT support was needed. Different users encompassing a full range of computing abilities from novice to expert found the software flexible and easy to learn.

⇒ **Coordinate activity and increase productivity in the organization**
Network managers were able to share ideas about deploying staff over 24 hours with each other and soon established common standards which brought consistency of operation and service levels throughout all the control centres. An increase of up to 30% in staffing levels on each shift was achieved over a 24 hour period.

⇒ **Reliable, proven and sure**
Using Schedule24 Resource Manager for staff scheduling and workforce deployment contributed to the successful management of the control centers. In particular the ease of use of Schedule24 Resource Manager by users drawn from existing staff resources that had never worked or managed staff scheduling before ensured a smooth transition. Decision has been made to extend similar working arrangements to manage other assets within the company.

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INNOVATE AND DELIVER FLEXIBLE WORKING

While traditional working is still the experience of many, changes in demand patterns and workforce labor trends have combined to make the high performance workplace anything but traditional. This has increased the need for extended hours or 24 hour working in communication, manufacturing and services industries. This is a business requirement for many different kinds of smaller business operations contributing to the global business chain.

Traditional working was easy to understand and needed little coordination because everyone knew when to turn up for work, when to go home and everyone had the weekend off. Extended hours and 24 hour business operations challenge these assumptions. Also managers need to take account of a labor force increasingly seeking part-time work, job sharing and flexible working. Government legislation in many countries has been introduced to formalize many of these work-life balance issues. Even small team scheduling can tie up a manager's time for hours and a manager with around 30 employees can be tied up for days, if not weeks, balancing paper and pencil schedules to make sure the business requirement is met.

Resistance to flexible working strategies due to increased complexity is removed with Schedule24 Resource Manager's powerful scheduling and monitoring tools that simplify and speed up the scheduling process.

$\Rightarrow$ **Define Scheduling and Deployment Strategy**
Powerful automated scheduling wizards enable the manager to generate schedules in under 30 minutes. If new ways of working is being considered, schedule templates based on industry practice can be used to get started. For more experienced managers, the Shift Pattern Designer, which supports over 30 business and scheduling rules, will give total control over customizing schedules.

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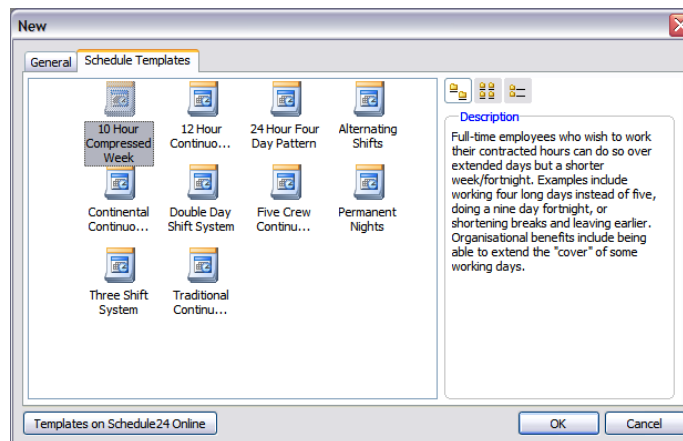
⇒ **Fast responsive scheduling**
Schedule24 Resource Manager supports both structured and unstructured scheduling styles. Managers that are able to deliver structured scheduling will benefit from greater automation, longer term planning and improved compliance, with working hours and rest periods. Sometimes unstructured scheduling has to be carried out where the business manager is totally dependent on staff availability, or where staff are matched to job orders. Powerful scheduling tools make even this style of scheduling faster.

⇒ **Extend forward planning**
The longer the schedule range, the greater and easier planning becomes. Schedule24 Resource Manager's continuous scheduling calendar and navigation tools place no constraints on how far you want to schedule into the future. Training arrangements and vacation no longer get forgotten or misplaced. Staff shortfall can be identified in good time and alternative arrangements scheduled. Public holiday flagging means you don't get caught out on those extended weekend or holidays.

⇒ **Combine schedules for flexible working**
Business managers that need different scheduling arrangements for different teams, or even individuals, can easily manage this kind of complexity with the Team Manager. One view displays all the staff and the different schedules they work. Changes are made by a simple drag-and-drop operation which recalculates the schedule and updates the schedule display.

