

Oracle® Workforce Scheduling

User Guide for Operations Administrators

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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 over staffing and under staffing, 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 Administrator](#)

ROLE OF OPERATIONS ADMINISTRATOR

Oracle Workforce Scheduling includes three administration roles:

- Operations Administrator (Admin)
The operations administrator is responsible for organization management, including managing hierarchies and logins, and managing asynchronous jobs.
- Functional Administrator (OWS Admin)
The functional administrator manages global functions related to the store, including defining global values for contracts and events, opening new stores, and scheduling and managing asynchronous jobs.
- Corporate Applications Administrator
The corporate applications administrator performs the tasks of the functional administrator (OWS Admin) and the store manager. Store managers view and work on the stores and departments associated to their login, maintain employee information, monitor key performance indicators, view and modify parameters used to generate forecasts and hour requirements.

Activities

Operations administrators in OWS define the organizational structure of the enterprise and create logins for the various user roles. They have the following responsibilities:

- Create logins for store, district, and corporate manager
[User Roles and Logins](#)
- Add, change, or delete nodes from the hierarchies to maintain organizational hierarchy and data
[Hierarchy Management](#)
- Job Management
[Job Management](#)

See:

[Home Page](#)

HOME PAGE

When you launch the operations administration site (ADMIN), the home page opens. It contains the application bar and the module bar.

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:





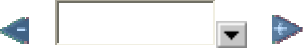



- Navigate to the other modules
- Open the online help
- View additional information about OWS

To-Do List

The To-Do List contains notifications that you can close after reading or responding to them. 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 processes that you have completed, such as the a confirmation about a new node created or contain information about information at a corporate level, such as a change store openings.

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.

APPLICATION BAR

	Return to the home page.
	Save your data.
	Refresh the data in 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:

- 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 making searches.

To open the online help, click Help in 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.

[Home page](#)

Logins

USER ROLES AND LOGIN

[Search Login](#)

[Create Login](#)

[Create Login Group](#)

OWS includes role-based security. A role is based on a profile which is linked to a set of modules and pages, such as the Weekly Process and Employee Maintenance. The administrator defines the roles at setup.

You associate roles to logins in the OWS application. The role you associate to a login determines the user's:

- View and access privileges.
- Level of the business organization the user can access.
- Viewable teams.

OWS includes the following predefined roles that you can associate to logins:

- **Corporate** (Corporate Profile) can view consolidated KPIs at all levels of the organization. Access is read-only.
- **Operations Administrators** (Admin) can create logins and maintain organizational hierarchies and data, and manage jobs.
- **Functional Administrators** (OWS Admin) can manage global functions related to the store, including defining global values for contracts and events, opening new stores, managing assignments, and scheduling and managing jobs.
- **Corporate Application Administrators** can perform the combined functions of the functional administrators and store managers
- **Store Managers** can view and work on the stores and departments associated to their login, maintain employee information, monitor key performance indicators, view and modify parameters used to generate forecasts and hour requirements, and manage jobs.
- **Department Managers** can perform the same tasks as the store manager but on the department level associated to their login.
- **District Managers** have read-only access to the stores within their district associated to their login and can view the same modules as the store manager.

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

See:

[Search for a Login](#)

[Create a Login](#)

[Create a Login Group](#)

How To

Create a Login Group

You associate the roles to logins that you create. All logins belong to a login group. The application includes a parent login group, but you can define other login groups below this level. These groups can then serve in turn as parent login groups.

For example: If your company has several districts, you might create a login group for each individual district and then define store logins based on the parent district login.

To create a login group:

1. On the module bar, click Logins.
2. Click the Create Login Group tab.
3. Select a Parent Login Group from the list.
4. Enter a name for the Login Group that belongs to this parent group.
5. Click Create to save the login.
The login group now appears in the Parent Login Group list. You can now use this new login group as a parent login group, when defining other logins.

See:

[Create a Login](#)

[Search for a Login](#)

[Modify a Login](#)

[Delete a Login](#)



Create a Login

You associate the roles to logins that you create. All logins belong to a login group. The application includes a parent login group, but you can define other login groups below this level. These groups can then serve in turn as parent login groups.

