Oracle® Workforce Scheduling

User Guide for

Corporate Application Administrators

Release 5.0.3 Minipack A for Windows

Part No. E15216-01

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ORACLE®

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Table of Contents

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 labor demand 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 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, or have read-only access to certain pages. The availability of the weekly or long term process depends on the configuration implemented by your administrator.

See:
Using the Online Help
Role of Corporate Application Administrators

Home Page

ROLE OF CORPORATE APPLICATIONS ADMINISTRATORS

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

Corporate application administrators typically perform the activities of the functional administrators and store managers. They have the following responsibilities:

- Run the weekly and long term process, if long term processing is enabled.
  Step 1: Forecast
- Work with employee information.
  Employee Maintenance
- View global values at the corporate level for forecasts and hour requirements.
  Utilities
- Define a complete list of global events at a particular node in the organizational hierarchy.
  Events Management
- Manage jobs
  Job Management
- Schedule jobs
  Job Scheduler Overview

See:
Home Page

APPLICATION BAR

Return to the OWS 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.

HOME PAGE

When you start the OWS application, the home page opens. The home page contains different applications: the application bar, the module bar, the Weekly and Long Term Process bars, and the To-Do List. (The exact configuration varies, depending on whether the administrator enabled weekly and long term scheduling and added To-Do lists to the home page.)

Application Bar

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

See: Application Bar

Module Bar

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

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

Note: The role assigned your login determines which modules and pages you can access and view.

Weekly Process and Long Term Process Bars

From this bar, you can navigate to any of the five steps in the Weekly Process and Long Term Process to complete the scheduling steps. (The availability of the weekly process or long term process depends on the configuration implemented by your administrator.)

See: Navigating the Scheduling Process

Performance Summary

The Performance Summary provides data for the current week for the entire store. You can view your store performance in both grid and graph form.

- **Budget** is the sales budget set at corporate level. It is the same value as displayed on the Budget Sales line on the Forecast Summary page.
- **Forecast** is your personal sales forecast for that week. It is the same value as displayed on the Adjusted Forecast line in the Forecast Summary page.
- **Actual** represents the actual sales generated by the store. The Integration Server imports this figure from the store system. For this reason, there is no data yet for the current and subsequent dates.

To change the week displayed, select another date on the application bar.

Department Weekly Process Status

If your administrator has allocated responsibility for the steps of the weekly and long term process to the store and department manager, you can view the progress of the weekly and long term process in a status window. The status window indicates the step in the process that each department has reached, such as the Demand step or Scheduling step.

To-Do List

The To-Do List contains notifications that you can close after reading them or confirming the impact on the store. You can delete the notifications 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:

- Steps completed in the weekly process
- Data imported, such as actual sales or scheduled absences
- Employees on loan to your store or department and employees lent to another location
- Jobs that have been run
- Information that has changed at the corporate, store, or department level relating to activity or task properties or to employee information, such as store closings for inventory management, changes to contracts and break rules

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 on the application bar. The help page corresponding to the current page displays.
- To access the Contents, Index, and Search functions, click Show.
- There are two basic types of help pages: organizing concept pages and procedure pages. The bottom of each organizing concept page contains links to the relevant procedure pages. You can also return to the concept page directly from the procedure page.

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

See:
Home Page

Understanding OWS

UNDERSTANDING THE SCHEDULING PROCESS

The scheduling process is the core of OWS. It is the part of the application you use to generate your weekly and long term schedules. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) The scheduling process consists of five steps: Forecast, Demand, Check, Schedule, and Post.

The steps of the scheduling process that you can perform or view depend on the role associated with your login and the access rights assigned that role. For example, in a store with several departments and sub-departments, the company might grant store managers the responsibility for the demand, department managers the responsibility to schedule the employees in their department, and shared responsibility for the remaining steps.

OWS is designed to produce:

- An optimized schedules for a period of one week, the period over which most retail and similar industries perform their detailed workload demand and staff allocation process.
- An optimized long term schedule for a year that enables managers to notify their staff of the projected work hours for each week a year in advance.

How the Process Works

You can generate a weekly and long term schedule that is customized for your human resources needs. To obtain this schedule:

1. For the Weekly Process, your daily forecasts for a given week are first translated into hourly requirements for each activity.

   For the Long Term Process, your weekly forecasts for a given year are first translated into daily or weekly requirements and then displayed as weekly totals in demand hours or cost.

   OWS performs the calculation from forecasts to daily and hourly requirements based on predefined labor standards.
2. Before generating the schedule, you run a pre-scheduling check to verify the consistency of your employee data.
3. Once you have resolved any inconsistencies, OWS generates the optimized schedule. In this step, OWS matches the requirements for the store against comprehensive employee data for each of your employees. OWS checks to see whether your employees have the skills and work availability to meet your specific schedule requirements.
4. OWS generates alerts to notify you of each case where your workforce is unable to meet your daily and hourly requirements. These alerts give you a description of the problems so that you can resolve them.
5. When you have resolved all critical alerts, OWS can generate the final optimized schedule The result is a schedule for each quarter hour of the week (weekly

schedule) and each day of the week (long term schedule). You can then post the schedule.

Flexibility

While the scheduling process is highly automated, it is also highly flexible. You can customize, add, or modify data at each step. At the beginning of the process, you can customize forecasts. Once OWS has translated the forecasts into hours and days, you can schedule hours for activities that must be performed at a specific time, or you can schedule special activities for specific employees. And even after the optimized schedule has been generated, you can still make changes to the schedules of individual employees.

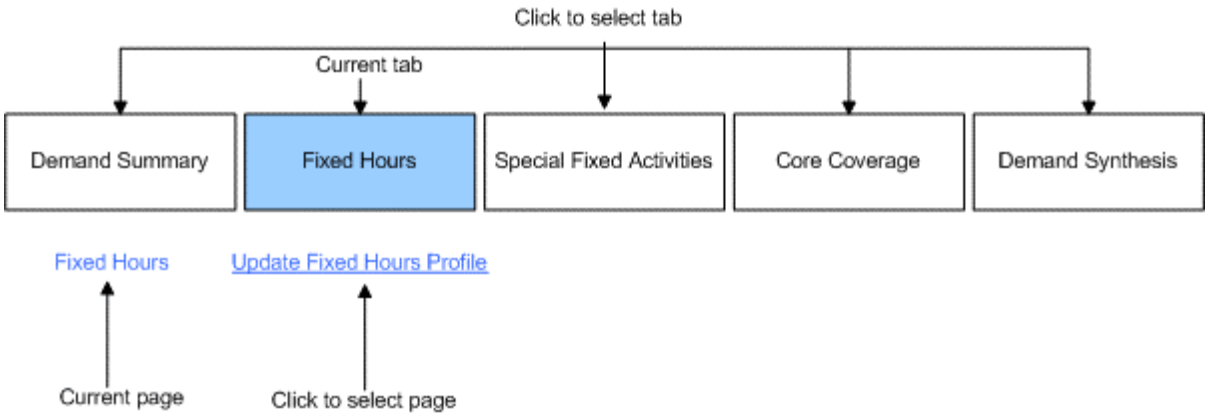
See:

Navigating the Scheduling Process
Step 1: Forecast
Step 2: Demand
Step 3: Check
Step 4: Schedule
Step 5: Post

NAVIGATING THE SCHEDULING PROCESS

The weekly process and long term process afford flexibility for navigating between the steps. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) The steps are numbered 1 through 5 because you must complete them in that order. You cannot commit data in one step until all the previous steps have been completed. However, you can skip between the steps to view data or perform simulations. To resume the scheduling process, return to the last uncommitted step (current step).

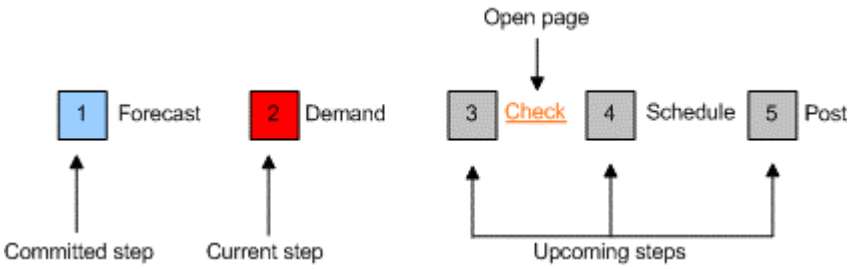
The navigation bar uses a color-coded system to let you know where you are in the process at any given time. For example, the weekly process navigation bar for the Schedule Demand step displays the following tabs:



Committed Steps	The data in these steps has been committed. You can return to a committed step at any time to view it, but OWS does not apply any changes you make. If you make changes and commit the data, you have to start the process again from that point.
Current Step	The next step to be committed. You cannot commit subsequent steps until the current step is committed. Once committed, the next step becomes the current step.
Upcoming Steps	All steps after the current step.
Open Page	In most cases, the page you are viewing will be the current step. However, you can jump to other steps to view other pages. In the image above, step 2 is the current step, but the user is viewing step 3 in order to simulate a check before actually committing the data in step 2.

