



Schedule Optimizing Software

## Update for SOS users

Volume 01

### Looking for ways to improve employee satisfaction?

#### Consider Employee Credits.

Employee credits (Credits) is a new SOS function for tracking and/or distributing a job benefit amongst the employees. Credits can be used to recognize positive behavior. For example, you could allow days-off or other tangible awards available to employees based on their 'credit balance' from such events as:

- Perfect attendance
- Volunteered overtime
- Productivity suggestions

At its most basic level, the Credits function is a way of tracking employee performance and ranking employees in a queue based on criteria that changes over time. Positive credits can be used to offset an absentee event or equalize overtime. Some customers are using Credits to ensure that the demand for forced overtime doesn't fall on the same employees repeatedly. Others use it to distribute voluntary overtime, with its increased pay, more equitably to all employees. By giving employees a credit for overtime worked, SOS



automatically moves them down the queue relative to other employees.

Credits can be used to shield employees from the impact of an undesirable job assignment after they return from an excused absence such as:

- Illness
- Maternity leave
- FMLA
- Jury duty

Credits can be equalized for such employees to keep their overtime in step with others when they return.

Managing Credits is an example of an HR task that would be a nightmare if done with spread sheets or by hand. However, this task is fully automated and easily managed within SOS where labor allocation, absences, automated overtime, your rules, and your policies all intersect.

#### Consider Vacation Relief

Not all jobs are created equal. Some are more desirable than others. Your employees can use this to their advantage when someone, assigned to one of those more desirable jobs, goes on vacation.

Vacation Relief is a simple feature of SOS that enables employees to bid on those jobs. Working with the Vacation Scheduling module, a manager allocates or withholds



jobs for Vacation Relief.

Using the Kiosk, employees can view vacation slots that are open on their shift. The employee can then select a listed job, one day at a time, and submit a request for "Vacation Relief". When the schedule is generated for that period, eligible employees are automatically assigned the Vacation-Relief jobs - according to your work rules (for example based on seniority).

If your facility is not currently using Credits or Vacation Relief, they're worth looking at for the boost in morale your employees will experience.

#### Hint

SOS Reports are generated in HTML format. They come up in your internet browser. This means that if you save the report to disk, you can then open it up in a spreadsheet program such as Excel.



## Optimization

When a scheduler has to juggle vacations, absentees, too few volunteers, and a labor demand that changes with each shift, they have a tough job. Even more difficult is applying job assignment policies in a way that is impartial and consistent. One change can cascade into many others, sometimes with unforeseen consequences. For the manual scheduler, this is the major problem. Using SOS, optimization makes all the difference in the world.

In a classic case, you have only six or eight workers qualified for a certain position. You have three of these positions to fill across the shifts and two of the regular jobholders are absent. Some of those qualified may not prefer this job assignment or shift. This situation may be duplicated for multiple jobs on the schedule. In order to man the lines and minimize the need for overtime where possible, optimization recognizes these situations and can reserve the most

junior qualified employees from other possible assignments so that these critical jobs are filled. This may mean that a particular employee does not get his or her preferred job- but it also means that, given the range of skills among the employees in your facility, they are all being utilized in an optimum manner.

Optimization can be used to achieve different objectives for different groups of employees. It is not a one-size-fits-all feature. There is much more to it than just minimizing overtime. Some jobs pay more than others. Some jobs start earlier than others even if on the same shift. Certain employees will want to be assigned to the highest paying job, regardless of start time or shift, while others will prefer the earliest start time and shift - as long as they don't earn less than they would on their bid job. For each employee, optimization means working through the job list to make the best possible selection according to each employee's preferences and job qualifications. SOS does this automatically.

Finally, since SOS retrieves the latest employee preferences from the Kiosk before each schedule run, optimization is always in step with their preferences and requests.



## New Screen Scraper

Have you ever wished you could take the contents of a listing and just send it directly to a spread sheet? Now you can, with the new Screen Scraper in SOS. It works with any window in the application.

Try this when you work with job or employee information. Once you have populated the window with data, select **File** from the menu bar, then select **Copy Screen to XLS**, or, use the new hotkey **F12**. Excel comes up instantly with all the data displayed in rows and columns, organized just as you see it in the window. (Yes, you must have Excel installed on your system.)

If the window contains many rows of information, remember to scroll down to the last record. This way, the Screen Scraper will direct all the records to Excel rather than only those rows that first come up.

It even works for windows that include more than one list. The Screen Scraper will display the contents of two or more lists in separate regions on the spread sheet.

The Scraper is a convenient way to review and error-check the data in SOS. It enables you to capture a selection of data without having to build a custom report.

All of the primary windows in SOS include a Query tab. Use this feature to select a subset of data prior to sending it to Excel. Now, you have a very convenient way to organize data for quick reporting and review.

The Screen Scraper is a utility that is available to all users when they download the latest version of SOS using the WebClient.