For example: If your company has several districts, you might create a login group for each district and then define store logins based on the parent district login.

You can create login groups, create logins, and search for and modify existing logins.

To create a login:

1. On the module bar, click Logins.
2. Click the Create Login tab.
3. Select a Login Group.
Note: If no login group displays, then you must [create a login group](#).
4. Select a Role.
5. To set the level at which the login takes effect at the:
 - Business organization level: Click  on the application bar to display the business hierarchy and select a node in the tree.
 - Team level: Click  on the application bar to display the team hierarchy and select a node in the tree.
6. Enter the Login.
7. Enter the Password.
8. Repeat the password in the Confirm Password field.
9. Select a Language.
10. Select a Time zone.
11. Enter a Start and End Date for the new Login.
You can choose + ∞ (infinity) for the end date.
12. Click Create.
A message notifies you of the results.

See:

[Search for a Login](#)



[Modify a Login](#)

[Delete a Login](#)

Search for a Login

You can create login groups, create logins, and search for and modify existing logins.

To search for a login:

1. On the module bar, click Logins.
2. Click the Search Login Tab.
3. Enter the search criteria. You must specify at least one of the following criterion:
 - Select the Login Group.
 - Select a Role.
 - To start the search at a location in the business hierarchy, click  on the application bar to display the business hierarchy and select a node in the tree.
 - To start the search at a location in the team hierarchy, click  on the application bar to display the team hierarchy and select a node in the tree.
 - Enter a login.
4. Click Search to display a table of matching logins.
5. Click Details to view the complete login information.
6. Click Cancel to return to the Logins home page.

See:

[Create a Login](#)

[Modify a Login](#)

[Delete a Login](#)

Modify a Login

You can create login groups, create logins, and search for and modify existing logins.

To modify a login:

1. Search for the login you want to modify.
See [Search for a Login](#).
The application displays the search results in a table.
2. Click Details to view the complete login information.
3. Edit the entries.
4. Click Modify.
A message indicates the results.
5. Click Cancel to return to the Search Login page.

See:

[Create a Login](#)


[Search for a Login](#)

[Delete a Login](#)

Delete a Login

The Search Logins tab enables you to search for and modify existing logins. You can also delete logins in this tab.

To delete a login:

1. Search for the login you want to delete.
See [Search for a Login](#).
The application displays the search results in a table.
2. Locate the login you wish to delete, and click  for that row.

See:

[Create a Login](#)

[Search for a Login](#)

[Modify a Login](#)

Organization Management

ORGANIZATION MANAGEMENT

Node Creation

Business Node Modification

Team Node Modification

Oracle Workforce Scheduling represents an organization's business and management relationships through a business and team hierarchy. The team hierarchy illustrates the relationship between employees and management. The business hierarchy describes the organizational levels of the business.

The administrator sets up the business organization in OWS by importing the organizational hierarchy information. The hierarchy is defined during configuration by the administrator using OWS Designer. The import process creates the:

- Business and team hierarchies
- Stores, including the business information (activities, tasks, drivers) and team information (contracts, teams) related to the store

As operations administrator, you can use Oracle Workforce Scheduling to manage the organization by modifying the existing business and team hierarchies and creating logins for your users.

See:

[Create a Node](#)

[Change a Business Node](#)

[Change a Team Node](#)

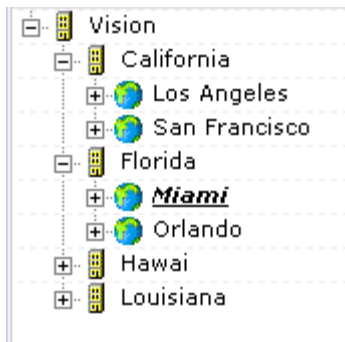
HIERARCHY MANAGEMENT

Oracle Workforce Scheduling represents an organization's business and management relationships through a business and team hierarchy. The team hierarchy illustrates the relationship between employees and management. The business hierarchy describes the organizational levels of the business.

The business and team hierarchies share a common root node (typically, the company name). But each hierarchy can include a different number of intervening levels, such as company, region, province, district, store, or department.

For example: The business hierarchy might include corporate and regional offices, and stores. The team hierarchy might contain the same structure, but also include an additional organizational level between the corporate and regional offices for the state and its regulations governing work weeks.