Each step contains one or more tabs. When you click a step in the navigation bar, the step opens (by default) on the first tab to the left.

In the image below, the current tab is shown in blue, while the other tabs appear in gray. To go to another tab, click it. In addition, some tabs contain more than one page. When you open a tab, the default page is the name to the left. To change pages, click the underlined text.



Zoom

You can use the zoom icon to display the data within a specific period of time. Click  the zoom icon and then choose the time period for viewing the information displayed on the page, such as quarter, month, week.

Job Status

Depending on the configuration, the application displays the optimization status as a text message at the top of the page or as an icon next to the corresponding job button with an icon tool tip that provides details about the status of the job.

For example: The "Job never launched" message appears if you have not optimized a schedule. If optimization is in progress, a message informs you of your position in the job queue. If the application has completed the job, a message informs you when the job successfully finished. Click the job status refresh icon to update the job status information next to each button.

See:
Home Page

DEPARTMENTAL SCHEDULING PROCESS

For stores with multiple departments, it is important that the management staff running the scheduling process has the appropriate level of knowledge and authority. The administrator establishes this division of responsibility during setup by defining roles with access, view, and edit rights, and then assigns these roles to the appropriate people. The role associated to the login determines which steps of the scheduling process a store or department manager can complete. The administrator can assign:

- Sole responsibility to the store or department manager for each step of the scheduling process
- Sole responsibility to the store or department manager for the Demand and Schedule steps, and then shared responsibility for the Forecast, Check, and Post steps.

  For example, in a store with several departments and sub-departments, the store managers would generate the forecast and demand, and the department managers would schedule the employees in their department, because they work more closely with their teams.

Monitoring Progress

To help store and department managers monitor the progress of the scheduling process, the application supplies the following feedback:

- Department Status for the weekly and long term process (The availability of the weekly or long term process depends on the configuration implemented by your administrator.)

  Store managers can review the progress of the weekly and long term process in a status window on their Home page when at least one step of the scheduling process is managed at the department level. The status window includes a row for each department and indicates the step in the scheduling process that each department has reached. The step highlighted in the process bar at the store level corresponds to the step reached by all the departments in the status window. For example, if all the departments have completed the Check step, but only two have completed the Scheduling step, the process bar for the store highlights the Check step.
- Process buttons

  The application removes or disables the Update and Confirm and Proceed buttons when you cannot complete the step because your role has view privileges only, or another manager must complete a step. On pages where more than one manager must complete a prior step, the Confirm and Proceed buttons are disabled when at the:

  - Store or department level, the previous step has not been completed
  - Store level, a step is shared, and one of the departments has not completed the step
  - Department level, the previous step is shared or managed at the store level, and the step has not been completed

- To-Do List notifications

  Managers receive notifications when a step is confirmed.

STEP 1: FORECAST

The Forecast step is the first step in the scheduling process. Forecasts are estimates about various requirements and events occurring during the week that might impact your store and staffing schedules. How many customers do you expect each day this week? What shipments are scheduled to arrive and when? Are there any holidays that might cause an increase in customers? Will any of your staff be observing those holidays as well?

At the Forecast stage, you create, customize, view, and commit daily forecasts.

Drivers

You can request forecasts for a wide range of topics. You can forecast sales, store traffic, number of transactions, number of crates received, and so on. Each of these areas is called a driver. Depending on the driver, the forecast can be in dollars, number of people, number of boxes, and so on.

There are two basic types of drivers:

- Forecasted drivers

  These forecasts are either calculated by OWS using statistical methods or generated by external applications and imported directly into OWS. You can customize the forecasts of forecasted drivers based on your store-specific knowledge.

- Non-forecasted drivers

  These drivers are not forecasted by OWS because they are too unpredictable or store-specific. Store managers can view the driver defaults and provide overrides.

Forecast Step Tabs

The Forecast step contains pages that provide information about the forecast:

- Forecast Summary: View store budget determined at corporate level, view forecasts, customize forecast
- System Forecast: View forecasts produced by OWS
- Non-Forecasted Drivers: View and customize drivers not forecasted by OWS
- Store Property Drivers: Customize drivers based on physical aspects of the store, such as square footage that might impact frequency or volume of shipments

The Weekly Process includes two other pages:

- Store Event: Forecast daily impact of special events
- Hierarchy Event: Declare an event

Proceeding to the Next Step

You can proceed to the next step when you have:

- Viewed the forecasts.
- Optionally, customized forecasts for forecasted drivers.
- Optionally, entered forecasts for non forecasted drivers.
- Optionally, entered forecasts for store property drivers.
- Optionally, forecasted special store events.

When your forecasts are ready to be converted into hours, you can proceed to the next step: Demand.

See:
Editing Non-Forecasted Driver Forecasts
Forecast Summary
Viewing Non-Forecasted Driver Forecasts

STEP 2: DEMAND

The Demand step is the second step in the scheduling. OWS generates the hours required to perform each daily (weekly process) or weekly activity (long term process). OWS calculates these hours based on the driver forecasts in the Forecast step.

You can also manually schedule activities that have specific requirements, such as fixed hours activities and Special Fixed Activities (in the weekly process) where you assign activities to people.

Translating Forecasts into Hour Requirements

To obtain the daily and weekly hour requirements for each activity based on the forecasts, OWS applies a specific labor standard, translating the forecast into a number of hours in one or more activities.

As an example, the labor standard for boxes may state that 100 boxes received generates 1 hour of unloading and 2 hours of stocking. If the box forecast in the Forecast step is 200 for a given day, then the forecast is translated into 2 hours of unloading activity and 4 hours of stocking activity in the Demand step.

Scheduling Specific Hours

While this forecast-to-hours system covers most scheduling requirements, you can use the Demand step to cover additional hours. For example, you may need to schedule:

- Hours to cover a time window for unloading deliveries before the store opens
- Meetings or training sessions, and define the attendees before you optimize the schedule

Demand Step Tabs

The Demand step contains several tabs to view and schedule hours to meet the forecasted demand:

- Demand Summary: View the budget in hours (imported directly or calculated), Activity requirements in hours, generated directly from the forecasts, specific hours scheduled using the other tabs
- Fixed Hours: Schedule cyclic activities that require a specific number of hours for a specific number of persons, within a given time range
- Special Fixed Activities: Schedule hours for activities involving a specific person at a specific time
- Core Coverage: Schedule core activities
- Demand synthesis: View the workload of an activity, graphically

Proceeding to the Next Step

You can proceed to the next step when you have:

- Viewed the hour requirements for the week.
- Optionally, scheduled fixed hours.
- Optionally, scheduled special fixed activities.
- Optionally, scheduled core activities.
- Optionally, viewed the workload value of a specific activity or the consolidated values for all activities of a store using a graph.

Before generating the schedule, you need to check for scheduling problems. Go to the next step: Check.

See:
Demand Summary

STEP 3: CHECK

The Check step is the third step in the Weekly and Long Term Process. At this stage, you run the Pre-Scheduling Check to identify potential scheduling problems and then resolve them. You can also schedule absences and make exceptional changes to employee availabilities.

Running the Pre-Scheduling Check

When you finish the Demand step, you know all the hours you require, day by day, for each activity in the selected week. At this point, you run a check before you generate the schedule. This check identifies potential scheduling problems due to conflicts in employee data. By running this check before you actually generate the schedule, you avoid having to re-generate it unnecessarily.

Removing Conflicts

When OWS finds a conflict, it generates an alert. Each alert contains specific information concerning the origin of the problem. You can then remove the inconsistency and run the check again. You cannot generate the schedule until you have resolved all critical alerts.

Editing Employee Availabilities and Scheduling Absences

The schedule displays each employee's hourly availability. You can make changes to these defaults on a daily basis, and you can also schedule employee absences. In general, you should make these changes to employee availabilities before running the pre-scheduling check, so that it can detect any resulting problems. Otherwise, you will have to run the check a second time.

Weekly Process Check Step

The Check step contains two tabs:

- Pre-Schedule Check: Use to make exceptional changes to employee availabilities, to schedule absences, to run an employee data consistency check, and to view and solve any critical problems generated by the consistency check
- Demand Synthesis: Use to view the workload of an activity, graphically each day of the selected week

Long Term Process Check Step

The Check step contains three tabs:

- Pre-Schedule Check: Use to make exceptional changes to employee availabilities, to schedule absences, to run an employee data consistency check, and to view and solve any critical problems generated by the consistency check
- Demand Synthesis: Use to view the total workload of an activity, graphically for each week of the year
- Team Potential: Use to assess the total workload compared to the number of hours the team can potentially work (minimum and maximum weekly work duration).

