

Oracle® Workforce Scheduling

User Guide for Corporate Profile

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Welcome to Oracle Workforce Scheduling

ABOUT ORACLE WORKFORCE SCHEDULING

Oracle Workforce Scheduling (OWS) is a flexible and powerful workforce management tool that forecasts the labor demand requirements of an organization and optimizes employee schedules to match this demand for labor, in order to meet customer demands and cost objectives.

Controlling labor hours, and thus cost, is one of the biggest problems facing labor-intensive industries. OWS is a simple-to-use product that can reduce overstaffing and understaffing, increase customer service, and decrease payroll costs. The powerful optimization routines built into the product take into account factors such as: demand, employee preferences, skills, availability, labor laws, payroll budgets, workplace rules, best practices, and seasonality.

OWS is a stand-alone application targeted toward solving employee-scheduling problems primarily within the retail sector, although the underlying technology can be applied to other industries as well.

Note: Depending on your access rights, you may not have access to all the modules or pages described in this help. Furthermore, you may have read-only access to certain pages.

See:

[Using the Online Help](#)

[Role of Corporate Profile](#)

ROLE OF CORPORATE PROFILE

The Corporate Profile role in OWS monitors the status of a business enterprise, using Key Performance Indicators (KPIs). A user with this role can view consolidated KPIs at all levels of the organization hierarchy. These KPIs provide relevant and timely information about the sales, workload hours, labor costs, and performance of a store.

You can use the data from these KPIs to identify, analyze, and continuously improve the performance of your store.

Activities

The Corporate Profile role enables you to:

- View the performance of the store for a particular week, in both graph and grid format.
[Performance Summary](#)
- View Key Performance Indicators on a weekly and daily basis.
[Weekly KPI](#)
[Daily KPI](#)

Note: A user logging in with this role has read-only access to all the pages.

See:

[Home Page](#)

HOME PAGE

When you launch OWS, the home page opens. It contains the application bar, the module bar, and the Performance Summary.

Application Bar

The application bar appears on each page. You can use it to select a store or a department, date, and team.

See:

[Application Bar](#)

Module Bar

The module bar appears on each page. You can use the module bar to:

- Navigate to the other modules.
- Open the online help.
- View additional information about OWS.

Note: Depending on your access rights, you may not have access to all the modules or pages described here. Furthermore, you may have read-only access to certain pages.

Performance Summary

The Performance Summary is located on the Corporate Profile Site home page. You can view your store's performance in both grid and graph form.

See:









[Performance Summary](#)

To-Do List

The To-Do List contains notifications that you can close after reading them or checking for any impact they have on your store. You can delete them when they no longer apply. The type of notifications you receive depends on which ones the administrator set up for your role. The notifications might inform you about:

- Data imported
- Information that has changed at the corporate, store, or department level relating to activity or task properties or to employee information, such as changes to contracts, break rules, store closings
- Employees on loan to your store or department and employees lent to another location
- Jobs that have been run

APPLICATION BAR

	Return to the OWS home page.
	Save your data.
	Refresh the data in the current page.
	Select an item in store organization.
	Select a date.
	Select an item in team organization.
	Display error messages (when the icon is red).
	Display statistics about network exchanges between the browser and the server.

See: [Home page](#)

WORKING WITH THE TO-DO LIST

The To-Do List includes notifications that may impact your store or department. The role assigned your login determines the type of notification you receive, and whether the To-Do List appears on the home page or only as a link on the module bar.

The notifications inform you about:

- Steps completed in the weekly process
- Data imported
- People on loan to your store or department or people you have loaned
- Jobs that have been run
- Information that has changed at the corporate, store, or department level

These notifications include information:

- Changes to activity or task properties
- The store, such as week types, events, and store closings
- Employees, such as changes to contracts, break rules, assignments and absences.

Responding to Items on the To-Do List

You can access the To-Do List from the Home page or from a link on the module bar. Clicking the My To-Do List link places the To-Do List in a separate window so you can continue to work on a task while referring to the notification.

