Oracle® Workforce Scheduling

User Guide for Functional Administrators

Release 5.0.2 for Windows

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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 screens described in this help. Furthermore, you may have read-only access to certain screens.

See:
Using the Online Help
Role of Functional Administrator

ROLE OF FUNCTIONAL ADMINISTRATOR

The two administrator roles within Oracle Workforce Scheduling are operations administrator and the functional administrator.

The operations administrator is responsible for organization management, including managing hierarchies and logins. The functional administrator manages global functions related to the store, including defining global values for contracts and events, opening new stores, exporting schedules, and running weekly processes. The operations and functional administrators perform their tasks in two separate OWS Administration sites.

Functional administrators in OWS are responsible for store management and must configure the settings of the application to suit the business process of their enterprise.

Activities

Functional administrators have the following responsibilities:

- Create a new store based on an existing store.
  See: Store Management

- Modify a contract.
  See: Contract Management

- Enter global values at the corporate level for forecasts and hour requirements at setup and update them when necessary.
  See: Utilities Overview

- Define a complete list of global events at a particular node in the organizational hierarchy.
  See: Events Overview

- Assign employees to other stores.
  See: Manage Employee Assignments

- Export workforce schedules and KPIs.
  See: Export a Workforce Schedule

- Launch weekly processes for all the stores at a selected level of the hierarchy.
  See: Process Overview

See:
Home Page

HOME PAGE

When you launch the Administration site of OWS, 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.

APPLICATION BAR

	Return to the home page.
	Save your data.
	Refresh the data in current screen.
	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.

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 on the application bar. The help page corresponding to the current screen 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 directly to the concept page from the procedure page.

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:
Home Page

Manage Stores
STORE MANAGEMENT

There are three phases to set up a store.

The first phase is the analysis and configuration phase. The business consultant and project management establish the business models for the stores. This phase concludes with the generation of the Customer Configuration Dictionary, a dictionary of objects and related parameters.

The second phase is the data definition phase. The business consultant and functional administrator define default values for the models and import the results to the OWS application.

The third phase is the application startup and maintenance phase. The functional administrator manages and maintains information about the stores using the OWS application.

The following table describes the process of setting up a store.

Phase	Roles	Application	Objective	Results
Analysis/ Configuration	Customer project management Business consultants	OWS Designer	Define models for the Customer Configuration Dictionary.	• Store organization templates. • Team organization templates. • Description of employee profiles, contracts, activities and related tasks.
Data Definition	Business consultants Functional administrator	OWS Application	• Create hierarchies and stores. • Import business and employee data.	• Business organization. • Team organization. • Default store data defined.
Application startup and maintenance	Operations administrator Functional administrator	OWS Application	• Create user logins. • Create a new store. • Maintain organization hierarchies	• Logins for store, district, corporate managers. • Store created based on existing store.

				and data.	• Updates to organization hierarchies, contracts, and global events.

See:
Open a New Store

OPEN A NEW STORE

Using the OWS application, you can create a set of data for a new store that you have added to the business hierarchy. You can do this by copying data items from an existing store such as, time profiles for the work week to the new store.

To open a new store:

1. On the administrator's home page, click ⬛▾ and select the store from the business hierarchy.

2. Click Open a New Store.

3. Click ⬛▾ to display the list of existing stores.

4. Select a store that has the same type of data as the new store you want to create. The application uses the data from the selected store to create the new store.

5. Click Next. The window displays all the data from the selected store in the Sample Store box.

6. Enter the Start Date and End Date for the new store. To copy all the source store's data, select – infinity (∞) for the start date and +infinity (∞) for the end date.

7. Select the data items you want to use for the new store.

    • To add items to the new store, select the item and click Add. (To add several items at once, select the first item in the list, hold down the shift key, and select the last item in the sequence, and then click Add.)

    • To remove items from the new store, select the item and click Remove.

8. When you have finished selecting the data items you want for the new store, click Next. The Summary page displays the list of items exported to the new store.

9. Review the data in the Summary table. **Note**: To make corrections, click Back until you reach the window that contains the wrong information. After correcting it, continue to the next step.

10. To exit the procedure without saving your current work, click Cancel. You return to the home page.

11. When you are satisfied with the information contained in the Summary table, click Finish to save the new store data.

Manage Contracts

CONTRACT MANAGEMENT

Scheduling Rules	Break Rules

During setup, you create standard types of contracts, such as open-ended, fixed term, and part-time contracts. You link each contract type to a level of the business organization and specify default values for the contract. You can link several types of contracts to the same node level.

Inheritance always occurs from the top down, with one exception: A standard contract linked to a lower level node replaces the properties of the same type of contract linked at a higher level. (The replacement occurs only if you specify values for the contract at the lower level.) For example, if you designed an open-ended contract for a specific region, the regional contract replaces the open-ended corporate contract.

After you import the contract to OWS, you can modify its default values, including the scheduling rules and employee's break details for a work shift.

See:

Modify a Contract

MODIFY A CONTRACT

Using the Contract Values tab, you can modify the default values of a contract, including the scheduling rules and employee's break details for a work shift.

To modify a contract:

1. On the module bar, click Contracts Values.

2. On the application bar, click [icon] to display the team hierarchy that has the links to the contracts you want to modify.
   At each level of the tree, you can click ⊞ to display the sublevels.