Proceeding to the Next Step

You can proceed to the next step after you have:

- Optionally, made exceptional changes to employee availabilities.
- Optionally, scheduled absences.
- Run the Pre-Scheduling Check.
- Solved any critical conflicts.
- Optionally, viewed the workload value of a specific activity or the consolidated values for all activities of a store using a graph.

In the next step, you can generate the optimized schedule. See: Schedule.

See:
Pre-Scheduling Check

STEP 4: SCHEDULE

The Schedule step is the fourth step in the scheduling process. At this stage, you submit your schedule to OWS for optimization. Once OWS has generated the schedule, you can assess it from a number of dashboards and make further changes, if required.

Generating the Optimized Schedule

To generate an optimized schedule, OWS compares your requirements calculated during the Demand step to your workforce resources. OWS assigns the most qualified employees to each shift, based on their skills and availability and your store's forecasted requirements.

Assessing the Schedule

Once you have your optimized schedule, in the weekly schedule, you can see the activities of each employee for every quarter hour of the week; and if long term scheduling is enabled, in the long term schedule, you can see the different types of work weeks assigned to each employee during the year.

OWS provides a number of tools and dashboards for assessing the quality of the schedule. You can see how well the schedule covers your requirements, over staffing or under staffing levels, how much the schedule costs, and so on. If you are satisfied with the schedule, and there are no critical alerts, you can fix the activities and work hours of employees before proceeding to the next step. However, you may find that the scheduling requirements are not adequately covered, or the optimization process may have found scheduling problems.

Removing Scheduling Problems

The optimization process of OWS may find scheduling problems. The problems may be related to employment contracts, absences, or skill levels. As an example, you may not have enough employees in your store who have the necessary skills to meet the hour requirements for a certain activity. Or, the employees who have the required skills may not be available to work during the hours you need them.

By generating alerts, OWS supplies information you need to solve these problems. You can easily find employees to replace existing shifts or work days and make schedule adjustments where required.

Incorporating Changes to an Optimized Schedule

To improve schedule quality, resolve conflicts, or modify individual schedules, you may wish to make changes to an optimized schedule. These changes then need to be incorporated into the schedule. There are two ways to do this:

- You can apply the changes directly to an existing optimized schedule.

The schedule is not re-optimized. OWS checks the schedule. You must resolve any critical alerts that are generated. If you have a working schedule you use regularly, and you are simply making minor changes, this approach avoids completely reorganizing established individual schedules.

- You can re-optimize the schedule, If you make multiple or global changes:
  - Rescheduling -- OWS generates an optimized schedule, using any imported actual and posted data, and any fixed or locked schedule information. (This schedule contains the incorporated changes that comply with the global policies defined in the OWS Designer.)
  - Creating the schedule again -- OWS generates a new optimized schedule that does not use imported actual and posted data, but does use fixed and locked schedule information. (OWS does not consider the global policies defined in the OWS Designer when it generates a new schedule.)

Schedule Step Tabs

The Weekly Schedule step contains several tabs that facilitate scheduling:

- Weekly Schedule: View the daily schedule of each employee, and if necessary, modify the employee's schedule
- Daily Schedule: View the daily schedule of each employee, and if necessary, modify the employee's schedule
- Daily KPIs: View the daily key performance indicators
- Demand Analysis: View staffing requirements and activity workload

The Long Term Schedule step contains several tabs that facilitate scheduling:

- Long Term Schedule: View the weekly schedule of each employee, and if necessary, modify the employee's schedule. View the actual hours worked once they are imported into the schedule
- Weekly KPIs: View the weekly key performance indicators
- Demand Analysis: View staffing requirements
- Schedule Variance: View the variance between the employee's projected workload and actual workload

Proceeding to the Next Step

You can proceed to the next step when you have:

- Optionally scheduled and fixed the activities for employees or the whole team.
- Submitted the schedule for optimization.
- Removed any critical alerts.
- Incorporated any changes and re-optimized the schedule by rescheduling or creating the schedule again.

When your schedule is finalized, you can go to the final step: Post.

See:
Dashboards Overview
Weekly Schedule

STEP 5: POST

The Post step is the fifth step in the scheduling process. With the Post step, you display and print the schedule and finish the scheduling process.

Weekly Process Post Step

When you post the schedule, you complete the scheduling process for that week. You can then print the weekly or daily schedule in a PDF format, and view the schedule on the Posted Schedule page. The Post step also provides schedule performance indicators for each day of the week.

The Post step contains the following tabs:

- Post Schedule

  Use this tab to review the weekly performance indicators and to create a final optimized schedule. The optimized schedule appears on the Posted Schedule tab.

- Posted Schedule

  Use this tab to view the final optimized schedule. If staff changes occur that require changes to the schedule, such as absences, you can return to the Schedule page and make changes there without altering the posted schedule. The posted schedule preserves the schedule, so that it remains unchanged until you post a revised one.

  From the Post Schedule tab, you can view and print a PDF version of the weekly or daily schedule.

Long Process Post Step

You can post an initial schedule and a posted schedule. The initial schedule allows you to retain a version of the schedule that you can refer to apart from the posted schedule. The posted schedule is the final schedule that you can post or distribute to your employees.

If schedule changes occur, you can update the initial and posted schedule or update only the posted schedule. You might re-post the posted schedule and not the initial schedule, if you wanted to retain an original version of the schedule for future reference.

You can print a copy of this schedule if you administrator has created a report for it using Oracle BI Publisher or another application.

The Post step contains the following tabs:

- Post Schedule

  Use this tab to review the weekly performance indicators and to create an optimized initial posted schedule and a final posted schedule.

- Post Initial Schedule

Use this tab to view an initial posted schedule. This version preserves the schedule, so that it remains unchanged. As an example, you might keep the initial schedule and only replace it when a significant schedule revision occurs, such as a quarterly or mid-year schedule adjustment.

- Posted Schedule.

  Use this tab to view the final schedule. If staff changes occur that require changes to the schedule, such as absences, you can return to the Schedule page and make changes there without altering the posted schedule.

See:
Post Schedule
Posted Schedule
Initial Posted Schedule

Forecast

FORECAST SUMMARY

The Forecast Summary tab is part of Step 1: Forecast for the Weekly Process and the Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) From here, you can view, customize, and commit forecasts.

Forecasts are based on drivers. Use the Select Filter list to select the driver or set of drivers you want to display. The drivers you select with this filter determine what kind of data OWS displays in the Filter-Level Forecast Summary and Filter-Level Detail tables.

Store Budget

Budget is the global target for the store, in the displayed currency. It is not driver-dependent. It is established at the corporate level, and you cannot edit it.

Filter-level Forecast Summary

Forecast represents the forecast generated by the OWS, based on the drivers you selected. You cannot edit it. If you wish to check individual driver forecasts generated by the system, click the System Forecast tab.

Adjusted Forecast represents the total forecast for all the selected drivers. OWS updates it when you edit a driver forecast. You can compare the Adjusted Forecast with the Forecast generated by the OWS system.

Forecast Alerts

When you click the Update Forecast button at the bottom of the page, OWS checks your forecast and may generate alerts. The Forecast Alerts icon shows whether alerts have been generated and their highest severity level (alerts are never critical in the Forecast step). Click the Forecast link to view the alert Issues list (the Forecast link displays only if OWS generated an alert).

Filter-Level Detail

This table displays all selected drivers. It includes forecasted drivers, non forecasted drivers, and store property drivers. Either OWS calculates forecasts of forecasted drivers based on similar past weeks, or external store applications generate them and import them directly into OWS.

You can view the drivers in graph or grid form.

You can customize the forecasts based on your store-specific knowledge using the Grid tab. However, this only applies to the day or week for which you make the change. To edit cyclic non-forecasted drivers or store property drivers, go to the Non-Forecasted Drivers and Store Properties tab.

A blue triangle indicates an original forecast, and a red triangle means that you have modified the forecast.

Note: Since Budget is stated in dollars, you must select only those drivers that are stated in dollars to compare the corporate budget, the system forecast, and your customized forecast shown in Adjusted Forecast.

Zoom

If you have long term scheduling enabled, you can use the zoom icon to display the data within a specific period of time. Click  the zoom icon and then choose the filter you want to use for viewing the information displayed on the page, such as quarter, month, week.

See:
Demand Summary
Editing Driver Forecasts
Non-Forecasted Drivers
Step 1: Forecast
Viewing Driver Forecasts
Departmental Scheduling Process

Buttons	Description
Update Forecast	Updates the Forecast Summary if you saved changes in the Non-Forecasted Drivers tab, Store Property Drivers tab, or Store Event tab. Updates the forecasted drivers, Forecast and Adjusted Forecast totals if you made changes to the calculation terms (for instance, if you changed the type of week in Utilities that is used to generate the forecast).
Confirm and Proceed	Confirms your forecast and takes you to Step 2: Demand.

SYSTEM FORECAST

The System Forecast tab is part of Step 1: Forecast. System forecasts are calculated in one of two ways, by:

- OWS using statistical methods.
- An external applications and imported directly into OWS.

The data provided in this tab is for reference purposes and cannot be edited.