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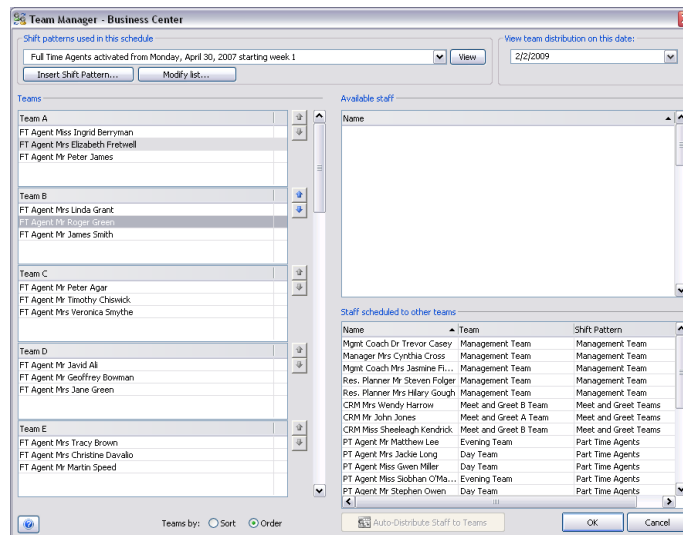
BUSINESS SCENARIO: HEALTHCARE FACILITY

Background: A facility providing 24 hour healthcare scheduled and deployed nurses on a rotating shift basis to deliver care to their patients. It was decided to change the working practice in favor of a new schedule that some of the nurses with childcare responsibilities were unable to work.

Problem: Matching business goals with work life balance needs

The new shift system involved a rotating 10 hour night shift, and two 8 hour day shifts. This replaced the old 12 hour night shift. Some nurses worked permanent night shift 2 or 3 times a week which allowed them just enough time when they finished at 8 am to go home, feed and dress their children and take them to school. Having to meet contracted hours meant that all nurses were required to work the new rotating schedule including the nurses with childcare responsibilities. They were unable to work the new shift system and would have to stop working.

Solution: Flexible working

⇒ **Review proposed working arrangements**
The manager of the healthcare facility did not want to lose experienced nurses from the staff list and was sure an alternative scheduling arrangement could be considered. Using the Shift Pattern Designer, the manager combined the new scheduling system with the old 12 hour night shift working for the nurses with care responsibilities. It had only had taken 30 minutes and copies of the modified schedule were submitted for approval.

⇒ **Innovate and design new ways of working**
The schedule although covering the essential hours was not approved by senior management. It was believed nurses working permanent nights were at a disadvantage that could affect the provision of healthcare, this included not being able to meet with the other professionals involved with the patient, unable to participate in links with the community, unable to deal with a full range of nursing activities, not supervised sufficiently by more senior nurses, and did not benefit from the experience and knowledge of their colleagues. The manager had to think about a totally new approach to this, in order not to lose good nursing staff. Using the scheduling wizard he was able to submit a schedule the same afternoon that included staggered day time shifts 9.30am-3.30pm on weekdays, and longer hours at weekends on nights, to ensure contractual requirements were met. The nurses with care responsibilities could work that schedule. The following morning senior management could see that it addressed their concerns about cross-training and supervision, and so was approved.

SAVE TIME, AND REDUCE THE COST OF PLANNING SCHEDULES

Business managers understand that forward planning creates a more prepared and proactive business, able to fulfill opportunity and respond to change. Trial and error scheduling using paper and pencil can be expensive. It quickly turns any endeavour into a time consuming business and trying to do more is fraught with complexity and the prospect of diminishing returns. Schedule24 Resource Manager provides all that is necessary so management skill isn't wasted in time consuming consideration of endless possibilities that deliver poor solutions.

⇒ **Automate scheduling tasks**
Powerful automation scheduling wizards reduces the complexity of thinking about scheduling patterns. Options include split shift working, work day to day-off ratios and distribution of staff across shifts.

Powerful, comprehensive automation wizards mean structured scheduling strategies can be created and evaluated in less time than it takes to draw up your next schedule.