3. Select the level that contains the contract.

4. On the Scheduling Rules tab or the Break Rules tab, click [icon] to display the list of contracts for that level.

5. Select the contract type you want to modify.
   The Scheduling Rules and Break Rules tabs display the contract properties.

6. On the Scheduling Rules and Break Rules tabs, enter missing information in the cells or edit existing information.
   To edit a time in hours and minutes (separated by a colon ":"), position the cursor in the hours field and click the arrows to the right of the field. Repeat this step to change the number of minutes.
   Red triangles indicate that the value is inherited from the same type of contract that is linked to a node at a higher level of the team hierarchy. When you change the value, the color of the triangle changes to indicate that the local value applies.
   Note: Complete all the cells in the table. The application does not enter a default value for the empty cells when you assign the contract to an employee.

7. When you complete the modifications, click [icon] on the application bar to save the new values.
   The application modifies the contract based on the values you entered.

See:

Contract Management

Work with Utilities
UTILITIES OVERVIEW

Drivers History	Week Type	Distribution	Time Window	Properties	Actual Drivers	Store Closing

The Utilities module contains the seven tabs displayed here. OWS uses the data in these tabs to determine forecasts and hour requirements.

To uniformly manage your stores, you or the business consultant can specify global values for functions such as forecasts and hour requirements at setup. The configuration process determines which functions can have global values set at the corporate level. For information on the configuration process, refer to the *OWS Integration Functional Guide 5.0.2*.

To modify global values, use the functions grouped under the Utilities module:

Drivers History

From this tab, you can view the data OWS uses to calculate the system forecasts.

Week Type

From this tab, you can assign week types to each calendar week. Week types are a key component in generating the data in the Forecast and Demand steps.

Distribution

From this tab, you can view how forecasts and hour requirements are distributed over a day or week. The data in this tab is directly tied to the data in the Drivers History and Actual Drivers tabs.

Time Window

From this tab, you can displays time frames. A time frame is a range of hours that is tied to a week type.

Properties

From this tab, you can modify activity, task, store, and derived driver parameters.

Actual Drivers

This tab displays the actual drivers imported into the OWS application.

Store Closing

 This tab displays the dates on which a store remains closed.

Note: A store manager can override these values to cover exceptions for individual stores.

DRIVERS HISTORY

| Drivers History | Week Type | Distribution | Time Window | Properties | Actual Drivers | Store Closing |

The Drivers History tab is located in the Utilities module. From this tab, you can view the data OWS uses to calculate the system forecasts. System forecasts form the basis of the Forecast step.

There are two types of forecasts:

- Those calculated directly by OWS.

- Those calculated by external applications and imported into OWS.

The former type of forecast appears in the Drivers History page, and the latter in the Forecasted Drivers page.

Drivers History

This page shows the data OWS uses to calculate the system forecasts it generates. To calculate the forecasts for a particular week, OWS uses historical data from weeks of the same type (for example, Christmas Week or Summer Week). You determine the number of weeks used for the forecast during the OWS setup.

- Drivers History Daily: Shows driver data for each day. This table displays if your store data allows this level of detail.

- Drivers History Weekly: Shows driver data for each week.

Forecasted Drivers

This page shows the driver forecasts that were generated by external applications and then imported into OWS. These forecasts are called "pre-forecasted" forecasts.

- Drivers Pre-Forecasted Daily: Shows driver data for each day. This table displays if your store data allows this level of detail.

- Drivers Pre-Forecasted Weekly: Shows driver data for each week.

See:

View Driver History
View Pre-Forecasted Drivers

WEEK TYPE

| Drivers History | Week Type | Distribution | Time Window | Properties | Actual Drivers | Store Closing |

The Week Type tab is located in the Utilities module. From this tab, you can assign week types to each calendar week. Week types are a key component in generating the data in the Forecast and Demand steps. The expected "behavior" of a given week is largely dependent on the week type you assign to it.

In some cases, you would use a single week type for multiple drivers, activities, or profiles. For example: You may wish to assign a week type called "Peak week" to the sales, transactions, and traffic drivers.

You can assign week types manually or automatically by creating rotations. The method you use depends on the driver, activity, or profile selected. If you are assigning week types manually, just enter the week type for each week. For week types that are based on a rotation, you can define or change the number of weeks and the week types in the rotation.

You can also define a new week type rotation.

See:

Manage Week Types

Utilities Overview

DISTRIBUTION

Drivers History	Week Type	Distribution	Time Window	Properties	Actual Drivers	Store Closing

The Distribution tab in the Utilities module displays the daily and weekly distribution profiles. Daily and weekly distribution profiles are based on cyclic profiles. However, to reflect an unpredictable event, you can edit the daily or weekly distribution profiles so that they apply only to a particular day or week.

For example: If the coming Thursday is declared as an emergency holiday and the store will be closed, you can modify the distribution profile values for the previous day (say, from 4 p.m. Wednesday) to indicate increased business. This is because more customers will visit the store on Wednesday to purchase items. The modified profile values impact only the day (Wednesday) for which it is defined. The daily or weekly distribution values impact the way OWS distributes the forecasts, hour requirements, and actual drivers over periods of time.

You can view these daily or weekly exceptions to the cyclic profiles in the Daily Distribution and the Weekly Distribution page.

Daily Distribution

The Dated Daily Profiles table displays all daily profiles for the date selected and their corresponding distribution values for every quarter of an hour. You can edit these values, if required. The changed profile values only applies to the days selected and not the whole profile cycle.