Forecasts are based on drivers. Use the Select Filter list to select the driver or set of drivers you want to display.

Filter-level Forecast Summary

Forecast represents the total system forecast for the selected driver for each day of the week (weekly process), or for each week of the year (long term process). OWS displays the same total in the Forecast Summary tab on the Forecast line.

Filter-level Detail

This table contains the system forecasts for individual drivers. You cannot edit system forecasts, but you can change the values in the Forecast Summary tab.

See: Viewing System Driver Forecasts

NON-FORECASTED DRIVERS

The Non-Forecasted Drivers tab is part of Step 1: Forecast. Non-forecasted drivers are drivers that the application cannot forecast because they are too unpredictable or store-specific.

OWS displays these drivers in the Forecast step and includes them during the Demand calculation, but does not calculate non-forecasted drivers. The non-forecasted drivers are often defined by the administrator during setup.

The administrator determines whether a driver will be dated or cyclic at the configuration of the application using OWS Designer. Cyclic driver forecasts are based on profiles. The weekly process displays daily non-forecasted drivers; the long term process displays weekly and daily non-forecasted drivers. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.)

Depending on your configuration, some weekly drivers also appear as long term process drivers, while other drivers are unique. The weekly drivers are often more detailed; for example, the non-forecasted drivers for your weekly process might include inventory and truck delivery, but the non-forecasted driver for your long term process might include storage which would encompass delivery, restocking, and inventory forecast costs.

Non-Forecasted Drivers

The non-forecasted driver page contains two tables, each displaying the non-forecasted drivers for a selected store department:

- Dated Non-Forecasted Drivers: Provides an overview of daily or weekly non-forecasted drivers. From this table you can edit the daily non-forecasted drivers (weekly process) or weekly drivers (long term process). You must manually enter daily non-forecasted drivers for each day they apply.
- Cyclic Non-Forecasted Drivers: Provides an overview of all recurring non-forecasted drivers. You cannot edit the values in this table. To edit the forecasts of cyclic non-forecasted drivers, use the Update Non-Forecasted Driver Profile page.

See:
Editing Non-Forecasted Drivers Forecasts
Viewing Non-Forecasted Drivers Forecasts

Update Cyclic Non-Forecasted Drivers

From this page you can update the forecasts of non-forecasted drivers that are recurring. Cyclic non-forecasted drivers are based on administrator-defined profiles. You can update:

- Daily cyclic drivers in a grid
- Weekly cyclic drivers using a wizard

You can also update cyclic non-forecasted drivers forecasts in the Forecast Summary tab, but the new values only apply to the day or week for which they were entered.

See:
Updating Non-Forecasted Driver Profiles
Viewing Non-Forecasted Driver Forecasts

STORE PROPERTY DRIVERS

The Store Property Drivers tab is part of Step 1: Forecast. Store property drivers are drivers that the application does not forecast because they involve physical aspects of the store. They are not greatly affected by business factors.

An example of a store property is the surface area of a store. More than any business factor, it is the surface area that affects how many hours it will take to clean the store. Another example is whether or not the store has a forklift for stocking, which impacts how long it takes to stock crates.

The administrator determines whether a driver will be weekly, daily, or cyclic during OWS setup. Cyclic driver forecasts are based on profiles.

A store property driver is either selected or de-selected for a given day (On/Off). The values used by these drivers are determined in the Properties tab of the Utilities window.

The Store Property Drivers tab contains two pages: Store Property Drivers and Update Store Property Drivers.

See: Properties

Store Property Drivers

This page contains two tables, each displaying the store property drivers for a selected store department:

- Dated Store Property Drivers: Shows the daily (weekly process) or weekly store property drivers (long term process). These drivers are not cyclic, and they must be selected and deselected manually for each day or week.
- Cyclic Store Property Drivers: Shows the cyclic store property drivers. You cannot edit the values in this table. To select and deselect cyclic store property drivers, use the Update Store Property Drivers page.

See:
Editing Store Property Drivers Forecasts
Viewing Store Property Drivers Forecasts

Update Store Property Drivers

From this page you can select/deselect cyclic store property drivers. Cyclic store property drivers are based on administrator-defined profiles. You can update:

- Daily cyclic drivers in a grid
- Weekly cyclic drivers using a wizard

You can also select/deselect cyclic store property drivers in the Forecast Summary tab, but any changes you make apply only to the day or week for which they were made.

See:
Updating Cyclic Store Property Driver Profiles
Viewing Store Property Driver Forecasts

STORE EVENT

The Store Event tab is part of Step 1: Forecast weekly process. A store event is a special event that has an impact on certain driver forecasts. Special promotions, clearance sales, and holidays are examples of store events.

This tab displays all the events assigned to the store and to all the organizations higher than the store into which you are logged. The tab also displays the daily impact of these store events.

Daily Impact

This table shows the impact of the store events you declared in the History table. Impacts are expressed as a percentage of an existing driver forecast. An impact of 5.00 on a given day and for a given driver means that the driver's forecast is increased by 5% for that day.

Impacts can be positive or negative. For instance, a back-to-school event would have a positive value, indicating increased business. However, if the store event is renovation work, the impact value would probably be negative.

If a single driver is affected by several store events on the same date, the impact value is the total of all the impact values.

Events List

From this table, you can assign store events from the Events list. You select the store events that apply to your store and date them. You can also delete unwanted store events.

Events History

From this table, you can view all the events assigned to organizations higher than the store into which you are logged.

See:
Declaring a Store Event
Deleting a Store Event
Editing the Impact of Store Events
Viewing the Impact of Store Events
Hierarchy Event
Define and Assign Global Events

HIERARCHY EVENT

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.

See:
Define and Assign Global Events

How Tos

Viewing Driver Forecasts

From the Forecast Summary tab, you can view driver forecasts for each day of the week selected.

To view driver forecasts:

1. Click the Forecast Summary tab:

   Weekly Process > Forecast step > Forecast Summary
   Long Term Process > Forecast step > Forecast Summary

2. In the application bar, click  to select a store.

3. Click  to select a driver filter.

   The selected driver forecasts display in a graph or a grid.

   - A blue triangle appears next to original forecasts. Original forecasts are system forecasts, non-forecasted driver forecasts, or pre-forecasted driver forecasts whose original values have not been modified.
   - A red triangle appears next to forecasts you have modified. You can check the original forecasts of forecasted drivers in the System Forecast tab.
   - The Filter-level Detail table displays the forecast total for the selected drivers. You can compare it with the system forecast total shown on the Forecast line of the Filter-level Forecast Summary table.

See:
Editing Driver Forecasts
Forecast Summary

Editing Driver Forecasts

From the Forecast Summary tab, you can edit the forecasts for each day of the selected week, or each week of the selected year, if you have long term scheduling enabled. When you edit a forecast in this tab, the change only applies to the day or week concerned. If you edit a forecast that is based on a cyclic profile, the cyclic values will not be modified: only the value for that specific day or week will change.

To edit driver forecasts:

1. Click the Forecast Summary tab:

   Weekly Process or Long Term Process > Forecast step > Forecast Summary
2. On the application bar, click  to select a store.
3. Click  to select a driver filter.
4. Click the Grid tab.

   The selected driver forecasts display in a grid.
5. To edit a driver forecast, click the cell in the table for the driver and the day or week information that you want to edit and enter the new value.

- A blue triangle appears next to original forecasts. Original forecasts are system forecasts, non-forecasted driver forecasts, or pre-forecasted driver forecasts whose original values have not been modified.
- A red triangle appears next to forecasts you have modified. You can check the original forecasts of forecasted drivers in the System Forecast tab.
- In the Filter-level Forecast Summary table, Adjusted Forecast is updated with the new forecasted total for that day. You can compare it with the system forecast shown on the Forecast line of the Filter-level Forecast Summary table.

You can change data several times before saving.

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

See:
Forecast Summary
Viewing Driver Forecasts

Viewing System Driver Forecasts

From the System Forecast tab, you can view individual system driver forecasts for each day of the selected week (weekly process), or each week of the year (long term process). These forecasts are either system-generated or imported.

To view system driver forecasts:

1. Click the System Forecast tab:

   Weekly Process or Long Term Process > Forecast step > System Forecast

2. On the application bar, click  to select a store.

3. Click  to select a driver filter

   The selected system driver forecasts display in a grid. In the Filter-level Forecast Summary table, the forecast total for the selected system drivers is shown in the Forecast line.

See:
Forecast Summary
System Forecast

Viewing Non-Forecasted Driver Forecasts

From the Non-Forecasted Drivers tab, you can view the forecasts of daily and cyclic non-forecasted drivers.

To view a non-forecasted driver forecast:

1. Click the Non-Forecasted Drivers tab:

   Weekly Process or Long Term Process > Forecast step > Non-Forecasted Drivers

2. On the application bar, click  to select a store to view the Dated Non-Forecasted Driver table and the Cyclic Non-Forecasted Drivers table.