The To-Do List contains notifications that you can close after you read them or act on them (for example, by updating a schedule due to an absence). You can delete the items on the list when they no longer apply.

To manage your to-do list, you can:

- Select a single item: Click the selection check box next to the item. To select all the items, click the down arrow next to the Select column title.
- Close an item: Select it and click Close. The closed item remains in the list as an updated status item until you delete it.
- Open a previously closed item to read it: Select it and click Open.
- Delete an item: Select it and click Delete.

Sorting the To-Do List

The To-Do List displays the most current notification at the top of the list. You can re-sort the list based on any column heading. For example, you might sort the list by Origin to view notifications resulting from imports, or sort by Nature to identify which Demand steps have been confirmed in the schedules.

The Date Impact is the date on which the notification takes effect, such as when an absence occurs, a break rules change takes effect, or a schedule begins. You might sort the list by Date Impact to review the items whose effective date approaches.

To sort an item:

Oracle Workforce Scheduling User Guide for Corporate Profile

- Click the appropriate column title. Click the column title again to order the items in a descending order.

USING THE ONLINE HELP

Using the online help does not require any special instructions, but the following pointers can enhance your efficiency when searching for help.

To open the online help, click Help on the Application bar. The help page corresponding to the current page displays.

To access the Contents, Index, and Search functions, click Show.

There are two basic types of help pages: organizing concept pages and procedure pages. The bottom of each organizing concept page contains links to the relevant procedure pages. You can also return to the concept page directly from the procedure page.

See: [Home page](#)

Performance Summary

PERFORMANCE SUMMARY

The Performance Summary provides data for the current week for the entire store. This data appears in both grid and graph form. Using this summary, you can compare your actual weekly sales against the budgeted or forecasted sales.

Budget (\$)	Sales target set at corporate level. This is the same value displayed on the Budget Sales line on the Forecast Summary page when you select a store.
Forecast (\$)	Your sales forecast for the week. This is the same value displayed on the Adjusted Forecast line on the Forecast Summary page when you select a store.
Actual (\$)	Actual sales generated by the store. The Integration Server imports this figure from the external application.

Button

Description



This button updates all the data in the KPI Consolidation module.

KPI Consolidation

KPI CONSOLIDATION OVERVIEW

Weekly KPI

Daily KPI

The KPI Consolidation module contains two tabs that provide real-time information to help you understand the performance of your store:

- [Weekly KPI](#)
- [Daily KPI](#)

Weekly and Daily KPIs include indicators for every aspect of the workforce management activity of a store:

- Sales quality
- Hours quality
- Costs quality
- Schedule quality

All KPIs display specific department information. To view departmental KPIs, select the department on the application bar. Unless you are viewing KPIs immediately after generating a schedule, you should refresh the data by clicking Refresh Corporate on the KPI Consolidation tab. This button refreshes the data on both the Weekly and Daily KPI tabs.

WEEKLY KPI

Weekly KPI **Daily KPI**

The Weekly KPI tab is in the KPI Consolidation module. This tab helps you monitor the key performance indicators for sales, hours, costs, and Sales Per Associated Hours (SPA) on a weekly basis. The Weekly KPI tab contains four pages: Sales, Hours, Costs, and Performance. These pages display values for indicators, such as budget, forecast, demand, and actual to help you track the performance of the store.

Note: Click the following page names to show/hide the descriptions.

Sales

Initial Budget (\$)	Original sales target set at the corporate level. If the value was changed in the course of the year, the new value is shown on the Budget (\$) line below.
Budget (\$)	Sales target set at the corporate level. This is the same value as displayed on the Budget line on the Forecast Summary page, when you select a store.
Forecast (\$)	Your sales forecast. This is the same value as displayed on the Adjusted Forecast line, on the Forecast Summary page when you select a store.
Actual (\$)	Actual sales generated by the store. This value is imported from the store system each night.
Last Year Actual (\$)	Actual sales generated by the store for the same week last year.
Variance to Budget (\$)	Actual sales minus budgeted sales.
Target Sales Ratio	Actual dollar sales divided by budgeted dollar sales.
Variation to Last Year (%)	Difference between this year and last for the same week.