Weekly Distribution

The Dated Weekly Profiles table lists all weekly profiles and their corresponding distribution values for every day of the selected week. You can edit these values, if required. The changed profile values only applies to the days selected and not the whole profile cycle.

Update Distribution Rotation

If you want to change the profile for all days or weeks of the same type, you must use the Update Distribution Rotation link in the Distribution tab.

As the Functional Administrator, you must have created weekly and daily profiles at setup using the OWS Designer application. Profiles are specific to a driver, but in some cases you can use one profile for multiple drivers. Each profile is also tied to a week type. In general, the order of the profiles in the list follows the order of the week types they are tied to. Viewing the profile values can help you understand how forecasts are distributed. The profiles are also shown in the form of a graph at the bottom of the page.

The Update Distribution Rotation link contains two pages: Daily Distribution and Weekly Distribution. The data in these pages are directly tied to the Drivers History and Actual Drivers tabs.

- Daily Distribution

  The Drivers History Daily table (in Drivers History tab) displays the data OWS uses to generate daily forecasts. Since the hour requirements generated in Demand are calculated for each quarter hour, the daily forecast must be broken down into quarter hours using one of the profiles you select from the list.

- Weekly Distribution

The Drivers History Weekly table (in the Drivers History tab) displays the data OWS uses to generate weekly forecasts. Since driver forecasts are daily, OWS breaks down the weekly forecast into daily forecasts. This is performed using one of the profiles you select from the list.

You cannot modify the profile setup, but if necessary, you can edit the profile values provided by the system administrator.

See:

Actual Drivers

Drivers History

View Daily and Weekly Distribution Profiles

Update Distribution Profiles

Utilities Overview

TIME WINDOW

Drivers History	Week Type	Distribution	Time Window	Properties	Actual Drivers	Store Closing

The Time Window tab is located in the Utilities module. From this tab, you can view and edit time frames (such as, time frames for store hours or morning deliveries).

Time frame values are cyclic. You must link each time frame to a specific week type; though you may use the same time frame for more than one-week type.

The Time Window tab contains two pages: Time Window and Update Time Window.

Time Window

This page displays the hours for the selected time frame. From this page, you can make changes to a time frame for a given day.

Update Time Window

From this page, you can edit the hours in the time frame using the cyclic profiles. You can view your saved changes in the Time Window page.

See:

Delete Exceptional Changes to Time Frames

Make Exceptional Changes to Time Frames

Update Time Frame Profiles

Utilities Overview

View Time Frames

PROPERTIES

Drivers History	Week Type	Distribution	Time Window	Properties	Actual Drivers	Store Closing

The Properties tab is located in the Utilities module. Use this tab to modify the activity, task, store, and derived driver parameters.

The Properties tab contains four pages: Activity, Task, Store, and Driver.

Note: In most cases, you should not modify the default parameters. Changing the defaults without a thorough understanding of how these parameters work may result in a weekly schedule that does not meet your actual needs.

Activity

This page displays a number of parameters for each activity. You have defined the values of these parameters at setup, but if necessary, you can modify them to meet your specific requirements.

To edit an activity parameter, select the appropriate activity:

- Min Staffing and Max Staffing: Sets the minimum and maximum number of people you can schedule at a given time for the selected activity. For example: If your store has five cash registers, you can specify a minimum of one cashier per shift and a maximum of five.

- Min Duration: Defines the minimum amount of time you can schedule an employee for the selected activity.

- Activity Priority: Determines the priority level of each activity. Use this parameter if employee constraints prevent OWS from scheduling employees to all the activities required for the week. In this case, activities with the highest priority would have a greater chance of being covered than activities with a lower priority. 100 is the highest priority; 0 is the lowest priority.

Task

This page displays several task parameters. Tasks are components of each activity. You have defined the values of these parameters at setup, but if necessary, you can modify them to meet your specific requirements.

To edit a value, choose a task and select the appropriate cell. You can select one task at a time, or all the tasks combined.

Note: If you want to have the option of reusing the default values, write the default values down before modifying them. If you did not record the default values and wish to recover them, contact the system administrator.

- Compression Factor: In the Demand step, if the total number of hours exceeds the Budget for a given day, clicking Update Demand recalculates or "compresses" the hours so that each daily total does not exceed the assigned budget for that day. However, OWS does not compress all tasks proportionally. The compression factor defines the maximum level that the hours for a given task can be compressed. For example: A compression factor of 70% means that no more than 30% of the hours initially required for the task can be compressed. In this instance, a requirement of 100 hours cannot be compressed to less than 70 hours. A compression factor of 100% means the task cannot be compressed at all.

- Variable to Reduce Distribution (Mix Percent): You can break a task into several activities. Through the Variable to Reduce Distribution (VRD) parameter, you can control the way this breakdown occurs. VRDs range from 0 to 1. A value of 1 is equivalent to 100%. A value of less than 1 means that OWS translates the task into activities at a rate below that of the labor standard for that task. Through the VRDs, you can adjust how OWS applies the labor standard without actually modifying the standard itself.

- Labor Standard Parameters: Each task has a specific labor standard. The Labor Properties table shows the labor standard parameters OWS uses for each task. An empty cell means the parameter in question is not used for that task. From this table, you can modify the labor standard parameters for each task.

Store

This page displays a number of parameters that are specific to a store. You have defined the values of these parameters at setup, but if necessary, you can modify them to meet your specific requirements.

