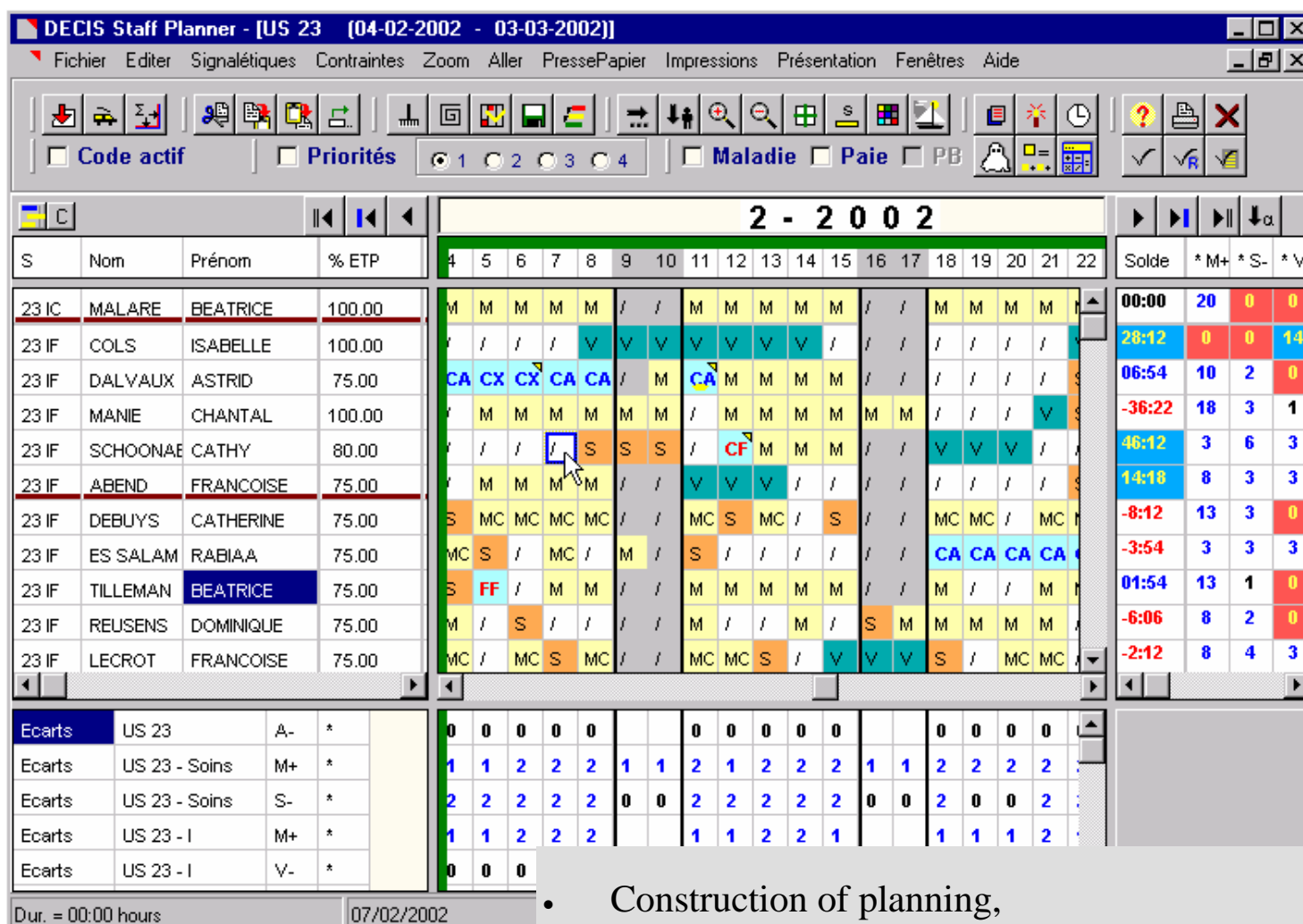# StaffPlanner

The Computerised Planning

Simplify your life ...
*and improve that of your team.*

- Construction of planning,
- Follow up on leave, illness, medical certificates,
- Manage interim, student and mobile employees,
- Manage minimum staffing,
- Interpretation and transfer of the timetable to « salary »,
- Creating reports to measure. (data warehousing)
- Integration and interpretation (smoothing) of time clock data (punching)
- Access control,
- Suitable for small and large companies (from a hundred up to several thousand employees),
- Most of the popular data bases are supported: MS-SQL server, Oracle, Sybase, Informix.