Hours

Initial Budget (Hrs)	Original workload target set at the corporate level, in hours. If this value was changed in the course of the year, the new value is shown on the Budget (Hrs) line below.
Budget (Hrs)	Workload target set at the corporate level, in hours. This is the same value as displayed on the Budget line on the Demand Summary page when you select a store.
Demand (Hrs)	Your workload requirement, in hours. This is the same value as displayed on the Demand Hours line on the Demand Summary page when you select a store.
Scheduled (Hrs)	Number of hours scheduled in the optimized weekly schedule.
Earned (Hrs)	Daily hour requirements calculated based on actual driver values.

Actual (Hrs)	Number of hours actually worked by your employees. This value is imported from the store system each night.
Adjusted Variance to Budget (Hrs)	Hours Workload budget multiplied by Target Sales Ratio - Actual Hours Scheduled.
Last Year Actual (Hrs)	Number of hours actually worked by your employees on the same date last year.
Variation to Last Year (%)	Difference between this year and last for the same week.
Additional Budget (Hrs)	Hours allowed in addition to budget.
Additional Scheduled (Hrs)	Additional hours that you scheduled.

Costs

Initial Budget (\$)	Original cost target set at the corporate level. If this value was changed in the course of the year, the new value is shown on the Budget (\$) line below.
Budget (\$)	Labor cost target set at the corporate level.
Scheduled (\$)	Labor cost for the store, according to the optimized weekly schedule.
Actual (\$)	Actual labor cost. This value is imported from the store system each night.
Last Year Actual (\$)	Actual costs generated by the store for the same week last year.
Adjusted Variance to Budget (\$)	Labor Cost budget multiplied by Target Sales Ratio - Actual labor cost
Variation to Last Year (%)	Difference between this year and last for the same week.

Performance

Budget SPAH (\$/Hours)	Budgeted sales per associated hours. This is budgeted sales in dollars divided by budgeted hours of work (rounded).
Forecast SPAH (\$/Hours)	Forecasted sales per associated hours. This is forecasted sales in dollars divided by forecasted hours of work (rounded).
Actual SPAH (\$/Hours)	Actual sales per associated hours. This is actual sales in dollars divided by actual hours of work (rounded).
Budget Costs/Sales (%)	Budgeted payroll cost divided by store sales in dollars.

Actual Costs/Sales (%)	Actual payroll cost divided by store sales in dollars.
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You must click Refresh Corporate in the Corporate Profile home page to refresh this data.

DAILY KPI

[Weekly KPI](#)
[Daily KPI](#)

The Daily KPI tab is in the KPI Consolidation module. This tab helps you monitor the key performance indicators of sales, hours, cost, and Sales Per Associated Hours (SPA) for a store on a daily basis. The Daily KPI tab contains four pages: Sales, Hours, Costs, and Performance. These pages display daily values for indicators, such as budget, forecast, demand, and actual to help you track the performance of the store.

Note: Click the following page names to show/hide the descriptions.

Sales

Initial Budget (\$)	Original sales target set at the corporate level. If this value was changed in the course of the year, the new value is shown on the Budget (\$) line.
Budget (\$)	Sales target set at the corporate level. This is the same value as displayed on the Budget line on the Forecast Summary page when you select a store.
Forecast (\$)	Your sales forecast. This is the same value as displayed on the Manager line on the Forecast Summary page when you select a store.
Actual (\$)	Actual sales generated by the store. This value is imported from the store system each night.
Last Year Actual (\$)	Actual sales generated by the store on the same date last year.
Variance to Budget (\$)	Actual sales minus budgeted sales.
Target Sales Ratio	Actual dollar sales divided by budgeted dollar sales.
Variation to Last Year (%)	Difference between this year and last on the same date.