- Store Property: Store properties represent "physical" characteristics specific to a store. Store parameters are generally constant. Factors such as business levels or week types do not greatly affect store parameters. The Store Property drivers use the store parameters in the Forecast step. An example of a store parameter is the surface area of a store. More than any business factor, it is the surface area that affects how many hours it takes to clean the store.

You can state store parameters using numeric values or boolean values (Yes/No). This parameter provides two separate grids for each of the two types.

- Additional Hours: Additional Hours are extra hours that typically an administrator (Operations, Functional or System administrator, based on your setup), district manager, or other corporate roles grant in addition to the store budget defined in the Demand Summary tab. OWS does not include Additional Hours when generating the schedule. The store manager specifies them manually, generally after optimization.

- Productivity Fatigue and Delay (PFD): The Productivity Fatigue and Delay factor is an allowance for fatigue and reduced performance that can occur over time when performing certain physical activities. The PFD factor increases the number of hours that would normally be scheduled.

A PFD factor can apply to the entire store, or it can be department-specific. PFD factors do not affect Special Fixed Activities. For example: Unloading 1000 items from a truck may typically take 2 hours. However, it might take 2.5 hours if the store has a damaged freight elevator (PFD greater than 1).

Driver

In some cases, you may determine that a driver needs be calculated based on another driver. Drivers calculated in this way are called derived drivers.

OWS calculates a derived driver by multiplying or dividing the value of the driver on which it is based by a coefficient. From this page, you can view or edit the coefficient.

See:

Edit Activity Parameters

Edit Derived Drivers

Edit Store Parameters

Edit Task Parameters

Utilities Overview

ACTUAL DRIVERS

Drivers History	Week Type	Distribution	Time Window	Properties	Actual Drivers	Store Closing

The Actual Drivers tab is located in the Utilities module. Actual drivers are the real values of drivers recorded by the external application 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 drivers to calculate the Earned Hours data, which displays on the Dashboard.

Actual Daily Driver

Shows actual driver data per day. You can define this level of detail during the OWS setup.

Actual Weekly Driver

When the imported actual driver data is weekly, it displays in this table. To translate it into the Earned Hours data, OWS automatically breaks down the weekly data into daily data based on distribution profiles.

See:

Distribution

Utilities Overview

STORE CLOSING

Drivers History	Week Type	Distribution	Time Window	Properties	Actual Drivers	Store Closing

The Store Closing tab is located in the Utilities module. You can use this tab to define the dates on which a store will remain closed for business and also specify the impact on the drivers, activities, and employees of the store. On these dates, OWS calculates the forecasts and the driver values, and sets the demand for not-enabled activities to zero.

You can express the impact of the store closure as a percentage. Impacts can be positive or negative. For instance, a back-to-school event would have a positive impact, indicating increased business. However, if a store is being renovated, the impact value would probably be negative. OWS uses this percentage to automatically calculate the impact on the affected drivers. Store managers can modify the values manually for each day and each affected driver, if necessary.

Additionally, you can select the activities that have to be performed and the employees who may be required to work on the day the store is closed.

Store Closing Impact

The impact of the store closing is measured in percentages. OWS uses this value to automatically calculate the impact on the drivers.

Drivers Impact

The Drivers Impact refers to the drivers that are impacted due to the store closing.

Enabled Activities

Enabled Activities are those activities that have to be performed on the days the store is closed for business. Examples of activities include opening of the store by authorized employees (key holders) and maintenance of perishable food items such as meat and fish.

OWS calculates the hour requirements in the Demand step only for those activities that you select in this table.

Enabled Employees

Enabled Employees are those who may be required to work on the day the store is closed.
For example: You may close a store to conduct an inventory and so need some employees for this activity.

OWS creates schedules only for the employees whom you select in the Enabled Employees table, for the day the store is closed.

See:

Close a Store for a Specific Day

Utilities Overview

VIEW DRIVER HISTORY

From the Drivers History tab, you can view the data OWS uses to calculate the system forecasts.

To view driver history:

1. Open the Drivers History page:
   Utilities > Drivers History tab > Drivers History

2. Select a date in the application bar.
   The Drivers History Weekly table appears at the bottom of the page. The Drivers History Daily table may also appear, depending on the level of detail of your store data system.

See:

Drivers History

View Pre-Forecasted Drivers

VIEW PRE-FORECASTED DRIVERS

From the Drivers History tab you can view the driver forecasts generated by external applications and imported directly into OWS.

To view a pre-forecasted driver forecast:

1. Open the Forecasted Drivers page:
   Utilities > Drivers History tab > Forecasted Drivers

2. Select a date in the application bar.
   The Driver Pre-Forecasted Weekly table appears at the bottom of the page. The Driver Pre-Forecasted Daily table may also appear, depending on the level of detail of the store data system.

See:

Drivers History

View Driver History

MANAGE WEEK TYPES

You can assign week types to week models manually or automatically using rotations. The method you use depends on the week model you select. You can edit existing week type rotations or create new ones.

To assign week types:

1. Click the Week Type tab:
   Utilities > Week Type tab

2. Click to select a week model.
   If the Update Type Rotation link appears at the bottom of the page, then OWS assigns the selected week model to the week types (based on a cyclic rotation).
   See: To edit a week type rotation
   If no link appears at the bottom of the page, you can manually edit the week types.
   See: To assign a week type manually

3. Select a week type from the Week Type table to assign it to a week.

To edit a week type rotation

The Update Week Type Rotation link appears at the bottom of the page.