Each level of the hierarchy tree can have several nodes. (An entity on the business or team hierarchy tree is referred to as a node.) In the image below, Florida, Miami, and Orlando are examples of nodes. Florida, is an example of a 'district' level node, and Miami is an example of a 'store' level node.



The import process creates the hierarchies. Using OWS, you can then manage the hierarchies by adding, changing, or deleting nodes from the hierarchies. For example, you may want to add or remove a store.

See:

[Create a Node](#)

[Change a Business Node](#)



[Change a Team Node](#)

How To

Create a Node

You can add an organization to a business or team hierarchy by creating a node in the tree structure.


To create a node:

1. On the module bar, click Organizations.
2. On the application bar, select the organizational level directly above the node you want to create:
 - Click  to add a business node.
 - Click  to add a team node.
3. In the Organization Node Creation dialog box, enter the Name of the node.
4. Enter a Code which data import programs can use as an identifier.
5. Select the Node Type, Business Store Type, and Team Store Type from the lists.

If your configuration for Node Type includes departments, you can choose mandatory or optional departments. When an administrator creates a store:

- A mandatory department, such as a cashier department, is automatically added to the store
- The administrator can add an optional department, such as an electronics department, to the store and not add it to another store

The Business Store Type and the Team Store Type available for entry and the values listed for them depend on the setup information defined for the nodes in the Customer Configuration Dictionary, during the configuration phase.

6. Enter the Validity Dates for the node.
You can choose – ∞ (infinity) for the start date and + ∞ (infinity) for the end date.
7. On the application bar, click  to save your changes.

A confirmation notification about the node creation appears in your to-do list.

See:



[Change a Business Node](#)

[Change a Team Node](#)






Change a Business Node

You can change the values of a business node and its position in the tree structure.

To change the values of a business node:

1. On the module bar, click Organizations.
2. Click the Business Node Modification tab.
3. On the application bar, click  to select the business node you want to edit. The data for that business node appears in the Organization Node Modification dialog box.
4. Change the name of the node. You cannot modify the Code or Node Type.
5. On the application bar, click  to save your changes.

To change the position of a business node in an organization tree:

1. On the module bar, click Organizations.
2. Click the Business Node Modification tab.
3. On the application bar, click  to select the business node you want to reposition.
4. Click  in the History Table.
5. In the Create a Range box, enter the Start Date the repositioning takes effect and the End Date when it concludes. You can choose – ∞ (infinity) for the start date and + ∞ (infinity) for the end date.
6. Click OK to close the dialog box. A new empty line appears for the assignment.
7. In the History table, click  to select a new link for the current business node.
8. Select a node that is one level higher in the tree structure than the current one.
Note: To delete a link, click  on the line of the link in the Organization Node Modification table.
9. On the application bar, click  to save your changes.

See:



[Hierarchy Management](#)

[Change a Team Node](#)






Change a Team Node

You can change the values of a team node and its position in the organization tree.

To change the values of a team node:

1. On the module bar, click Organizations.
2. Click the Team Node Modification tab.
3. On the application bar, click  to select the team node.
The data for that team node appears in the Organization Node Modification dialog box.
4. Change the node Name as needed.
You cannot modify the Code or the Node Type.
5. On the application bar, click  to save your changes.

To change the position of a team node in an organization tree:

1. On the module bar, click Organizations.
2. Click the Team Node Modification tab.
3. On the application bar, click  to select the team node you want to reposition.
4. Click  in the History Table.
5. In the Create a Range box, enter the Start Date the repositioning takes effect and the End Date it concludes.
You can choose – ∞ (infinity) for the start date and + ∞ (infinity) for the end date.
6. Click OK to close the dialog box.
A new empty line appears for the new assignment.
7. In the History table, click  to select a new link for the team node.
8. Select a node that is one level higher in the tree structure than the current one.
Note: To delete a link, click  on the line of the link in the Organization Node Modification table.
9. On the application bar, click  to save your changes.

See:

[Hierarchy Management](#)

[Create a Node](#)


[Change a Business Node](#)

Job Management

JOB MANAGEMENT OVERVIEW

The Job Management module provides complete job status information. You can search for a job that has been launched, view job details, change the scheduled date or priority of a pending job, and cancel a job that is pending or running.