Decision Engineering SA
Tervueren Lane 128/4,   B1150 Brussels
Tel: 32-2-240.07.97   Fax: 32-2-240.07.91
Contact: Denis Dresse - Email: denis.dresse@decis.be - Site: www.decis.be

Ergonomic Timetable Codes

A sample card represents in an ergonomically fashion the different timetable codes available within a planning unit. The planning timetable, which has an ultra fast response time (the data is loaded in the central memory), offers the usual tools like "copy-paste". For a part-time employee the representation in the time table can be interpreted according to its full or proportional value. e.g. Mark works a 75% shift, his morning duty (M) could be a standard code of van 7:36 hrs or proportional to his status, resulting in a morning of 5:48 hrs which starts at a given time but finishes early.
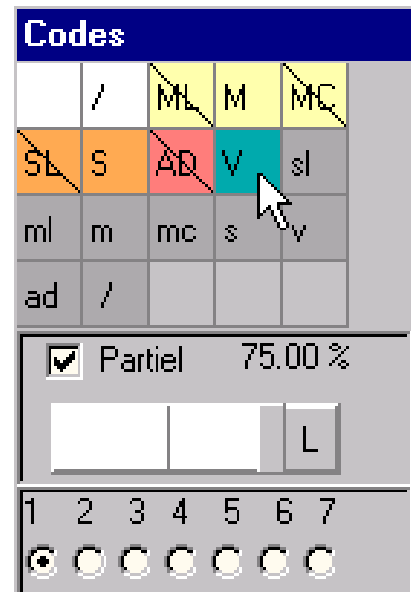
Flexibility of the Timetable Codes

Identical timetable codes can be used in different planning units, but their meaning can differ. e.g. the morning shift (M) in the "Paediatric unit" could be 07:30-15:36, whilst the same code in the operation wing could mean 08:30-16:36 with a coffee break of 30 min. Also the day type can be of influence: e.g. a morning shift (M) could be defined differently if it is a weekday or a weekend day. This flexibility enables us to limit the number of necessary codes to be managed within the organisation.

The Periods

The planning is managed per period. The definition of these periods is completely free and may vary in time. e.g. A period could be 4 weeks, a month, a year. One could even have a period of 4 weeks followed by one of 5 weeks. These periods have a specific status and a specific colour, which enables us to differentiate between the different agents:

- *Period under construction (green)* : future planning for which the desiderata, e.g. the requested leave, can be introduced several months in advance.
- *Active period (yellow)* : the planning has been posted and is being implemented by the staff. Every modification is tagged by a small yellow triangle. The original code stays available.
- *Finalised period (red)* : the rectified planning is send by the head of the unit to the Human Resources department. Only human resources staff can modify the codes (tagged by a small red triangle). The pay will be calculated according to the resulting red periods.

The Balances

The period starts for each employee with the opening balance and closes with the closing balance. This balance coincides with the accumulated excess or shortage of hours put in during that period, this relative to the number of hours to be put in during that period according to his status. The balances form a chain linked from period to period.

Management of Sick Leave

To each timetable code belongs a specific "Sick Leave" code. e.g. : to the (M) code (Morning 08:00–15:36) belongs the (m) code (Morning Sick 08:00–15:36). During the planning a swap from one to the other is established by a simple mouse click on the code concerned. The human resources department can register the medical certificate. This code also appears on the planning grid of the unit. Thus one can verify at a glance if a sick leave has been covered by a medical certificate or not.
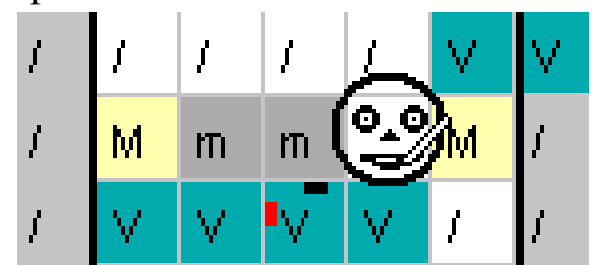
Managing the cycles.

Cycles of timetable codes can be defined over one or several weeks. This enables the user to assign a regular timetable to a selected number of employees. e.g. the first week only mornings (M) and the following week only evenings (S). This cycle can be repeated over large periods starting from a starting date.

Complete management of holydays

- The kinds of holidays are unlimited : fixed holidays, variable ones, fixed conventional, free conventional, unpaid, educational leave, end of career, …
- The notion of validity of postponement for each kind of leave : "leave to be taken within 6 weeks", "to be taken before the following date: … / … / … , …

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- Individual leave cards per employee offer an overview of the taken and remaining leave.
- A leave days template makes it possible to introduce all the fixed holidays and to define a leave budged common to all employees.