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⇒ **Shift Patterns Design**
For more experienced business managers the Shift Pattern Designer gives complete control over customizing shift patterns that can then be used to scale and automate staff scheduling. Traditional shift patterns can be combined with new models of working patterns to deliver more flexible scheduling where a department or business unit has people with different working arrangements. Over 30 business and scheduling rules can be applied, including shift duration and juxtaposition, and "orphan" days-off where required. Rest periods, minimum, average and maximum working hours can be designed into any scheduling strategy. Increased or reduced cover at different times of the day or week can also be factored into a shift pattern design.
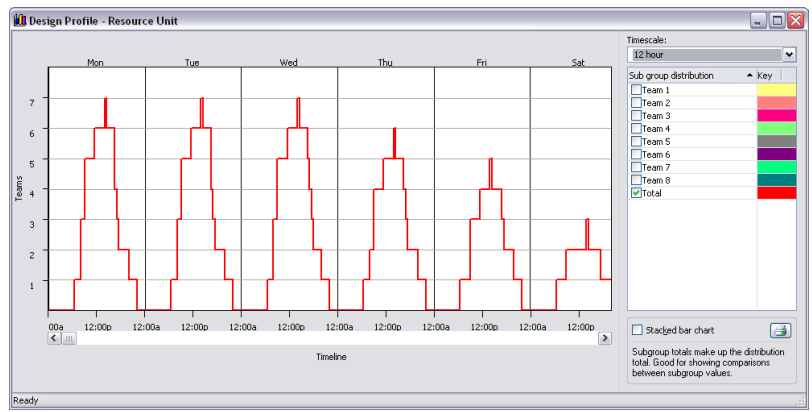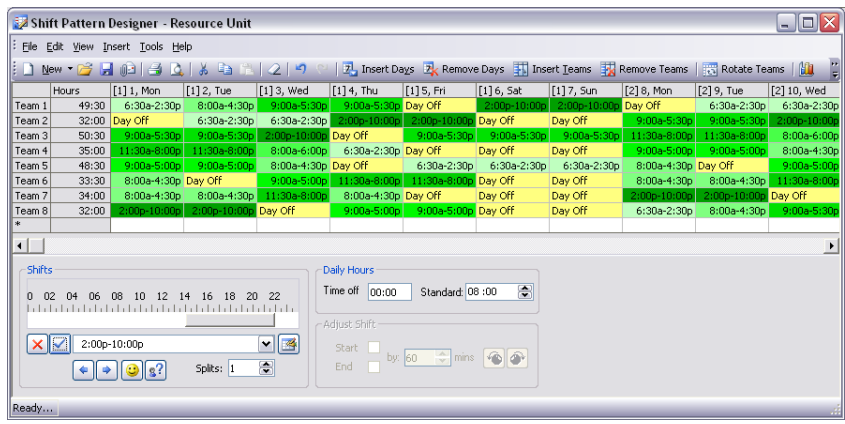
For more experienced business managers the Shift pattern designer supports over 30 business and scheduling rules and gives total control over customizing shift patterns for a wide range of scheduling problems.

⇒

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⇒ **Supports leading consulting models**
Shift pattern design environment will support both vertical and horizontal shift pattern flexibility and The Core Density Model ^{SM}.

⇒ **Reduce the cost of scheduling with web schedules**
The actual cost of publishing and distributing schedules is often overlooked, not just in time, but also the cost of misplaced and late schedules with incorrect information. It is not uncommon for staff to turn up for work on the wrong day or time, or take the same day off, leaving a shortfall in staff cover. Copying modified versions of the previous week's schedule is largely unproductive and inefficient. Printing and copying schedules can be totally eliminated with Schedule24 Resource Manager web wizard. This four step wizard quickly converts scheduling and personnel information into a web schedule. Information content can be customized, and cross referencing of employee assignments and unavailability status are automatically hyperlinked. Anyone in the organization can have convenient access to scheduling information.

Publishing hyperlinked schedules to the web saves time and everyone in the organization has fast and convenient access to scheduling and contact information.

⇒ **Deliver scheduling information fast.**
The faster that scheduling information can be communicated to employees, the more efficient and responsive the business enterprise will be. Traditional scheduling methods are slow and unable to respond to short-notice change like sickness or compassionate leave. With Schedule24 Resource Manager staff schedules can be quickly updated when there are changes in the business requirement. Email is the most efficient way of communicating changes so that everyone is kept up to date. Email content can be customized to include shift details, assignment information, unavailability status or memo details. Everyone in the business can be given detailed notice of shifts and proposed work schedules over any date range. It is totally automated and no editing of email content is necessary.

⇒ **Use your favorite mailer.**
It is easy to configure Schedule24 Resource Manager to use your own favorite mailer using a simple four step wizard.
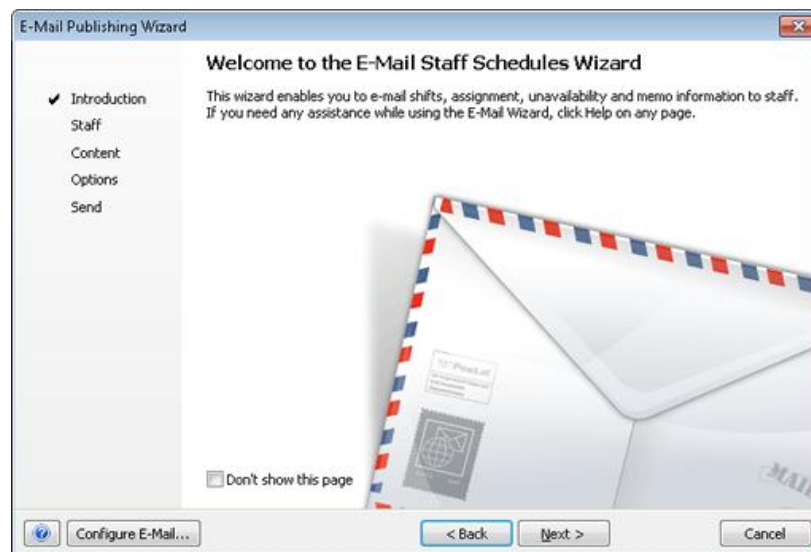
Staff can be emailed their schedules with attachments

⇒ **Customize your email content**
Checkbox options enable you send information about shifts, breaks, availability status, assignments, and memo information in addition to emailing attachments along with the email schedule.