Hours

Initial Budget (Hrs)	Original workload target set at the corporate level, in hours. If this value was changed in the course of the year, the new value is shown on the Budget (Hrs) line below.
Budget (Hrs)	Workload target set at the corporate level, in hours. This is the same value as displayed on the Budget line on the Demand Summary page when you select a store.
Demand (Hrs)	Your workload requirement, in hours. This is the same value as displayed on the Manager line on the Demand Summary page when you select a store.
Scheduled (Hrs)	Number of hours scheduled in the optimized weekly schedule for

	that day.
Earned (Hrs)	Daily hour requirements calculated based on actual driver values.
Actual (Hrs)	Number of hours actually worked by your employees. This value is imported from the store system each night.
Adjusted Variance to Budget (Hrs)	Hours Workload budget multiplied by Target Sales Ratio minus Actual Hours Scheduled
Last Year Actual (Hrs)	Number of hours actually worked by your employees on the same date last year.
Variation to Last Year (%)	Difference between this year and last on the same date.

Costs

Initial Budget (\$)	Original cost target set at the corporate level. If this value was changed in the course of the year, the new value is shown on the Budget (\$) line below.
Budget (\$)	Labor cost target set at the corporate level.
Scheduled (\$)	Labor cost for store per day, according to the optimized weekly schedule.
Actual (\$)	Actual labor cost. This value is imported from the store system each night.
Last Year Actual (\$)	Actual costs generated by the store on the same date last year.
Adjusted Variance to Budget (\$)	Labor Cost budget multiplied by Target Sales Ratio - Actual labor cost
Variation to Last Year (%)	Difference between this year and last on the same date.

Performance

Budget SPAH (\$/Hours)	Budgeted sales per associated hours. This is budgeted sales in dollars divided by budgeted hours of work (rounded).
Forecast SPAH (\$/Hours)	Forecasted sales per associated hours. This is forecasted sales in dollars divided by forecasted hours of work (rounded).
Actual SPAH (\$/Hours)	Actual sales per associated hours. This is actual sales in dollars divided by actual hours of work (rounded).
Budget Costs/Sales (%)	Budgeted payroll cost divided by store sales in dollars.
Actual Costs/Sales (%)	Actual payroll cost divided by store sales in dollars.

You must click Refresh Corporate in the Corporate Profile home page to refresh this data.

Glossary

A

Activity: In the schedule, you can assign employees to activities for which they are qualified. You can assign an employee to several activities in the same day.

Actual drivers: Actual drivers are the real values of drivers recorded by the store system and imported into OWS the following day or at the end of the week. For example: You may forecast a day's sales to be \$1000; however, the actual sales may have been \$1300. The forecast value is 1000, and the actual value is 1300. OWS uses actual values in the earned hours calculation.

Alert: Warns you if your data is inconsistent or if your workforce cannot meet your work requirements. Some alerts are for information purposes only, while others require you to address the problem before proceeding further. Alerts contain information to help you locate the problem.

B

Budget: The global store target, established at the corporate level. In the Forecast step, the budget is in dollars. In the Demand step, the budget is in hours.

C

Cap: The total amount of time that all employees are assigned to a given special fixed activity can be capped. You can set a cap for a day, for a week, or both.

Check step: The third step in the Weekly Process. Enables you to run a preliminary check to identify potential scheduling problems, to solve the problems, and to submit your schedule optimization request.

Core activity: A core activity is a responsibility that may be called upon, such as first-aid assistant or key holder. It is not a real activity in that it does not appear in the weekly schedule. Employees are never assigned to just a core activity. They are always assigned to an activity (see Activity).

Core coverage: The coverage required to ensure the minimum level of core activities.

Cycle: Period during which one or more week types recur in a repetitive pattern. Cycles can have specific start and end dates, or be open-ended (infinity).

D

Demand: The number of hours of work required for each activity. OWS calculates the demand by applying labor standards to the forecasts.

Demand step: The second step in the Weekly Process. It shows the hours required to perform each daily activity for the week. OWS calculates these hours based on the driver forecasts.

Departments: Logical divisions of your store organization. Business departments reflect how your store is organized. Team departments reflect how the employees are grouped. Both types are optional and are defined within OWS Designer tool. You can have any number of sub-departments.