See:
Editing Non-Forecasted Driver Forecasts
Forecast Summary
Non-Forecasted Drivers
Updating Cyclic Non-Forecasted Driver Profiles

Editing Non-Forecasted Driver Forecasts

There are two ways to edit non-forecasted driver forecasts that are not cyclic:

- Edit them directly in the Forecast Summary tab.
- Edit them using the Non-Forecasted Drivers tab.

This topic describes the second option.

Note: To edit non-forecasted driver forecasts that are based on cyclic profiles, see Updating Non-Forecasted Driver Profiles.

To edit a non-forecasted driver forecast:

1. Open the Non-Forecasted Drivers page:

   Weekly Process or Long Term Process > Forecast step > Non-Forecasted Drivers tab > Non-Forecasted Drivers page

2. On the application bar, click  to select a store.
3. Click a cell and enter a value.

   When you click another cell, the Total cell is updated. You can change the data several times before saving.

4. On the application bar, click  to save your changes.
5. Click the Forecast Summary tab.
6. Click Update Forecast to update the Forecast Summary tab.

   Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the non-forecasted driver forecasts and does not include them in the Demand step.

See:
Demand Summary
Editing Driver Forecasts
Forecast Summary
Non-Forecasted Drivers
Updating and Initializing Non-Forecasted Driver Profiles
Viewing Non-Forecasted Driver Forecasts

Updating Cyclic Non-Forecasted Driver Profiles

From the Non-Forecasted Driver Profile table, you can update the profiles of non-forecasted drivers for each day of the selected week, or for each week, if you have long term scheduling enabled. These non-forecasted driver forecasts are based on cyclic profiles.

To update a daily non-forecasted driver profile:

1. Open the Update Cyclic Non-Forecasted Drivers page:

   Weekly Process > Forecast step > Non-Forecasted Drivers tab > Update Cyclic Non-Forecasted Drivers
   Long Term Process > Forecast step > Non-Forecasted Drivers tab > Daily Non-Forecasted Drivers > Update Cyclic Non-Forecasted Driver
2. On the application bar, click  to select a store.
3. Click  to select a non-forecasted driver.
4. Select a cell in the Non-Forecasted Driver Profile table and enter a value.

   These cells represent the values OWS uses. The units you specify depend on the driver type. When you select another cell, the Total cell updates. Editing the value of a cyclic driver changes the value for that profile for each week the profile applies.
5. On the application bar, click  to save your changes.
6. Select the Forecast Summary tab.
7. Click Update Forecast to update the Forecast Summary tab.

   Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed OWS discards any changes you made to the non-forecasted driver profiles and does not include them in the Demand step.

To update a weekly non-forecasted driver profile:

1. Open the Update Cyclic Non-Forecasted Drivers page:

   Long Term Process > Forecast step > Non-Forecasted Drivers tab > Weekly Non-Forecasted Drivers > Update Cyclic Non-Forecasted Drivers
2. On the application bar, click  to select a store.
3. Click the link for Update Cyclic Non-Forecasted Drivers to update the rotation cycle using the wizard.
4. Click  to select a non-forecasted driver.
5. The Rotations page opens, listing all the rotations for the non-forecasted driver.
   - 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 check box for that row.
6. Click Next.
7. If you are changing the rotation information, the Rotation Description page opens. There is a row for each week in the current rotation.

- Using the list in the first row, edit the non-forecasted driver information for the first week in the rotation. Repeat this step for each week in the rotation. Click Next.
- If there are several rotations, the next rotation is displayed. Edit the rotation and click Next. Once you have finished editing all the rotations, the Rotation Assignment page appears.

8. If you are defining a new non-forecasted driver type rotation, click  and select a range from the dialog box.
   - 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
   - Click Finish to confirm your changes..
9. If you are erasing a rotation, the Rotation Assignment page displays. Click Finish to delete the rotation.

   Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the non-forecasted driver profiles and does not include them in the Demand step

See:
Demand Summary
Editing Non-Forecasted Driver Forecasts
Forecast Summary
Non-Forecasted Drivers
Viewing Non-Forecasted Driver Forecasts

Viewing Store Property Driver Forecasts

From the Store Property Drivers tab, you can view the forecasts of daily and cyclic store property drivers in the Dated Store Property Driver and Cyclic Store Property Driver tables. If you have long term scheduling enabled, you can also view the weekly store property driver information.

To view a store property driver forecast:

- Open the Store Property Drivers page:

  Weekly Process or Long Term Process > Forecast step > Store Property Drivers tab

- The daily store property drivers appear in the Dated Store Property Drivers table, and the cyclic store property drivers appear in the Cyclic Store Property Drivers table. If a cell is checked, the driver applies for that day or week; otherwise, it does not apply.

See:
Editing Store Property Driver Forecasts
Forecast Summary
Store Property Drivers
Updating Cyclic Store Property Driver Profiles

Updating Cyclic Store Property Driver Profiles

On the Update Store Property Drivers page, you can update the profiles of store property drivers for each day of the selected week. These store property driver forecasts are based on cyclic profiles.

To update a daily store property driver:

1. Open the Update Store Property Drivers page:

   Weekly Process > Forecast step > Store Property Drivers tab > Update Store Property Drivers
   Long Term Process > Forecast step > Store Property Drivers tab > Daily Store Property Drivers > Update Cyclic Store Property Drivers

2. Click  to select a store property driver.

   The cells in this table represent the store properties you are using within the Forecast and Demand calculation. In the configuration, you link a task to a store property (such as cleaning to square footage). In this example, if the check box for the store property driver is not checked, the value for the task is zero; if it is checked, the value is the square footage times the labor standard defined during configuration.

3. Double-click a cell to turn it Off/On.

   Cells with a check are On and apply for that day. Cells without a check do not apply. When you edit a cyclic driver value, you are changing the value for that profile for each week the profile applies.

4. On the application bar, click  to save your changes.
5. Select the Forecast Summary tab.
6. Click Update Forecast to update the Forecast Summary tab.

   Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed >>, OWS discards any changes you made to the store driver profiles and does not include them in the Demand step.

To update a long term process store property driver profile:

1. Open the Update Store Property Drivers page:

   Long Term Process > Forecast step > Store Property Drivers tab > Weekly Drivers> Update Cyclic Store Property Drivers

2. On the application bar, click  to select a store.
3. Click the link for Update Cyclic Store Property Drivers to update the rotation cycle using the wizard.
4. Click  to select a store property driver.
5. The Rotations page opens, listing all the rotations for the store property driver.

- 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 check box for that row.

6. Click Next.
7. If you are changing the rotation information, the Rotation Description page opens. There is a row for each week in the current rotation.
   - Using the list in the first row, edit the store property driver information for the first week in the rotation. Repeat this step for each week in the rotation. Click Next.
   - If there are several rotations, the next rotation is displayed. Edit the rotation and click Next.
   - Once you have finished editing all the rotations, the Rotation Assignment page appears.
8. If you are defining a new store property driver type rotation, click  and select a range from the dialog box.
   - 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
   - Click Finish to confirm your changes..
9. If you are erasing a rotation, the Rotation Assignment page displays. Click Finish to delete the rotation.

   Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the store driver profiles and does not include them in the Demand step

See:
Demand Summary
Editing Store Property Driver Forecasts
Forecast Summary
Store Property Drivers
Viewing Store Property Driver Forecasts

Editing Store Property Driver Forecasts

There are two ways to edit store property driver forecasts that are dated (not cyclic):

- Edit them directly in the Forecast Summary tab.
- Edit them using the Store Property Drivers tab.

This topic describes the second option.

Note: To edit store property driver forecasts that are based on cyclic profiles, see Updating Cyclic Store Property Driver Profiles.

To edit a store property driver:

1. Open the Store Property Drivers page:

   Weekly Process or Long Term Process > Forecast step > Store Property Drivers tab
2. Double-click a cell in the Dated Store Property Drivers table to turn it Off/On.

   Cells with a check are On and apply for that day. Cells without a check do not apply.
3. On the application bar, click  to save your changes.
4. Select the Forecast Summary tab.
5. Click Update Forecast to update the Forecast Summary tab.

Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the store property driver forecasts and does not include them in the Demand step.

See:
Forecast Summary
Store Property Drivers
Updating Cyclic Store Property Driver Profiles
Viewing Store Property Driver Forecasts

Declaring a Store Event

You can define a complete list of store events using the Events Module. From the Store Event tab, you can select which store events apply to your store and date each store event. Several store events may overlap. All the stores below this node inherit this event.

To declare a store event:

1. Click the Store Event tab:

   Weekly Process > Forecast step > Store Event

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

2. In the Events history table, click  .

   The Create a Range window opens.

3. Enter the start and end dates.

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

4. Click OK to close the dialog box.

   A new line is added to the History table.

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

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

7. On the application bar, click  to refresh the Daily Impact table with your changes.

8. Repeat these steps to create other events.

9. Select the Forecast Summary tab.

10. Click Update Forecast to update the Forecast Summary tab.

Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the store events and does not include them in the Demand step.