BUSINESS SCENARIO: LAW ENFORCEMENT AGENCY

Background: A law enforcement agency delivered 24 hour services including emergency response to a large densely populated community area, served by a busy airport. Paper and pencil scheduling was used by various departments across a wide range of operations involving different departments having different working arrangements.

Problem: Delivering good and timely schedules

Keeping track of workforce information scattered over different locations was a headache for operations Sergeant Jenny Costello. Schedules were disorganized, with each department having its own way of doing things. Sickness and vacation were dealt with by divisional administration, training and court process by sub-divisional administration, and shifts and scheduling by whoever got caught with the job. She'd had enough.

Solution: Coordinate forward planning

⇒ **No training and no specialist IT support required**
Sgt Jenny Costello installed Schedule24 Resource Manager on a spare computer in the Charge Room and by lunchtime had all the staff in her section of over 50 officers entered into the system. Two hours later she had worked out the main operational schedules and was publishing them into the middle of the following month – previously the best they got was 3 days.

⇒ **Have everything you need in one location**
Soon officers were asking if she could book their vacation. She did so with plenty of warning. Then followed the training requests which were now easily recorded in the schedule. The court bookings were just as easy with no double bookings, which saved money. Planning improved and overtime decreased. Sickness still happened but records were now so up to date that Jenny Costello became the most reliable source of this information for other departments.

⇒ **Coordinate action**
Schedule24 Resource Manager was then transferred to Division along with three other workstations and now all scheduling is done from a centralized location for the whole division. Forward planning over two years for over 600 officers has now become a matter of routine, and schedules are pushed out to the agency web so anyone can get access to their schedules and assignments. Commanders have enough management information to make sure it will never go back to what it was… and Sgt Jenny Costello? Well she didn't get promoted, but she's just been emailed her schedules which tell her she's back on operations and she's happy with that.

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BUSINESS SCENARIO: CORPORATE PRODUCTION LINE

Background: A large corporate production team making popular confectionary products had a large number of staff working a basic shift but involving a rotating day-off pattern made more complex by a day-off accrual system.

Problem: Managing the high performance workplace

Coordinating a regular pattern of rest period scheduling.

Solution: Structured scheduling and management reporting

⇒ **Manage large staff deployments effectively**
Schedule24 Resource Manager was deployed in 6 locations to manage workforce deployment at various stages of a corporate production facility. Up to 200 staff were managed at each location, working fixed shifts, with rotating days-off and rest periods. The deployment cost for each day was over $15,000 and poorly coordinated scheduling and tracking of rest periods increased these costs. Having all the information accessible in each location made this task much easier and more accurate. Staff could be tracked by job title and position in production and management reporting maintained a day-off balance.

⇒ **Ensure consistency of operation**
Schedule24 Resource Manager set the standard for monitoring working hours and days-off scheduling. Management information was presented in a standardized format so comparisons could easily be made. Days-off scheduling was designed into the schedule for long term planning, but could be modified and changed at short notice. Staff could continue to exercise flexibility for changing a set number of rest days at short notice and each person's day-off balance was easily accessible.

SAFEGUARDING BUSINESS PROFITABILITY

Staff and employee costs represent one of the few business costs over which a resource manager can have direct control. Most managers are familiar with uncontrolled staff costs associated with overstaffing and spiraling overtime. They may be less aware of the cost of poor scheduling and confused deployment. Getting the right numbers is not sufficient. Balancing the distribution of staff is equally important, especially where several job roles are required to provide effective team support.

Resource managers are also aware of the importance of keeping expenditure costs below the revenue income which the business generates. Managers normally react to financial analysis to stay profitable and the reactive nature of this kind of process can lead to a cost-cutting rather than a cost-benefit approach to business. The manager who understands the relationship between staff scheduling and business delivery can contribute a great deal more. Schedule24 Resource Manager enables the manager to manage staff costs much earlier in the process and at the point when they are committed. Turning a reactive business enterprise into a more proactive one is much easier when detailed cost management is at hand.