1. Click Update Week Type Rotation.

   The Rotations page opens, listing all the rotations for the week model.

   - To change the number of weeks in the rotation, click directly in the Number of Weeks field and change the number.

   - To erase a rotation, click To delete on the line of that rotation.

2. Click Next.

   The Rotation Description page opens. There is a line for each week in the current rotation.
   Note: If you are erasing a rotation, the Rotation Assignment page displays. Proceed to Step 6.

3. Using the list in the first line, change the week type for the first week in the rotation.

4. Repeat step 3 for each week in the rotation.

5. Click Next.

   If there are several rotations, the next rotation is displayed. Edit the rotation and click Next.

   If you have finished editing all the rotations, the Rotation Assignment page appears.

6. If you are defining a new week type rotation, click and select a range from the dialog box. Else, proceed to step 7.

7. To choose which week the rotation starts on, select the rotation type from the list and enter a value in Offset.

   A value of 1 means the rotation starts on week 1, a value of 2 that the rotation starts on week 2, and so on.

8. Click Finish to confirm your changes.

To assign a week type manually:

No link appears at the bottom of the page.

1. In the Week Type table, enter a week type for each week displayed.

2. On the application bar, click to save your changes.

To define a new week type rotation:

1. Click the Week Type tab:
   Utilities > Week Type

2. Click [icon] to select a week model.

3. Click Update Week Type Rotation.
   The Rotations page opens, listing all the existing rotations for the week model.

4. Click [+ icon] .
   A new line appears at the bottom of the table.

5. Enter the name of the new rotation.

6. Enter the number of weeks to be included in the new rotation.

7. Click Next.

8. Proceed as when editing a rotation.
   See from step 6 of To edit a week type rotation

See

Week Type

VIEW DISTRIBUTION PROFILES

Viewing the daily and weekly distribution profiles helps you understand how OWS breaks down the daily and weekly forecasts into hours and days.

To view a daily distribution profile:

1. Open the Daily Distribution page:

   Utilities > Distribution tab > Daily Distribution

2. View distribution profile values for every quarter hour of the day in the Dated Daily Profiles table.
   Note: Use the horizontal scroll bar below the table to view the values that are outside the area of your page.

   Percentages are expressed as a fraction of 1. For example, 0.01 means 1%.

To view a weekly distribution profile:

1. Open the Weekly Distribution page:

   Utilities > Distribution tab > Weekly Distribution

2. View distribution profile values for every day of the week in the Dated Weekly Profiles table.
   Percentages are expressed as a fraction of 1. For example, 0.10 means 10%.

See:

Distribution

Utilities Overview

Update Distribution Profiles

MAKE A DAILY OR WEEKLY EXCEPTION TO THE DISTRIBUTION PROFILE

From the Daily or Weekly Distribution page, you can make exceptional changes to distribution profiles. Distribution profiles are based on cyclic profiles. This procedure overrides the values generated by the cyclic profiles.

The new value only applies to the day or week you specify.

To make a daily exception to a cyclic profile:

1. Open the Daily Distribution page:

   Utilities > Distribution tab > Daily Distribution

2. Select the appropriate cell in the Dated Daily Profiles table and change its value.
   Note: This value applies only to the quarter hour of the day that you specify.

3. On the application bar, click 🖫 to save your changes.

To make a weekly exception to a cyclic profile:

1. Open the Weekly Distribution page:

   Utilities > Distribution tab > Weekly Distribution

2. Select the appropriate cell in the Dated Weekly Profiles table and change its value.
   Note: This value applies only to the day that you specify.

3. On the application bar, click 🖫 to save your changes.

See:

Utilities Overview

Updating Distribution Profiles

Distribution

UPDATE DISTRIBUTION PROFILES

From the Daily or Weekly Distribution screen, you can update distribution profiles. Daily and weekly distribution profiles are based on cyclic profiles.

Updating a daily distribution profile consists of changing the profile for all days of the same week type. Likewise, updating a weekly distribution profile consists of changing the profile for all weeks of the same week type.

To update a daily distribution profile:

1. Click Update Distribution Rotation.
   Utilities > Distribution tab

2. Click ![icon] to select a daily profile.

3. Select a cell in the Daily Profiles table to change the percentage for that quarter hour.
   Repeat this step for each cell you want to edit.
   Use the horizontal scroll bar below the table to view quarter hours that are outside the area of your page.

4. On the application bar, click ![icon] to save your changes.

To update a weekly distribution profile:

1. Click Update Distribution Rotation:
   Utilities > Distribution tab >Weekly Distribution

2. Click ![icon] to select a weekly profile.

3. Select a cell in the Weekly Profiles table to change the percentage for that day.
   Repeat this step for each cell you want to edit.

4. On the application bar, click ![icon] to save your changes.

See:

Distribution

Utilities Overview

Make a Daily or Weekly Exception to the Distribution Profile

VIEW TIME FRAMES

From the Time Window screen, you can view the time frame values. You must link each time frame to a specific week type; though you may use the same time frame for more than one week type.

To view a time frame:

1. Open the Time Window page:
   Utilities > Time Window tab > Time Window

2. Click ![icon] to select a time frame.
   The hours for the selected time frame appear in the Time Window table.

See:

Distribution

Delete Exceptional Changes to Time Frames

Make Exceptional Changes to Time Frames

Time Window

Update Time Frame Profiles

Utilities Overview

MAKE EXCEPTIONAL CHANGES TO TIME FRAMES

From the Time Window page, you can make exceptional changes to time frames. Time frames are based on cyclic profiles. This procedure overrides the values generated by these cyclic profiles. The new value only applies to the day you specified.