See:
Deleting a Store Event
Demand Summary
Editing the Impact of Store Events
Forecast Summary
Store Event
Viewing the Impact of Store Events
Define and Assign Global Events

Viewing the Impact of Store Events

From the Store Event tab, you can view the impact of store events on the driver forecasts for each day of the week selected.

To view the impact of store events:

1. Click the Store Event tab:

   Weekly Process > Forecast step > Store Event

   The Daily Impact table displays the impact of the declared store events on driver forecasts, for each day of the selected week. The impact is a percent increase or decrease of the forecast values of each affected driver.

   If a driver is impacted by several store events on the same date, the value appearing is a sum of the percentages.

   - A blue triangle indicates a default value.
   - A red triangle shows that you have modified the impact.

See:
Declaring a Store Event
Deleting a Store Event
Editing the Impact of Store Events
Forecast Summary
Store Event

Editing the Impact of Store Events

When you declare a store event, OWS automatically calculates the impact on the forecasts of affected drivers. This impact is defined by the administrator at OWS setup. However, you can modify the impact values manually for each day and each affected driver.

You can view these events through the Store Events tab in the Forecast step.

An impact is expressed as the percentage a driver forecast is increased or decreased on a given day as a result of a store event. If the same driver is affected by several store events on the same date, the value is the total of all the impact values. As an example, if the clearance sales event has an impact of 30% on the sales, and the advertisement campaign has one of 15%, and both are scheduled the same day by the store manager, then the final impact is 45%.

To edit the impact of a store event:

1. Click the Store Event tab:

   Weekly Process > Forecast step > Store Event
2. Select a cell (for a driver and a date), and enter a value.
   - A blue triangle indicates a default value.
   - A red triangle shows that the impact has been modified.

   You can change the data and validate several times.
3. On the application bar, click  to save your changes.
4. Select the Forecast Summary tab.
5. Click Update Forecast to update the Forecast Summary tab

Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the store events and does not include them in the Demand step.

See:
Declaring a Store Event
Deleting a Store Event
Demand Summary
Forecast Summary
Store Event
Viewing the Impact of Store Events

Deleting a Store Event

You can delete unwanted store events. The store event remains available in the list if you wish to assign it at a later time.

To delete a store event:

1. Display the Store Event tab:

   Weekly Process > Forecast step > Store Event tab

2. In the History table, click  on the line of the event you want to delete.
3. On the application bar, click  to save your changes.

   If the deleted event was on the displayed week, the Daily Event Impact table updates your values

4. Repeat these steps to delete other events.
5. Click Update Forecast to update the Forecast Summary tab.

Note: If you do not update the Forecast Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the store events and does not include them in the Demand step.

See:
Declaring a Store Event
Demand Summary
Editing the Impact of Store Events
Forecast Summary
Store Event
Viewing the Impact of Store Events
Define and Assign Global Events
Hierarchy Event

Demand

DEMAND SUMMARY

The Demand Summary tab is part of Step 2: Demand for the Weekly and Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.)

Weekly Process

Your daily forecasts for a given week are first translated into hourly requirements for each activity. OWS calculates these requirements by applying a specific labor standard to each forecast, translating them into a number of hours for one or more activities. The functional administrator defines these labor standards during the configuration of the application using OWS Designer.

The data in this tab provides an overview of your hour requirements, and you cannot edit it. If you need to schedule specific hours, use the Fixed Hours and Special Fixed Activities tabs.

Hour requirements are based on activities. Using the Select Filter list, you can select an activity or set of activities you want to view. The hours in Filter-Level Demand Summary and Filter-Level Detail tables are tied to the activities you select with this filter.

Long Term Process

Your weekly forecasts for a given year are first translated into daily or weekly requirements and then displayed as weekly totals in demand hours or cost for one or more activities. Depending on the configuration, some activities may be common to both the weekly and long term process and others unique to the long term process.

The data in this tab provides an overview of your weekly requirements, and you cannot edit it. If you need to schedule specific hours, use the Fixed Hours tab.

Zoom

You can use the zoom icon to display the data within a specific period of time. Click  the zoom icon and then choose the filter you want to use for viewing the information displayed on the page, such as quarter, month, week.

Store Budget

The store budget displays the global target for the store in hours. The demand budget is imported or defined at setup and is based on:

- Hours, set at the corporate level. This hourly budget is not activity-dependent.
- Labor costs, set at the corporate level, or as a percentage of a driver, such as a percentage of the forecasted sales which the application then uses as a basis for the workload cost for the business unit.

The application adjusts the activity costs (calculated using the hourly cost of an activity) to meet the labor costs.

Filter-Level Demand Summary

The Demand Hours line represents the sum of all the hours of the activities selected.

Filter-Level Detail

Shows the hours required for each individual activity you selected. You can view the hour requirements in graph or grid form. If you make changes in the Fixed Hours or Special Fixed Activities tabs, clicking Update Demand updates the Demand Summary tab with the new values.

Demand Cost

If you have long term scheduling enabled, on the Demand Cost page you can view the demand information presented in the summary page translated into labor costs (total cost for an activity is the number of hours times the cost for the activity).

Demand Alerts

Clicking Update Demand at the bottom of the Demand Summary or Demand Cost page may generate some alerts. The Demand Alerts icon shows whether any alerts have been generated and their highest severity level (alerts are never critical in the Demand step). Click the Demand link to view the alert Issues list (the Demand link displays only if the application generated an alert).

See:
Step 2: Demand
Viewing Hour Requirements
Departmental Scheduling Process

Buttons	Description
Update Demand	Updates the number of employee hours if you added Fixed Hours or Special Fixed Activities. During setup, your administrator may have enabled compression and expansion options. If implemented, clicking Update Demand recalculates the hours so that the total for each week fits into the assigned budget. For example, if the total number of hours in a Demand Hours cell exceeds the Budget for a given day, clicking Update Demand recalculates the hours so that each daily total for the week fits into the assigned budget. If the total hours falls below the budget, the application recalculates the hours to fit the assigned budget.
Confirm and Proceed	Confirms your employee hour requirements and takes you to Step 3: Check.

See:
Making Exceptional Changes to Fixed Hours
Scheduling Special Fixed Activities

FIXED HOURS

The Fixed Hours tab is part of Step 2: Demand. By using fixed hours, you can schedule 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. As an example, you may need two people from 6 A.M. to 8 A.M. in the morning to unload deliveries before the store opens.

Fixed hours are based on cyclic profiles. Once defined, they recur regularly until they expire.

Fixed Hours

This page displays the activities defined by a business consultant as fixed hours (at OWS setup using OWS Designer). You select the fixed hours activity you want to display. OWS shows the time period and number of people or hours for each day of the week, or if you have long term scheduling enabled, for each week of the year. You can also use this page to make weekly or daily changes to the hours generated by the Fixed Hours profiles. You can change both the number of people or hours, and the time period.

See:
Deleting Exceptional Changes to Fixed Hours
Making Exceptional Changes to Fixed Hours
Viewing Fixed Hours
Viewing Hour Requirements

Update Fixed Hours

From this page, you can edit the cyclic values of fixed hours. Fixed hours are based on fixed hour profiles.

There are three types of fixed hour profiles:

- Time Window Value Profiles

  Prompts you to select a week type, time period, and value for the activity. An activity may be linked to several week types, which appear in the list. The value represents either a number of persons or a number of hours (determined by the functional administrator).

- Value Only Profiles

  Prompts you to define a value for the activity. An activity may be linked to several week types. If so, they appear on separate lines in the Fixed Hours Profile table. The value represents either a number of persons or a number of hours (determined by the functional administrator).

- Weekly Profiles

  Prompts you to define the values using a wizard.

The functional administrator determines the type of profile to be assigned to the activity at OWS setup. When you select an activity, the assigned profile type displays. A profile cycle can be one or more weeks. When you edit a Fixed Hours profile, the Fixed Hours page updates with the new values.

See:
Updating Fixed Hour Profiles

SPECIAL FIXED ACTIVITIES

The Special Fixed Activities tab is part of Step 2: Demand. Special Fixed Activities (SFAs) are activities that require a specific person at a specific time. You can use these, for example, to schedule meetings or training sessions for employees. SFAs are not cyclic. They only apply to the day on which they are scheduled.

You can limit, or cap, the total amount of time that all employees are assigned to a given SFA. You can set a cap for a day, a week, or both.

There are two types of caps:

- Dated: You define these caps on a daily basis.
- Cyclic: You define these caps according to a recurring schedule. The maximum of hours of training can be cyclic even if trainings are assigned to individuals manually.

Depending on the SFA, the administrator determines whether a cap is daily or cyclic at OWS setup. The administrator can also set certain cyclic caps to default values that you can modify.

If the time you schedule exceeds a cap, OWS displays an alert in the Demand step. This alert is for information purposes: The values exceeding the cap are left as they are, and you can proceed to the next step.