Managers are familiar with straightforward hourly and daily rates but increasingly find these to inflexible for delivering services over longer working hours that may involve premium or variable rates. Overtime to compensate staff or averaging price peaks and troughs to decide client costs may help, but something more flexible is needed. With Schedule24 Resource Manager budget management, variable rate cost calculation is done automatically as you schedule and detailed cost breakdowns can be displayed instantly.
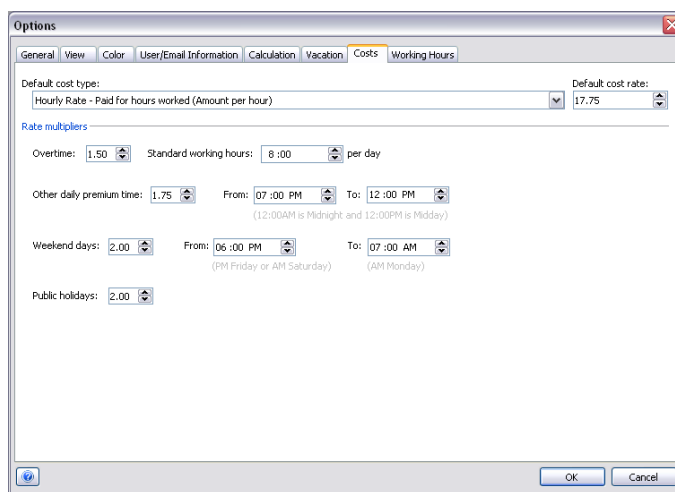
Automatically calculate variable costs across an employee's working hours.

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⇒ **Calculate variable costs automatically**

Schedule24 Resource Manager enables different staff compensation plans and variable rates across different time periods to be calculated automatically. Options for staff compensation types include hourly, daily or salaried staff amortized over the year. Variable rates include basic, overtime, premium, weekend and public holiday working. However complex schedules may get, calculations are carried out automatically to provide the manager with advanced cost information.

⇒ **Track staff costs or price business services**

Awareness of the costs of staff scheduling to deliver business requirement is enhanced. Managers are more effective because they are able to see the bigger picture more easily and accurately. Cost management improves the capability to create price tariffs that make business sense. For example time ranges can be customized for premium hours working that attract higher rates. This flexibility means customers who do not require premium levels of service are not turned away by the increased costs based on calculations for customers who do.

	Total Costs 365 days	Mon 02 Feb 2009	Tue 03 Feb 2009	Wed 04 Feb 2009	Thu 05 Feb 2009	Fri 06 Feb 2009	Sat 07 Feb 2009	Sun 08 Feb 2009	Mon 09 Feb 2009	Tue 1 2009
Salesperson Miss Siobhan O'Malley	$20,900.00	8:00a-6:00p $100.00	Day Off	8:00a-6:00p $100.00	Day Off	Day Off	8:00a-6:00p $100.00	8:00a-6:00p $100.00	8:00a-6:00p $100.00	8:00a $100
Salesperson Mr Stephen Owen	$20,900.00	8:00a-6:00p $100.00	8:00a-6:00p $100.00	Day Off	8:00a-6:00p $100.00	8:00a-6:00p $100.00	Day Off	Day Off	8:00a-6:00p $100.00	Day
Salesperson Mr Ian Pearce	$20,900.00	8:00a-6:00p $100.00	Day Off	8:00a-6:00p $100.00	Day Off	Day Off	8:00a-6:00p $100.00	8:00a-6:00p $100.00	8:00a-6:00p $100.00	8:00a $100
Finance Officer Mrs Jessica Cross	$42,000.12	7:30a-4:00p $115.07	7:30a-4:00p $115.07	7:30a-4:00p $115.07	7:30a-4:00p $115.07	7:30a-4:00p $115.07	Day Off $115.07	Day Off $115.07	7:30a-4:00p $115.07	7:30a $115
Accountant Mrs Donna Frost	$35,000.07	9:00a-5:00p $95.89	9:00a-5:00p $95.89	9:00a-5:00p $95.89	9:00a-5:00p $95.89	9:00a-5:00p $95.89	Day Off $95.89	Day Off $95.89	9:00a-5:00p $95.89	9:00a $95.8
Accountant Mrs Elizabeth Gallegos	$29,999.91	9:00a-5:00p $82.19	9:00a-5:00p $82.19	9:00a-5:00p $82.19	9:00a-5:00p $82.19	9:00a-5:00p $82.19	Day Off $82.19	Day Off $82.19	9:00a-5:00p $82.19	9:00a $82.1
Salesperson Mrs Gill Spencer	$22,990.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	Day Off	Day Off	Day Off	2:00p-12:00a $110.00	2:00p $110
Salesperson Mr Hugh Thompson	$22,880.00	Day Off	2:00p-12:00a $110.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	Day Off	Day Off	Day Off	2:00p $110
Salesperson Miss Rachel Tinsley	$22,990.00	2:00p-12:00a $110.00	Day Off	Day Off	Day Off	2:00p-12:00a $110.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	2:00p-12:00a $110.00	Day
Salesperson Miss Angela Tobin	$20,900.00	8:00a-6:00p $100.00	Day Off	8:00a-6:00p $100.00	Day Off	Day Off	8:00a-6:00p $10	8:00a-6:00p	8:00a-6:00p	
Salesperson Mrs Carol VanAllen	$20,900.00	8:00a-6:00p $100.00	8:00a-6:00p $100.00	Day Off	8:00a-6:00p $100.00	8:00a-6:00p $100.00	Day			
Transport Manager Mr Geoffrey Bowman	$30,500.12	7:30a-4:00p $83.56	7:30a-4:00p $83.56	7:30a-4:00p $83.56	7:30a-4:00p $83.56	7:30a-4:00p $83.56	Day $83			
Driver Mr Alan Bruck	$22,090.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	Day		$80.00	$80.
Driver Mr Phillip Bunting	$21,920.00	Day Off	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	Day Off	Day
Driver Mr Trevor Casey	$21,840.00	2:00a-10:00a $80.00	Day Off	Day Off	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a $80.
Driver Mr Timothy Chiswick	$21,840.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	Day Off	Day Off	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a $80.
Driver Mrs Tracy Connors	$22,000.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	Day Off	Day Off	3:00a-11:00a $80.00	3:00a $80.
Driver Mrs Jasmine Lopez	$21,920.00	Day Off	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	3:00a-11:00a $80.00	Day Off	Day
Driver Mr John Lovell	$14,480.00	3:00a-11:00a $80.00	Day Off	Day Off	Relief Driver	Relief Driver	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a-10:00a $80.00	2:00a $80.
All All All Count	17885	49	49	49	49	49	49	49	49	49
All All All Hours	96311:00	365:00	305:00	305:00	305:00	305:00	130:00	130:00	365:00	305:0
All All All Costs	$1,093,627.00	$3,791.71	$3,191.71	$3,191.71	$3,191.71	$3,191.71	$2,186.71	$2,186.71	$3,801.71	$3,20