To make an exceptional change to a time frame:

1. Open the Time Window page:
   Utilities > Time Window tab > Time Window

2. Click ![icon] to select a time frame.
   The hours for the selected time frame appear in the Time Window table.

3. Double-click the appropriate cell in the Time Window table to change its value.
   The Oracle - Workforce Scheduling Web Page Dialog box displays.

4. Change the start and the end time and click Update.

5. Click OK.
   The change is shown in the Time Window table.

6. On the application bar, click ![icon] to save your changes.

See:

Distribution

Delete Exceptional Changes to Time Frames

Time Window

Update Time Frame Profiles

Utilities Overview

View Time Frames

DELETE EXCEPTIONAL CHANGES TO TIME FRAMES

The Time Window page enables you to make exceptional changes to time frames. You can also delete exceptional changes.

To delete an exceptional change to a time frame:

1. Open the Time Window page:
   Utilities > Time Window tab > Time Window

2. Click ![icon] to select a time frame.
   The hours for the selected time frame appear in the Time Window table.

3. Double-click the cell of the exceptional change that you want to delete.

4. In the OWS - Web Page Dialog box, click ![icon] on the line of the exceptional change you want to delete.

5. Click OK.
   The change is shown in the Time Window table.

6. On the application bar, click ![icon] to save your changes.

See:

Distribution

Make Exceptional Changes to Time Frames

Time Window

Utilities Overview

View Time Frames

UPDATE TIME FRAME PROFILES

The Update Time Window page enables you to update time frame profiles. The changes you make to the time frame profiles are cyclic.

To update a time frame profile:

1. Open the Update Time Window page:
   Utilities > Time Window tab > Update Time Window

2. Select a week type.

3. Edit the Start and End hours.
   If there are no hours for a given day of the week, select the check box for that day.

4. On the application bar, click ⬚ to save your changes.

   The Time Window screen updates.

See:

Delete Exceptional Changes to Time Frames

Make Exceptional Changes to Time Frames

Time Window

Utilities Overview

View Time Frames

Distribution

EDIT ACTIVITY PARAMETERS

From the Properties tab, you can edit the values of the parameters of each activity.

You can edit each parameter for a specific activity and a specific day. You can also edit the cyclic values of activity parameters.

To edit an activity parameter for a specific day:

1. Open the Activity page:
   Utilities > Properties tab > Activity

2. Click ⬚ to select an activity.

3. Click the cell of the appropriate date, and modify the parameter.

   • A blue triangle indicates an unmodified cyclic value in the daily table.

   • A red triangle indicates a modified cyclic value in the daily table.

Note: Any values you edit in this page override the cyclic values, even if you change the cyclic value afterwards.

4. On the application bar, click 🖫 to save your changes.

1. Open the Activity page:
    Utilities > Properties tab > Activity

2. Click 🔷 to select an activity.

3. Click Update Activity Properties.

4. Click 🔷 to select the same activity .
    The list displays the available parameters for the activity. You can also click the activity parameter directly if you just want to display one parameter.

5. Click the cell of the activity parameter you want to modify, and enter a new value.
    For Min Staffing, you can enter a different cyclic value for each day of the week. For all other parameters, the value entered applies to all the days of the week.
    Important: Any values you edit in the daily activity page override the cyclic values, even if you change the cyclic value afterwards.

6. On the application bar, click 🖫 to save your changes.

7. Click Back at the bottom of the page to return to the Activity page.

See:

Properties

Utilities Overview

EDIT TASK PARAMETERS

From the Properties tab, you can edit task parameters. You can edit each parameter for a specific activity.

To edit a task parameter:

1. Open the Task page:
    Utilities > Properties tab > Task

2. Click 🔷 to select a task.

3. Click the appropriate cell to modify the parameter.

4. On the application bar, click 🖫 to save your changes.

See:

Properties

Utilities Overview

EDIT STORE PARAMETERS

From the Properties tab, you can edit the values of store parameters. There are three types of store parameters:

- Store properties: "Physical" parameters that are specific to a store.

- Additional hours: Extra hours that you can grant in addition to the store budget.

- Productivity Fatigue and Delay (PFD): Allowance for reduced performance that occurs when performing certain physical activities.

To edit a store parameter:

1. Open the Store page:
   Utilities > Properties tab > Store

2. Select the parameter you want to edit and enter a value.
   Note: PFDs may be available for the entire store or for specific departments. Click on the application bar to select the store or department. To apply a PFD factor of 5%, enter a value of 1.05.
   A value of 1 is equivalent to no PFD factor. PFD factors do not affect Special Fixed Activities.

3. Repeat for all the parameters you want to edit.

4. On the application bar, click to save your changes.

See:

Properties

Utilities Overview

EDIT DERIVED DRIVERS

From the Derived Driver table, you can view and edit the coefficients of derived drivers. Derived drivers are drivers whose values OWS calculates based on other drivers.

To edit a derived driver:

1. Open the Driver page:
   Utilities > Properties tab > Driver

2. Click to select a Derived Driver.

3. Click the cell to modify the coefficient.

4. On the application bar, click to save your changes.

See:

Properties

Utilities Overview

CLOSE A STORE FOR A SPECIFIC DATE

From the Store Closing tab, you can select the days on which the store will remain closed for business. You can express the impact of the store closure as a percentage.