The Special Fixed Activities tab contains three pages: Special Fixed Activities, SFA Cap, and Update Default SFA Cap.

Note: Special Fixed Activities are scheduled using the weekly process, not the long term process which does not include a tab for Special Fixed Activities.

Special Fixed Activities

This page contains two tables:

- Special Fixed Activities

  This table displays the list of employees in the selected team or the selected employee. From this table, you can schedule your SFAs. Click  to choose the table display options and click  to filter the data.

- Special Fixed Activities Summary

  This table displays a daily and weekly overview of SFAs. It is for viewing purposes only, and you cannot edit its content. OWS updates this table automatically when you make changes to the Special Fixed Activities table.

See:
Employee Maintenance Overview
Scheduling Special Fixed Activities
Viewing Scheduled Special Fixed Activities

SFA Cap

This page contains two tables:

- Daily Cap

  From this table, you can define or edit the daily caps of an SFA.

- Weekly Cap

  From this table, you can define or edit the weekly caps of an SFA.

Edits made in this page only affect the day on which they are made. The cyclic values from the Update Default SFA Cap page appear in these tables (see below) but you can override these values for a given day.

See:
Editing Daily Activity Caps
Editing Weekly Activity Caps
Viewing Activity Caps

Update SFA Cap

From this page you can view and update cyclic caps. These caps appear in the SFA Cap page, where you can make day-specific changes. Some SFAs may have default values that were set by the administrator. You can change these values in this table.

See: Updating Activity Cap Cycles

CORE COVERAGE

The Core Coverage tab is part of Step 2: Demand. From this tab, you schedule your core activities. A core activity is a responsibility or task that may be invoked without notice or planning, such as first-aid assistant or Emergency Response Team. 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.

There are two types of core activities:

- Dated: You define these activities on a daily basis.
- Cyclic: You define these activities according to a recurring schedule.

The administrator defines the times allotted to a core activity at OWS setup, and you cannot change them. However, you can define or edit the number of people assigned to each core activity. The value you provide represents the minimum staffing level required for a core activity. If this minimum number is not reached, OWS issues an alert in the Schedule step.

Certain regular activities may not be compatible with certain core activities. As an example, a service station activity may not be compatible with first-aid service since the employee is physically located outside the store. The administrator defines incompatibilities between certain regular activities and core activities during the system set up process.

The Core Coverage tab contains two pages: Core Coverage and Update Core Coverage.

Note: Core Coverage activities are scheduled using the weekly process, not the long term process which does not include a tab for Core Coverage.

Core Coverage

This page displays the core activities. You select the core activity to be displayed. The time period and number of people is shown for each day of the week. You can also use this page to make exceptional daily changes to Core Coverage values. You can change both the number of people and the time period.

See:
Deleting Exceptional Changes to Core Activities
Making Exceptional Changes to Core Activities
Viewing Core Activities

Update Core Coverage

From this page, you can edit the number of people assigned to a core activity. The OWS functional administrator defines whether a core activity is dated or cyclic. A profile cycle can be one or more weeks. When you edit a core activity profile, OWS updates this page with the new values.

See:
Changing the Number of People Assigned to a Core Activity

DEMAND SYNTHESIS

The Demand Synthesis tab is part of Step 2: Demand. This tab provides a graphical view of the workload of an activity for each day of the selected week, or each week of the year, if you have long term processing enabled. You can select an activity and monitor its workload graphically, instead of viewing it as a value in the Filter-level Detail grid. Alternatively, you can view the consolidated workload values for all activities of a store or department.

For the weekly process, the Demand Synthesis tab displays two demand graphs for each day of the selected week.

- Main graph displays the number of employees required for the activity. You can slide the cursor over the graphs to view more information. You can view the number of employees required for the activity, for each quarter hour of the day. The vertical axis of the graph represents the number of employees, and the horizontal axis represents time in hours.
- Total Daily graph displays the number of hours required to complete the activity.

For the long term process, the graph displays the number of employees required for the activity for the week. The vertical axis of the graph represents the number of employees, and the horizontal axis represents time in weeks.

A zoom icon  allows you to display the time period you want to view.

The Demand Synthesis tab contains two pages: View by Activity and View by Business Organization.

View by Activity

From this page, you can view the number of hours required for a chosen activity for each day of the selected week, or each week of the year.

View by Business Organization

From this page, you can view the hour totals for all the activities of a store or a department for each day of the selected week, or each week of the year.

See:
Demand Summary
Viewing Hour Requirements of Activities Graphically
Viewing Total Activity Workload of an Organization

How Tos

Viewing Hour Requirements of an Activity

The Demand Summary tab provides an overview of the hour requirements per activity for each day of the selected week (weekly process), or each week of the year (long term process). OWS calculates these hour requirements based on your forecasts.

To view the hour requirements:

1. Click the Demand Summary tab:

   Weekly Process or Long Term Process > Demand step > Demand Summary tab

2. On the application bar, click  to select a store or department.

3. Click  to select an activity filter.

   The hour requirements for the selected activities display in a graph or a grid. In the Filter-level Demand Summary table, the Demand Hours line displays the hour totals for the selected activities.

See:
Deleting Exceptional Changes to Fixed Hours
Fixed Hours
Making Exceptional Changes to Fixed Hours
Updating and Initializing Fixed Hour Profiles
Viewing Fixed Hours

Viewing Hour Requirements of Activities Graphically

From the Demand Synthesis tab, you can view the consolidated hours for all the activities of a store, graphically, for each day of the selected week, or if you have long term scheduling enabled, for each week of the year. You can also view the number of employees required for the activity.

To view the hour requirements of all the activities collectively, for a business organization in the weekly process:

- Open the View by Activity page:

  Weekly Process > Demand step > Demand Synthesis

- The Total Daily graphs display the hour totals for all the activities of the store for each day of the week. The graphs at the center display the number of employees required for all the activities in quarter hour intervals for a day.

To view the hour requirements of all the activities collectively, for a business organization in the long term process:

- Open the View by Activity page:

  Long Term Process > Demand step > Demand Synthesis

- The graph at the center displays the number of employee hours required for all the activities in the organization in weekly intervals during the year.

See:
Demand Synthesis
Viewing Total Activity Workload for an Organization

Viewing Total Activity Workload of an Organization

From the Demand Synthesis tab, you can view the consolidated hours for all the activities of a store, graphically, for each day of the selected week, or if you have long term scheduling enabled, for each week of the year. You can also view the number of employees required for the activity.

To view the hour requirements of all the activities collectively, for a business organization in the weekly process:

- Open the View by Business Organization page:

  Weekly Process > Demand step > Demand Synthesis

- The Total Daily graphs display the hour totals for all the activities of the organization for each day of the week. The graphs at the center display the number of employees required for all the activities in quarter hour intervals for a day.

To view the hour requirements of all the activities collectively, for a business organization in the long term process:

- Open the View by Business Organization page:

  Long Term Process > Demand step > Demand Synthesis

- The graph at the center displays the number of employee hours required for all the activities in the organization in weekly intervals during the year.

See:
Demand Synthesis
Viewing the Hour Requirement of Activities Graphically

Viewing Fixed Hours

From the Fixed Hours page, you can view the fixed hours you scheduled through either the Fixed Hours page or the Update Fixed Hours Profile page. Use fixed hours to schedule activities that must be performed within a given time range and that require either a specific number of hours or a specific number of persons.

To view fixed hours:

1. Open the Fixed Hours page:

   Weekly Process > Demand step > Fixed Hours tab
   Long Term Process > Demand step > Fixed Hours tab > Daily Fixed Hours or Weekly Fixed Hours

2. Click  to select a Fixed Hours activity.

   The activity is displayed, with the time period and number of people or hours shown for each day of the week or week of the year.

   - A blue triangle indicates a default value.
   - A red triangle shows that the fixed hours have been modified.

See:
Deleting Exceptional Changes to Fixed Hours
Fixed Hours
Making Exceptional Changes to Fixed Hours
Updating Fixed Hour Profiles
Viewing Hour Requirements

Making Exceptional Changes to Fixed Hours

On the Fixed Hours page, you can make changes to the fixed hours. These changes override the default values generated by the cyclic profiles, but these changes are not cyclic. They only affect the day on which you make them.

There are several types of fixed hour tables:

- Values-only table where you change the information directly in the table
- Time-window table where you change the values in a dialog box, such as number of hours and the time period for the fixed hours.
- Wizard where you change values following a series of steps

You can update:

- Daily fixed hours in a grid
- Weekly fixed hours using a wizard

To make an exceptional change to daily fixed hours:

1. Open the Fixed Hours page:

   Weekly Process > Demand step > Fixed Hours tab > Fixed Hours page (default)
   Long Term Process > Demand step > Fixed Hours tab > Daily Fixed Hours

2. Click  to select a Fixed Hours activity.

   The activity displays with the time period and number of people or hours shown for each day of the week.