Callout (overlaid on Sat 07 Feb column):

Salesperson Miss Rachel Tinsley: is budgeted hourly at a rate of $10.00 per hour From 2:00p to 8:00p BASIC weekend applies for: 06:00 hrs @ $10.00 x 1 = $60.00 From 8:00p to 12:00a basic PREMIUM weekend applies 04:00 hrs @ $10.00 x 1.25 = $50.00 TOTAL = $110.00

Customized and dynamically updated individual and summation costs can be displayed for informed decision making before committing resources.
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⇒ **Monitoring the cost of scheduling strategy**

Getting it right first time is a sought-for management skill. Keeping it right is even more important especially when business changes and different approaches need to be considered. Schedule24 Resource Manager makes it easy to project costs based on current scheduling strategy. The need to avoid overspend is self evident but underspend also carries risks. Both can be regularly monitored to avoid inefficient year-end "cost-cutting" or "rush-to-spend" balancing acts. Projecting the costs of current scheduling activity and viewing the results over a year or more will identify waste or "penny-pinching" in good time to achieve a more balanced cost effective business operation. Staying in budget with Schedule24 Resource Manager becomes routine but without the hard work.

⇒ **Cost breakdown reporting and analysis**

Schedule24 Resource Manager enables managers to create a great deal of information about costs that can be useful for additional business processes. Advanced reports give detailed breakdown of employee working hours, cost rates and financial information. This can be analyzed by individual, department and job title categories over any date range. Intuitive guesswork is reduced and past records can instantly be recalled to create meaningful reports for future planning. All information in advanced reports can be exported for further analysis using Microsoft Excel or even as a Microsoft Word document so that you can use your own business logo and formatting styles.

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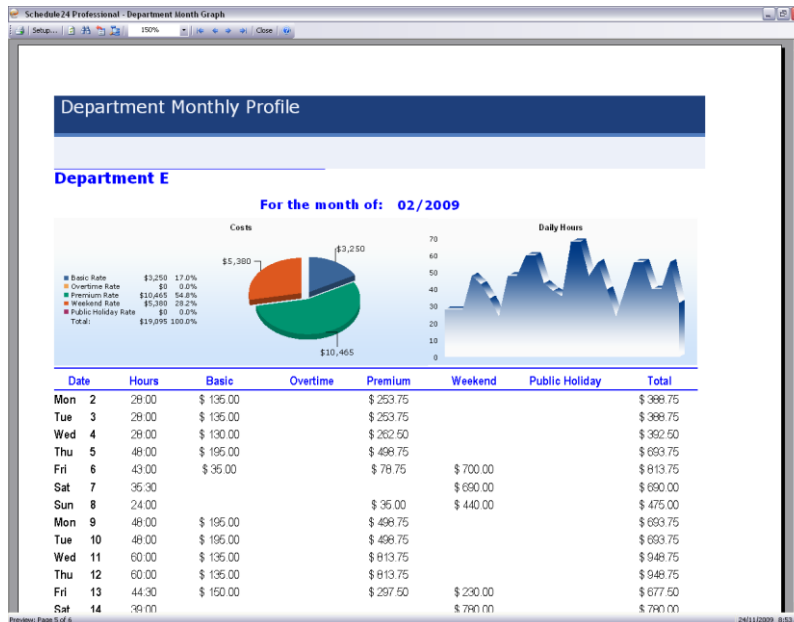
REDUCING RISK

⇒ **Staff working hours and rest period thresholds**
Track staff working hours and rest periods using automated Active Conflict Monitoring (ACM) control. Auditing of working hour and rest periods during schedule planning ensure you need never publish non-compliant schedules again.