Additionally, you can select the activities that have to be performed and the employees who may be required to work on the day the store is closed.

To close a store on a specific day:

1. Click the Store Closing tab:

   Utilities > Store Closing

2. Select a date in the application bar.
   The Store Closing table displays the corresponding date.

3. Double-click in the appropriate cell to close the store on that day.

4. Enter the impact of the store closing in percentage, in the appropriate cell of the table.
   OWS uses this value to automatically calculate the impact on the drivers.

   Note: If required, you can edit the percentage of impact on the drivers.

5. Click the Enabled Activities tab.

6. Double-click in the appropriate cell to select the activity that has to be performed on the day.

7. Click the Enabled Employees tab.

8. Double-click in the appropriate cell to select the employee who will work on the day.

9. On the application bar, click to save your changes.

See:

Store Closing

Utilities Overview

Define Events

EVENTS OVERVIEW

Events Management	Hierarchy Event

A global event is a special event that has an impact on certain drivers. Special promotions, clearance sales, and holidays are examples of global events.

During the configuration process, you can define global events and assign these to levels of the organization and determine their impact on drivers such as sales.

Using the Events Management tab in the OWS application, you can similarly:

- Define a complete list of global events at a particular node in the organizational hierarchy.

- Determine the drivers affected by the event.

- Assign a level of impact as a percent amount.

- Specify the duration of the event as a single day or period of days.

See:

Define and Assign a Global Event

Edit a Global Event

Delete a Global Event

DEFINE AND ASSIGN GLOBAL EVENTS

Using the OWS application, you can define a complete list of global events. Clearance sales, special promotions, and holidays are examples of global events.

You can define a global event for a particular node in the organization hierarchy. All the stores below this node inherit this event. When you define the global event, you can assign it to any store within the hierarchy, determine the drivers affected by the event, assign a level of impact of the driver as a percent amount, and specify the duration (in days) of the driver impact.

For example: If you want to define a Summer Discount Sales for a number of stores simultaneously both at the district and the store level, then you can define the event at the appropriate node. All the stores below this level inherit this event for the specified duration.

To define a global event:

1. On the module bar, click Events.

2. On the application bar, select the appropriate business organization level.
   Note: All the stores below this level inherit the event that you define.

3. On the Events Management tab, click Search.
   The application displays the list of events that you defined previously.

4. Click ✚ to display the Event Definition wizard.

5. Enter a name for the event.

6. In the Drivers List, select a driver that the event impacts.

7. To select a second driver, click ✚ to add another row.

8. Select a driver from the list.
   Continue to repeat this step until you have selected all the drivers impacted by the event.

9. Click Next.
   The Day Impact List dialog box appears.
   The name of the driver appears at the top of the page.

10. Enter the level of impact as a percentage.
    Note: An impact is a positive or negative percentage of an existing driver forecast. A positive impact increases the driver forecast; a negative impact reduces the driver forecast. For example, an impact value of 8 for a Clearance Sales Event increases the sales for the day the event occurs by 8%.

11. To create an impact cycle over several days, click to add more days.
    Day 0 represents the first day of the cycle, Day 1 the second day, Day 2 the third day, and so on. You can add as many days to the cycle as you want.

12. Enter the level of impact as a percent amount for each day.

13. If you defined more than one driver, click Next to display the Day Impact List for the next driver. Enter the percentage for this driver, and if necessary, add more days to the cycle, following the instructions in the previous steps.

14. Click Next for the last driver.
    The application displays a summary that shows the impact values for each driver.

15. Click Finish to return to the Events Management tab.

16. Click Search to view the defined event.

To assign a global event to a specific store:

1. On the module bar, click Events.

2. On the application bar select the business organization level to which you want to assign the event.

3. Click the Hierarchy Event tab.

   The Events List displays the list of events you can declare.

4. In the History table, click
   The Create a Range window opens.

5. Enter the start and end dates.

   You can select infinity or enter a date range. The end date represents the day after the event ends.

6. Click OK to close the dialog box.

   A new line is added to the History table.

7. On this new line, select an event name from the list.

8. In the application bar, click to save your changes.

See:

Events Overview

EDIT A GLOBAL EVENT

You can edit the drivers assigned to the global event, change the level of impact of the driver (the percent amount), and the duration of the driver impact (in days).

To edit a global event:

1. On the module bar, click Events.

2. On the Events Management tab, click Search.
   The Events List displays the list of events previously defined.

3. Click Edit for the event you want to modify.
   The Event wizard opens.

   - To add a driver, click ➕ and select a driver from the drop down list. Repeat this step for each driver.

   - To remove a driver, click ✖

4. Click Next.

   - To change the impact value for a day, enter a different percentage.

   - To add days to the cycle, click ➕ for each new day.

   - To remove days from the cycle, click ✖ for each day you want to remove.

5. Click Next, and repeat the above step for each driver impact you want to edit.

6. Click Next for the last driver.
   The application displays a summary of the impact values for each driver you changed.

7. Click Finish to return to the Events Management tab.

See:

DELETE A GLOBAL EVENT

You can delete unwanted global events using the Events Management tab.