To search for a job:

1. Open the Job Management module.
2. Click  and select a level of the business organization, such as a store or department.
3. In the Search Jobs window, from the list of common job statuses, select the status of the jobs you want to view.

To set more specific criteria, choose [Advanced Search](#).

4. In the Jobs List, locate the job.
To sort the list, click the column heading that corresponds to the criteria you want to use. Click the heading again to change the sort order from ascending to descending.
5. To view more information about the job, click the Details link to display the Job Information dialog.

For waiting jobs, you can update the scheduled date and priority.

6. To display more information, click Show Report.
7. From the Job Reports window, you can display further information, such as:
 - Job log
 - Trace record
 - Input parameters of the optimization process

See:

[Canceling a Job](#)


[Rescheduling a Pending Job](#)

How Tos

Using Advanced Search to Find a Job

The Job Management module provides job status information. You can search for a job that has been launched and view details about it. The initial search window lists the most common searches performed for a job, such as Last Executed Jobs. If you require additional search criteria to reduce or widen the scope of the search, you can use the Advanced Search feature.

To conduct an advanced search:

1. Open the Job Management module.
2. Click  and select a level of the business organization, such as a district, store, or department.
3. In the Search Jobs window, select Advanced Search.

The application displays additional windows for entering search criteria. (You do not have to complete all the fields.) If you enter more than one set of search criteria, the application can sort the results based on the priority that you assign:

- Order: Enter the importance of the search criteria, using 1 as the highest priority. For example, you might enter 1 for the sort order priority for the Select Procedure Information, and 2 for the Scheduled Time
 - Desc: Sort the results in descending order
4. In the Select Procedure window, you can select the type of job. Several field labels correspond to the job name, such as Check Schedule. The others include:
 - Optim: Optimization
 - Outinterface: Export job
 - InInterface: Import job
 - Job Schedule: Job produced when you initiate a job using the Job Scheduler module
 5. In the Select Schedule Dates window, you can select the dates on which you plan to run the job. Enter a date:
 - From: The job is scheduled to run after this date
 - To: The job is scheduled to run before this date

You can leave either field blank. Entering a From date searches all jobs after that date; entering a To date searches all jobs which run before the job scheduled completion date.

For example, if you scheduled a job to run next week to export KPIs for the current week, the:

- 'From' is the day next week when the job is scheduled to run, for example, on Monday
- 'To' is the day next week when the job is scheduled to end, for example, on the same day (Monday) or following day (Tuesday)

6. In the Select Start Date window, select a date range for the system date when the job started. Use this window for jobs that have finished running. Enter a date:
 - From: The earliest date for the Start Date
 - To: The latest date for the Start Date

For example: If you are looking for an Import job that started early last week, you could enter the first day of the week as the From' date and the third day of the week as the To date.

7. In the Select End Date window, select a date range for the system date when the job has concluded. Use this window for jobs that have finished running. Enter a date:
 - From: The earliest date for the End Date
 - To: The latest date for the End Date

For example: If you are looking for an Import job that finished at the end of the month, you could enter the last day of the month in the To field and a few days before the last of the month in the From field.

8. In the Select Dates window, you can select the precise date or the interval that applies to the job context. The context is the day or the range of days the application uses as a basis for the calculation, optimization, or export process. The application enters default dates of the start and end of the week. You can enter a different date:
 - From: The context date occurs after this date
 - To: The context date occurs before this date.

For example: If you run a job today Wednesday June 4 to calculate a forecast for the following week, you could enter a From date of Monday, June 9 and a To date Monday, June 16. The application would search for jobs which have a context range of June 9 to June 16.

You can leave either field blank. Entering a From date searches all jobs after that date; entering a To date searches all jobs before that date.

9. In the Select Queue window, you can enter the number of the job queue you set up.

The queue number is determined at configuration; every application that posts a job has a predefined queue number.
10. In the Select Status window, select a status that corresponds to the job phase or job state, such as Running or Suspended.
11. Click Search to display the results of your search in the Job List window.