⇒ **Ensure staff wellbeing**
Avoid excessive and unplanned overtime which reduces staff rest and moral and makes the business less productive. Daily and weekly thresholds can be monitored for individual and groups to ensure sufficient daily and weekly rest periods are being scheduled.

Defining staff working time profiles is a simple and effective step to ensure better planning and a more productive workforce

⇒ **Check staff availability**
Flexible working requests can be considered and actively supported using ACM control.

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BUSINESS SCENARIO: DRIVE-THRU DRUG STORE

Background: A retail drug store manager knew car parking in the area was a big problem for shoppers and wanted to make it easier for customers to use the drug store. The manager wanted to open a drive-thru drug store on similar lines to popular fast food outlets, so people could purchase and pick up orders without leaving their car.

Problem: Does a new way of doing business make sense?

Scheduling a team of suitably qualified staff beyond traditional working hours and at weekends was key to the success of the new business initiative. The cost of deploying a flexible staff scheduling rota that matched a varied consumer demand through the week was needed.

Solution: Create and cost a schedule that matches consumer demand

The manager was able to create a schedule that made sure qualified dispensing staff had adequate support for the store to be managed efficiently, whilst keeping waiting times for customers to a minimum. This was achieved by combining different staff schedules for overlapping shift periods at the time of greatest demand.

⇒ **Design an effective scheduling strategy**
A structured approach to the scheduling of the various qualified staff enabled the manager to define the minimum requirements to staff the store efficiently. Qualified dispensing staff did not need to overlap shifts, but assistants did. Both dispensing staff and assistants worked different schedules side by side. This allowed more flexibility in deploying more assistants at busier times.

⇒ **Monitor the costs of the scheduling strategy**
Once the scheduling strategy was established, it was easy to use Schedule24 Resource Manager's budget manager to calculate an accurate breakdown of staff costs for each day of the business operation. It was a simple matter to project the costs of the first two weeks over a period of three months and this indicated further modifications were needed to the schedule. After three months the budget was on target and so the schedule costs projected over a further eighteen months. It was clear that additional staff, scheduled later in the evenings and over the weekend, would improve the service even further and deliver profitable business.

IMPROVED DECISION MAKING

The manager that can propose alternative ways of working demonstrates consideration and foresight. A workforce that has been consulted will be more compliant and more likely to reach its goals. Paper and pencil is not the means for creating these conditions.

Schedule24 Resource Manager's integrated analysis tools are easy to use during the scheduling process. Dynamically updated cover counts display the availability of staff each day to make sure the numbers are right. The display can be customized to include staff headcount, total staff hours and staff costs. Distribution of available staff over any date range can be analyzed by shift type, job title, department, and by schedule team. For the manager needing a complete overview of workforce deployment, whether past, present or future, these two tools combine to deliver true enterprise-class management capability.

⇒ **Planning ahead**
A major factor in better decision making is the ability for planning ahead. Forward planning with Schedule24 Resource Manager is easy with its continuous scheduling calendar. Color mapping of weekends and customized public holiday dates helps navigation through the year or even longer. This makes it easy to book staff vacation, arrange training schedules or any scheduling activity alongside shifts and day-off planning.

⇒ **Managing employee unavailability and absenteeism**
The biggest compromise for any business scheduling strategy is reduced staff availability caused by training commitments, vacation, sickness and other types of leave. Tracking this information is automatic and can be recalled and displayed in statistical format. Vacation is tracked against entitlement, including vacation scheduled in addition to actual vacation taken. Advanced reporting also includes monitoring vacation status by department and job title. This gives plenty of warning of areas that may be subject to disproportionate vacation applications as the year comes to an end. Negative balances can be tracked if the occasion demands. All non-working staff can be displayed in the cover count for each day and staffing level indicators displayed for overstaffing, understaffing and acceptable staffing levels.

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Viewing budget costs alongside working hour totals, staff availability and staff distribution profile means different kinds of information can be analyzed in its proper context.

⇒ **Coordinating action with assignment scheduling**
Once your scheduling strategy is in place it is easy to schedule additional information about assignments or tasks to individuals or groups of staff. Multiple assignments can be scheduled to staff for each shift. Each assignment is automatically tracked and cross-referenced to individual staff, however many changes are made. The system checks and displays any conflicts when trying to schedule assignments to anyone that is unavailable. Sending email schedules can provide staff with much more information than just their schedule and can include a comprehensive summary for coordinated action with other team members.

Statistical information can provide a range of information about individual, job title and team categories.

Analyzing the overall distribution of staff by categories enables comparisons to be made giving the bigger picture.