Automatic Planning

An automatic planner fills the remaining empty cells of a given planning period on the base of constraints and requests. A sample of possible constraints :

- The daily required minimum staffing ,
- Constraints related to the period as imposed minimum number of certain time table codes to be scheduled for a person or a group of persons within a given period. e.g. 5 to 8 evenings (S) per period for the "Nurses" group ,
- Forbidden transitions like the night (N) - morning (M) transition,
- The "floating forks" which impose a number of codes per X days. e.g. : 2 to 5 nights (N) per group of 10 days,
- The balance to be reached per employee at the end of a period. e.g. everyone needs to get a balance between −5:00 and +5:00 except John whose balance should be between 25:00 and 35:00.
- Other possible constraints can be shown during a demonstration.

Detailed reports

An extended number of reports are available, e.g. the printing of the planning in different formats, the printing of all the parameters of the program, statistical overviews (realised timetable codes, leave, sickness, exceptions, …), leave cards, absenteeism analysis, etc.

For those who want to go one step further, a tool for constructing reports is included in the application. This "data warehouse" enables the user to create lists and to make them available to other users of StafPlanner. These lists can also be exchanged with other companies and organisations that use StaffPlanner.

Management of the exceptions

The introduction of exceptions consists in attaching specific information to a cell in the planning, one cell corresponds to a day for an employee. e.g.: the exception RESP, for the person in charge for that day, the exception STAND1 for whom is on stand by for that day, the exception HVDUTY, for the employee that fulfils "heavy duties" during that day.

An unlimited number of exceptions can be introduced and made selectively available on a unit level.

All these exceptions can be brought into account during the salary calculations. They can also be used in statistical reports.

Temporary and flying employees

Flying workers can be deployed here and there as need arises. Specific units could assemble all the flying workers. They have normal timetable codes and they have balances.   The temporary employees do not have balances and come on an irregular base. One can attribute "availabilities" to them. These availabilities are expressed as: "I will be available from July 15 to September 15 during the morning.

The head of departments (units) can introduce in their planning a requests like: "I need a temp for the evening of march 21". StaffPlanner will then match the availabilities of the temporary workers to the requests of the heads of department (units) taking into account the qualifications of the temporary employees.

The Salary Module

This program enables the definition and extraction of salary counters from the realised planning. These salary counters can then be passed on to the software used to calculate the wages. Salary counter rules define the way the planning has to be interpreted and the way in which the timetable codes have to be attributed to the different counters. A few examples of counters and rules are given:

- WORK : number of hours worked, corresponds to the "active" timetable codes as opposed to leave, recuperation days, sick leave,
- NIGHT : number of hours worked between 00:00 and 06:00 and between 20:00 and 24:00.
- NIGHTSU : same as NIGHT but on a Sunday...

This information can be passed on as a text file that can be imported into most of the popular wage processing software.

PayCheck Tool

This tool, which is available within the planning, simulates the computing of the salary starting from a number of selected cells. This feature enables the user to refine and validate the salary counter rules.

Punching data integrated in the planning

Apart from manually correcting the planning, e.g. during the modified period (yellow colour), on can also optain the necessary corrections via the data generated by a time clock. If necessary the raw punching data can be interpreted and smoothed according to predefined rules like the window for clocking in: between 07:55 and 08:00 the clock in time is brought to 08:00. The lunch break and other breaks can also be defined, as well as other rules.

Programmable Time Clock

Clocking in and out becomes interactive when opting for Pyrescom Time Clocks. The employee gets the following information whilst punching :

- the time worked for that day. e.g.: 07:45.
- the time worked since the start of the period. e.g.: 130:00.
- the balance up to the day of punching. e.g.: +02:30.

The employee can also consult the number of outstanding days of leave.

Client/Server architecture

The workstations are equipped with Windows NT or Windows 2000. They are elements of a network with a server on which resides a database. Thanks to the advanced object model structure StaffPlanner boasts near instant response times when working on the planning grid. One can without any worries have more than fifty users working in parallel, each loading and modifying the planning of more than 50 employees over two years. Within the loaded unit one can move at a speed equivalent to that of a spreadsheet.

Open data structure

The following databases are currently supported: Oracle, Sybase, Microsoft SQL server and Informix.
The structures of the tables are documented. This enables your IT experts to exploit the contents of the tables for drawing lists, to extract relevant data or to establish links with other applications