See:

[Job Management](#)


[Canceling a Job](#)

[Rescheduling a Pending Job](#)

Canceling a Job

The Job Management module provides complete job status information. You can search for a job that has been launched and cancel it. You can also cancel a job with a Waiting or Running status to remove it from the Job List.

To cancel a job:

1. Open the Job Management module.
2. Click  and select a level of the business organization, such as a store or department.
3. In the Search Jobs window, select a job status, such as Waiting. Click Search.

To set more specific criteria, choose [Advanced Search](#).

4. In the Jobs List, locate the job.

To sort the list, click the column heading that corresponds to the criteria to use. Click the heading again to change the sort order from ascending to descending.

5. Click the Select checkbox to select the job.

To select all the jobs in the list, click the down arrow next to Select in the column title.

6. Click Cancel.

You can view a listing for the cancelled job by searching for Last Executed Jobs. The application lists the job with a status of StoppedbyAdmin.

See:

[Job Management](#)

[Using Advanced Search to Find a Job](#)


[Rescheduling a Pending Job](#)

Rescheduling a Pending Job

The Job Management module provides complete job status information. You can search for a job with a Waiting status and:

- Reschedule the job by changing the date on which it runs
If you need to change other details about the job, cancel the job, or have the administrator reschedule it using the Job Scheduler.
- Change the priority assigned the job

To reschedule a pending job:

1. Open the Job Management module.
2. Click  and select a level of the business organization, such as a store or department.
3. In the Search Jobs window, select Waiting Jobs. Click Search.
4. In the Jobs List, locate the pending job.
To sort the list, click the column heading that corresponds to the criteria you want to us. Click the heading again to change the sort order from ascending to descending.
5. Click the Details link to display the Job Information dialog.
 - The Context Date refers to the date the application uses as a basis for the calculation, such as a Pre-Scheduling Check.
 - The Schedule Date is when you plan to run the job.
 - The Start and End Dates are when the job runs and ends.
6. To change the Schedule Date, place your cursor in date field and enter a new date.
7. To change the Priority, enter a different number.

See:

[Using Advanced Search to Find a Job](#)

[Canceling a Job](#)

[Job Management](#)

Glossary

A

Activity: In the schedule, employees are assigned to activities for which they are qualified. An employee may be assigned 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: Global store target, established at 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. Caps can be daily, weekly, or both.

Check step: The third step in the weekly process. Allows 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. The demand is calculated 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. These hours are calculated based on the driver forecasts.

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

Driver: Daily forecasts can be made in a wide range of areas (e.g. sales, store traffic, number of transactions, number of crates received, etc.). Each of these areas is called a driver. Depending on the driver, the forecast can be in dollars, number of people, number of

boxes, etc. There are two basic types of drivers: forecasted drivers and non-forecasted drivers.

E

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

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

F

Fixed hours: 1. Activities that must be performed within a given time period, and that 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 outside systems and imported into OWS. You can customize the forecasts of forecasted drivers based on your store-specific knowledge.

K

Key performance indicators (KPIs): A set of performance indicators that allow you to monitor your business and the quality of your schedules.

L

Labor standard: To obtain the daily hour requirements for each activity based on the forecasts, a specific labor standard is applied, 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.

Login: Each user must have a separate login and password. The role associated to the login determines the user's view and access privileges.

Login group: All logins belong to a login group. OWS includes a parent login group, but you can define other login groups below this level. These groups can then serve in turn as parent login groups.

N

Node: An entity on the business or team hierarchy tree is referred to as a node.

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

P

Post step: The last step in the weekly process. It allows you to display and print the schedule, and to close the weekly process.

Pre-forecasted drivers: Drivers that are forecasted by external systems and then imported into OWS. Combined with forecasted drivers, they make up the system forecast.

Pre-scheduling check: The check that you run before actually generating the schedule. Potential scheduling problems due to inconsistencies in employee data are identified and can be corrected at this stage.

Profile: Profiles are used 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. It allows you to assess the optimized weekly schedule, remove scheduling problems, and make any necessary changes to the schedule.

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

Store event: A special event such as clearance sales, special promotions, or holidays occurring over a specific period and has an impact on certain driver forecasts.

Store parameters: Physical parameters those 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 outside systems 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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