To delete a global event:

1. In the module bar, click Events.

2. In the Events Management tab, click Search.
   The Events List table displays the list of events previously defined.

3. Click ✖ for each event you want to delete.

4. On the application bar, click 💾 to save your changes.

See:

Global Events Definition

Define a Global Event

Edit a Global Event

Manage Employee Assignments
ASSIGN EMPLOYEES TO OTHER STORES

Assignment Management

You can change the store assignment for an employee.

To assign an employee to another store:

1. On the administrator's home page, click Assignments.

2. On the application bar, click ▥▾ to select a Team.

3. Select an employee from the Select Employee list.
   If you do not know the employee's name, enter a search criterion in the Employee Filtered Search table and click Search.
   The application displays a list of employees matching the search criteria.
   The application also displays the person's assignment history.

4. To reassign the employee, create a new row and click 🔑 to set the Start and End Dates for the new assignment.

5. Click Ok.
   The application starts a new row for the new assignment and enters an end date for the current assignment.

6. Click ▥▾ to select the team for the person's new assignment.
   The application lists the person's new assignment.

7. Click 💾 to save your changes.

Export Workforce Schedules and KPIs
EXPORT A WORKFORCE SCHEDULE

| Schedule | KPI |

The Export module enables you to export workforce schedules to other applications, such as Human Resources, Time and Labor, and Time and Attendance.

To export a workforce schedule:

You can specify the schedule type and the time period during which you want to export schedules from the Schedule tab.

1. On the application bar, select the level of hierarchy for which you want to export the schedule.

2. On the module bar, click Export.

3. In the Export window, click the Schedule tab.

4. Select the type of schedule:

    - Business: Exports the schedules of all employees who perform at least one activity in the organization level you selected from the 📊▾ list (application bar).

    - Team: Exports the schedules of all employees in the team you selected in the 📊▾ list (application bar).

5. Select a Start Date and End Date to specify the period of time during which you want to export schedules.

6. Select an export Frequency.
   The application exports the schedules based on this frequency throughout the period defined in the previous step.
   For example: If you chose a 2 month period and choose weekly, the application would export eight schedules.
   If you select a:

    - Monthly frequency: Select a number for the day of the month (1 to 28) on which to export the schedule from the Export Day Computation list.

    - Weekly frequency: Select the day of the week (Sunday to Saturday) on which to export the schedule, from the Export Day Computation list. You define the first day of the week during setup.

    - Daily frequency: Select Now from the Export Day Computation list. (The time format depends on the language specified during setup.)
      Note: The application automatically identifies and processes the export jobs for schedules where the day and time have already occurred.

7. Enter an Export Time for when the export process runs.

8. Click Create Export Job to export the schedule.

See:

Export Key Performance Indicators

EXPORT KEY PERFORMANCE INDICATORS

Schedule | **KPI**

The Export module enables you to export workforce key performance indicators (KPIs) to other applications, such as Human Resources, Time and Labor, and Time and Attendance. You can create an extract of daily or weekly key performance indicators. For example: You might create a weekly summary of the KPIs for all the stores in a given region.

Depending on the type of report you want to generate, you can specify the:

- Level of the hierarchy.
- Type of report.
- Date range the report covers.
- Number of KPIs included in the report.
- Scope of report (daily or weekly).

The application generates an XML file at the path specified during the configuration of the Integration Server, using the OWS Admin application.

To export workforce KPIs:

1. On the application bar, select the level of hierarchy for the extract.
2. On the module bar, click Export.
3. Click the KPI tab.
4. Select a Type:
    - Summary extract: Exports data for the node that you selected in the hierarchy.
    - Distribution extract: Exports data for the node that you selected in the hierarchy and for any of the nodes that fall below it.
    - Detail Extract: Exports data for the node that you selected from the Level BU or Level Team list. (The items that appear on the Level BU and Level Team list depend on the node you selected for the hierarchy.)
5. Select a Start and End Date to specify the period that you want the extract to cover.
6. Click Day to obtain KPIs for each day during the specified period or Week for each week that falls within the period.
7. Select the KPIs to export:
    - Click All to export all the KPIs.
    - Click Custom to export selected KPIs.
8. Select a KPI from the list of available KPIs, and click Add to include it in the list of KPIs to export. (If you change your mind, you can select a KPI from your customized list and click Remove.)
9. Click Export to export the KPI report.

See:

Export a Workforce Schedule

Launch Weekly Process

PROCESS OVERVIEW

Process

You can coordinate and easily update information for all your stores using the Process tab. The Process tab includes two buttons that launch processes for the stores that fall under the selected node of the business hierarchy:

- Launch Weekly Process Batch: Launches the Update Forecast, Create Schedule, and Update KPIs weekly processes for each store that falls under the selected business organization node. Store managers can then view the results of these weekly processes.

- Launch Earned Hours Batch: Updates the earned hours, actual hours, and the corresponding hours efficiency ratio. The amounts cover the period from the first day of the week to the day selected in the calendar.

See:

Launch a Process

Launch a Process

You can launch processes for the stores that fall under the selected node of the business hierarchy, by using either the Launch Weekly Process Batch or the Launch Earned Hours Batch button.

To launch a process:

1. From the application bar, select a date on which to run the processes.

2. On the administrator's home page, click to display the business hierarchy.

3. Select the node directly above the stores for which you want to launch the weekly process.

4. On the module bar, click Process.

5. Click the button that corresponds to the process you want to launch.

See:

Process Overview

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 external application 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 an application. 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.

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.

N

Non-forecasted drivers: Drivers that are not forecasted by the OWS application 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 applications 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: Refers to the 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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