Derived drivers: A driver that is calculated based on another driver.

Driver: You can make daily forecasts in a wide range of areas (such as sales, store traffic, number of transactions, number of crates received). Each of these areas is a driver. Depending on the driver, the forecast can be in dollars, number of people, number of boxes, and so on. There are two basic types of drivers: forecasted drivers and non-forecasted drivers.

E

Earned hours: Earned hours are hour requirements that OWS calculates based on actual driver values.

Employee hours: There are three types of employee hours: availabilities, preferences, and fixed hours. Availabilities: The total hours the employee is available to work on a day . Preferences: The employee's preferred hours of work. Fixed hours: The hours the employee must work within a specific time range.

F

Fixed hours: 1. Activities which must be performed within a given time period and require either a specific number of hours or a specific number of persons. 2. An employee scheduling requirement.

Forecast step: The first step in the Weekly Process. It allows you to view, customize, and commit daily forecasts for the week selected. Forecasts are based on drivers.

Forecasted drivers: Drivers that are forecasted by the system. Forecasted drivers are either calculated by OWS or generated by external applications and imported into OWS. You can customize the forecasts of forecasted drivers based on your store-specific knowledge.

I

Initialize: Initialization of a profile consists of indicating the timeframe when it is valid and available for scheduling.

K

Key performance indicators (KPIs): A set of performance indicators that helps you track your business performance and the quality of your schedules.

L

Labor standard: To calculate the daily hour requirements for each activity based on the forecasts, OWS applies a specific labor standard, translating the forecast into a number of hours in one or more activities. For example: The labor standard for boxes may state that 100 boxes received generates 1 hour of unloading and 2 hours of stocking.

N

Non-forecasted drivers: Drivers that are not forecasted by the system because they are too unpredictable or store-specific. They are either forecasted by the administrator or left

empty. You can customize the forecasts of non-forecasted drivers based on your store-specific knowledge.

O

Optimized schedule: OWS matches the hourly requirements from the Demand step against employee availabilities, constraints, and skills and seeks the best match between the two. The result is an optimized schedule (a schedule that makes optimum use of your workforce).

OWS: Oracle Workforce Scheduling (OWS) is a workforce management tool that allows store managers to generate optimized weekly schedules for their personnel. The core of OWS is the Weekly Process.

P

Post step: The last step in the Weekly Process. During this step, you display and print the schedule and complete the Weekly Process.

Pre-forecasted drivers: Drivers you forecast through external systems and then import into OWS. Combined with forecasted drivers, they make up the system forecast.

Pre-scheduling check: The check you run before actually generating the schedule. OWS identifies potential scheduling problems due to inconsistencies in employee data, and you can correct them at this stage.

Profile: OWS uses profiles to forecast cyclic occurrences. They are mainly used to forecast drivers.

R

Rotation: A set of week types arranged in a specific pattern and occurring repetitively throughout a cycle.

S

Schedule step: The fourth step in the Weekly Process. During this step, you assess the optimized weekly schedule, remove scheduling problems, and make any necessary changes to the schedule.

Scheduled activity: An activity assigned manually by the store manager to an employee.

Special fixed activities: Activities that require a specific person at a specific time.

Store event: A special event occurring over a specific period that impacts certain driver forecasts.

Store parameters: Physical parameters that are specific to a store. Store parameters are generally constant: They are not greatly affected by factors such as business levels or week types. Floor square footage is a store parameter.

Store property driver: A driver you define using a store property (such as square footage).

System forecasts: Forecasts that are either calculated directly by OWS or generated by external applications and imported into OWS.

W

Week type: To characterize the weeks of a year, you assign each week a week type. A similar calendar week often has the same week type. However, for a same calendar week, different drivers, activities, and profiles may use different week types. OWS also uses week types to determine employee hours.

Weekly Process: The core of OWS, used to generate the weekly schedule. The Weekly Process consists of five steps: Forecast, Demand, Check, Schedule, and Post.

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