

Oracle® Workforce Scheduling

User Guide for Operations Administrators

Release 5.0.2 for Windows

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Oracle® Workforce Scheduling User Guide for Operations 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 pages described in this help. Furthermore, you may have read-only access to certain pages.

See:

[Using the Online Help](#)
[Role of Operations Administrator](#)

ROLE OF OPERATIONS 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.

Operations administrators in OWS define the organizational structure of the enterprise and create logins for the various user roles.

Activities

Operations administrators have the following responsibilities:

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

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 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. |

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](#)

Logins

USER ROLES AND LOGINS

[Search Login](#)

[Create Login](#)

[Create Login Group](#)

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

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

OWS includes four main roles:

1. **Corporate** users can view consolidated KPIs at all levels of the organization. Access is read-only.
2. **Administrators**, whose functional responsibilities include:
 - Organization management for managing hierarchies and logins.
 - Store management for managing global functions related to the store, such as defining global values for contracts and events, opening new stores, exporting schedules, and running weekly processes.

Note: 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.

3. **District Managers** can view all the stores within their district. Access is read-only.
4. **Managers** can view and work on the stores associated to their login. A store manager creates schedules.

See:

[Search for a Login](#)

[Create a Login Group](#)

[Create a Login](#)

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](#)

The functional administrator represents the business organization in OWS by importing the information defined during the configuration of organizational hierarchy. (The OWS Designer tool is used to configure the hierarchy of an organization.)

The import process creates the business and team hierarchies, the stores including the business information (activities, tasks, drivers) and also the team information (contracts, teams) related to the store.

Note: For information on the configuration process, refer to the *OWS Integration Functional Guide 5.0.2*.

Using Oracle Workforce Scheduling, you can then manage the organization:

- Modify the business and team hierarchies.
- Create logins for your users.

See:

[Create a Node](#)

[Change a Business Node](#)

[Change a Team Node](#)

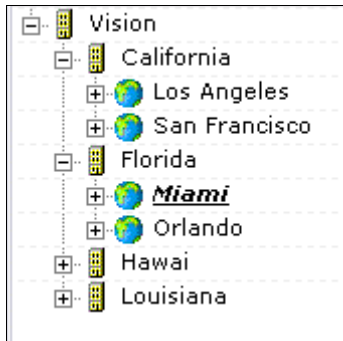
HIERARCHY MANAGEMENT

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 which employees work for which 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.
Data import programs use this code as an identifier.
Note: Refer to the documentation in the OWS Interface Development Kit (OWS IDK) for information on data definition.
5. Select the Node Type, Business Store Type, and Team Store Type from the lists.
The types 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. A store type comprises one business type and one HR type.
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.

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 $-\infty$ (infinity) for the start date and $+\infty$ (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](#)

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 the 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.

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 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: 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 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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