⇒ **Analyzing staff distribution**
Viewing the staff distribution graph by shifts can reveal modifying existing shift times could solve the problem. A business that is designed to operate production or services at constant levels is unlikely to want peaks and troughs in staff deployment. Conversely, a business having to meet unpredictable demand will want to avoid having unvarying schedules that cause both overstaffing and understaffing.

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BUSINESS SCENARIO: VIDEO RETAIL STORE

Background: A proprietor of a chain of video stores required responsible assistants to manage the rental and purchase of videos and games. Store hours were from 9am-9pm each day of the week including weekends. Thursday, Fridays and Saturday were particularly busy times. Staff attitudes were very important, as was their flair and knowledge of customer behavior, which guided the manager in creating special and promotional offers to generate business.

Problem: Managing a safe and responsible workplace

Safety in the workplace was important to the manager who required a male member of staff to be present and avoid a female assistant working alone. The biggest difficulty was maintaining a schedule for a large group of part-time staff who sometimes didn't know their availability until a few days before and sometimes less. Because the manager needed staff to call upon in the event of "no shows", a large pool of people, mainly part-time workers, had built up on the scheduling list. Scheduling was done using a spreadsheet.

Solution: Scheduling for effective teamwork

Once the current scheduling information was put into Schedule24 Resource Manager it was much easier to see where improvements could be made:

⇒ **Forward planning with part-time staff**
It soon became clear that there were staff willing to work more hours, provided they had adequate notice for when they would be required. It was easy to create a schedule which gave more time for assistants to plan their work commitment. It became unnecessary to have so many staff on the scheduling list. Better forward planning and longer notice made suitable staff more committed to the scheduling plan and the list was reduced by 40%.

⇒ **Moving toward structured scheduling**
With a reduced scheduling list it was easier for the manager to create a schedule for senior and junior staff throughout the week, and for those having preferences for weekend work. It also ensured no female staff worked alone. Working hours remained consistent and when staff changes were needed they knew who to arrange this with. Scheduling time was significantly reduced and the team was well coordinated.

INFORMATION SHARING WITH SCHEDULE24 RESOURCE MANAGER

As a business process Schedule24 Resource Manager sits between traditional HR and Payroll information systems. Staff information and scheduling information can be exported to either of these systems. This saves time re-keying data and provides the means to use the same information in different ways for different purposes, including:

⇒ Import and export contact and personnel information with existing HR and payroll systems, including QuickBooks and MYOB, to keep staff information and their scheduling details coordinated and up to date.

⇒ Export all scheduling information, including personnel records, shift times, assignment information and activity.

⇒ Export detailed cost breakdown from management reports to Microsoft Excel for further financial analysis.

⇒ Export schedules as an Microsoft Access database for customized forms and business processing.

⇒ Scripting facility to automate import and export record formats with other software applications with which information is regularly shared.

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BUSINESS SCENARIO: NON-PROFIT MAKING ORGANIZATION

Background: A non-profit making charitable organization deploys care workers delivering a wide range of services across a number of separate facilities, helping people with learning disabilities.

Problem: Coordinating care professionals

Small, active and multi-skilled teams are not easy to schedule especially when trying to coordinate different skills at different times to deliver support and help where it is needed. Many non-profit making organizations often do not have the budget for anything more than have paper and pencil for scheduling.

Solution: Streamlining and coordinating business information

Professional care delivered by non-profit making organizations means making sure value-for-money choices are at the forefront of business:

⇒ **End to end management for committed teams**
Time taken with administration, office work and scheduling means less time spent with those benefiting from their help. With Schedule24 Resource Manager the manager, can organize and deploy a whole regional team from one location. Scheduling, assignments, and contact information can be rapidly updated and accessed on the web for those with several facilities to visit. Budget management keeps automatic track of scheduling costs and is easily shared with larger administration centres managing payroll. Long hours collecting information for management reporting and payroll are virtually eliminated.

⇒ **Affordable enterprise-class scheduling**
Non-profit organizations benefit from Schedule24 Resource Manager desktop solution in many ways. No specialist training or IT support is required to get up and running and discounted pricing for non-profit making organizations guarantees value for money.

SYSTEM RECOMMENDATIONS

System requirements for Schedule24 Resource Manager:

⇒ Microsoft Windows XP SP3 or later, Vista, Windows 2003 Server, Windows 7 & 8.

⇒ 800 MHz processor or higher

⇒ 512 MB of RAM (1GB RAM recommended)

⇒ 450 MB of available hard disk space

⇒ Super VGA (1024 x 768) or higher resolution

Additional Items or Services

Additional items or services are required to use certain features:

⇒ For certain integration functionality, including Export to Excel and Word, Office Professional Edition or later is required.

Additional Resources

Visit http://www.intellicate.com where you can find more information about our workforce scheduling solutions.