3. In a Fixed Hours table, where you can change the values only in the cells of the table.
   - Click the cell and enter a new value
4. In a Fixed Hours table, where you can change the values in a dialog box:
   - Double-click the cell of the day for which you want to add fixed hours. OWS opens a dialog box where you can add or edit the information.
   - Modify the time range for each day by clicking the times in the Start and End cells and entering values directly, or by using the scroll arrows to the right of the cells. Minute values that are not multiples of 15 are automatically adjusted to the next quarter hour.
   - If the end time of the time period falls into the next calendar day, click Next Day.
5. Click Update to have your changes take effect, and OK to accept the changes and close the dialog box
6. On the application bar, click  to save your changes.
7. Select the Demand Summary tab.

8. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed >>, OWS discards any changes you made to the fixed hours and does not include them in the Check and Schedule steps.

To make an exceptional change to weekly fixed hours:

1. Open the Fixed Hours page:

   Long Term Process > Demand step > Fixed Hours tab > Weekly Fixed Hours

2. Click  to select a Fixed Hours activity.

   The activity displays with the time period and number of people or hours shown for each day of the week

3. Click  to select a fixed hours task.
4. Click the link for Update Fixed Hours to update the rotation cycle using the wizard.
5. The Rotations page opens, listing all the rotations for the fixed hours.
   - 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 check box for that row.
6. Click Next.
7. If you are changing the rotation information, the Rotation Description page opens. There is a row for each week in the current rotation.
   - Using the list in the first row, edit the fixed hours information for the first week in the rotation. Repeat this step for each week in the rotation. Click Next.
   - If there are several rotations, the next rotation is displayed. Edit the rotation and click Next.
   - Once you have finished editing all the rotations, the Rotation Assignment page appears.
8. If you are defining a new fixed hours rotation, click  and select a range from the dialog box.
   - 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.
   - Click Finish to confirm your changes.
9. Select the Demand Summary tab
10. Click Update Demand to update the Demand Summary tab.

    Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed , OWS discards any changes you made to the fixed hours and does not include them in the Check and Schedule steps.

See:
Deleting Exceptional Changes to Fixed Hours
Fixed Hours

Deleting Exceptional Changes to Fixed Hours

From the Fixed Hours page, you can delete the exceptional changes you made to fixed hours.

To delete an exceptional change to daily fixed hours:

1. Open the Fixed Hours page:

   Weekly Process > Demand step > Fixed Hours tab > Fixed Hours page (default)
   Long Term Process > Demand step > Fixed Hours tab > Daily Fixed Hours

2. Click  to select a Fixed Hours activity.

   The activity displays with the time period and number of people or hours shown for each day of the week.

3. In the Fixed Hours table, double-click the cell of the exceptional change that you want to delete. OWS opens a dialog box where you can edit and delete the information.

4. In the dialog box, click  and OK to accept the changes and close the dialog box.

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

6. Select the Demand Summary tab.

7. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the fixed hours and does not include them in the Check and Schedule steps.

To restore a deleted change to daily fixed hours:

1. Open the Fixed Hours page:

   Weekly Process > Demand step > Fixed Hours tab > Fixed Hours page (default)
   Long Term Process > Demand step > Fixed Hours tab > Daily Fixed Hours

2. Click  to select a Fixed Hours activity.

   The activity displays with the time period and number of people or hours shown for each day of the week.

3. In the Fixed Hours table, double-click the cell of the day for which you want to restore the fixed hours. OWS opens a dialog box where you can edit and restore the information.

4. In the dialog box, click Add, and enter the appropriate start and end times and value, and OK to accept the changes and close the dialog box.

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

6. Select the Demand Summary tab.
7. Click Update Demand to update the Demand Summary tab.

To delete weekly fixed hours using the wizard:

1. Open the Fixed Hours page:

   Long Term Process > Demand step > Fixed Hours tab > Weekly Fixed Hours
2. Click  to select a Fixed Hours activity.

   The activity displays with the time period and number of people or hours shown for each day of the week.
3. Click  to select a fixed hours task.
4. Click the link for Update Fixed Hours to update the rotation cycle using the wizard.
5. The Rotations page opens, listing all the rotations for the fixed hours.
   - To erase a rotation, click To Delete check box for that row.
6. Click Next.
7. Click Finish to confirm your changes.
8. Select the Demand Summary tab.
9. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed >>, OWS discards any changes you made to the fixed hours and does not include them in the Check and Schedule steps.

See:
Fixed Hours
Making Exceptional Changes to Fixed Hours
Pre-Scheduling Check
Updating Fixed Hour Profiles
Viewing Fixed Hours
Viewing Hour Requirements

Viewing Scheduled Special Fixed Activities

The Special Fixed Activities tab displays an overview of all scheduled Special Fixed Activities (SFAs). Use SFAs to schedule hours for activities that require a specific person at a specific time.

To view all scheduled special fixed activities:

- Open the Special Fixed Activities page:
  Weekly Process > Demand step > Special Fixed Activities tab
- The Special Fixed Activities Summary table displays a daily and weekly summary of the SFAs you scheduled in the Special Fixed Activities table.

Note: Special Fixed Activities are scheduled using the weekly process, not the long term process which does not include a tab for Special Fixed Activities.

See:
Editing Daily Activity Caps
Editing Weekly Activity Caps
Scheduling Special Fixed Activities
Special Fixed Activities (SFAs)
Updating Activity Cap Cycles
Viewing Activity Caps

Updating Fixed Hour Profiles

You can update the fixed hours profile for daily and weekly fixed hours. Depending on the type of fixed hours, you update the fixed hours profiles using:

- A table that lists the week types and the hours for each week type
- A wizard that displays the rotation cycle of the fixed hours

To update a fixed hours profile:

1. Open the Update Fixed Hours Profile page:

   Weekly Process > Demand step > Fixed Hours tab > Update Fixed Hours Profile page
   Long Term Process > Demand step > Fixed Hours tab > Daily Fixed Hours > Update Fixed Hours Profile page

2. Click  to select an activity with a fixed hour profile.

   The type of profile linked to that activity appears.

3. Click the Update the Fixed Hours link.
   - The list of week types is displayed in a table.
   - Click to select the cells where you want to change the values

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

   This updates the Fixed Hours table in the Fixed Hours page.

5. Select the Demand Summary tab.
6. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed >>, OWS discards any changes you made to the fixed hour profiles and does not include them in the Check and Schedule steps.

To update a fixed hours rotation profile:

1. Open the Update Fixed Hours Profile page:

   Long Term Process > Demand step > Fixed Hours tab > Weekly Fixed Hours > Update Fixed Hours Profile page

2. Click  to select an activity with a fixed hour profile.

   The type of profile linked to that activity appears.

3. Click Update the Fixed Hours link.
4. The Rotations page opens, listing all the rotations for the fixed hours.

- 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 check box for that row.

5. Click Next.
6. If you are changing the rotation information, the Rotation Description page opens. There is a row for each week in the current rotation.
   - Using the list in the first row, edit the information for the first week in the rotation. Repeat this step for each week in the rotation. Click Next
   - If there are several rotations, the next rotation is displayed. Edit the rotation and click Next.
   - Once you have finished editing all the rotations, the Rotation Assignment page appears.
7. If you are defining a new rotation, click  and select a range from the dialog box.
   - 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.
   - Click Finish to confirm your changes.
8. If you are erasing a rotation, the Rotation Assignment page displays. Click Finish to delete the rotation.
9. On the application bar, click  to save your changes.

   This updates the Fixed Hours table in the Fixed Hours page.
10. Select the Demand Summary tab.
11. Click Update Demand to update the Demand Summary tab.

    Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the fixed hour profiles and does not include them in the Check and Schedule steps.

See:
Deleting Exceptional Changes to Fixed Hours
Fixed Hours
Making Exceptional Changes to Fixed Hours
Pre-Scheduling Check
Viewing Fixed Hours
Viewing Hour Requirements

Scheduling Special Fixed Activities

The Special Fixed Activities tab allows you to schedule specific activities for specific employees. Scheduling is not cyclic and only applies to the day selected.

To schedule a special fixed activity:

1. Open the Special Fixed Activities table:

   Weekly Process > Demand step > Special Fixed Activities tab

2. On the application bar, click  to select a team or an employee.
3. Double-click the cell for the date and employee you want to schedule.

   The Oracle Workforce Scheduling -Web Page Dialog box opens.

4. Select an activity in the Details pane.
5. Specify the Start of shift and End of shift times for the activity, and click Add.

   The activity appears in the top pane. You can schedule several activities for the same day. The total work time appears on the Work Day line. If two or more shifts overlap, the last scheduled shift overwrites any existing overlapping hours.

6. To change the time of an existing activity:

   - Select the activity in the top pane.
   - Change the time in the Detail pane.
   - Click Update.

- To delete an activity, select the activity in the top pane and click  .
- Click OK to confirm.

  The special fixed activity appears in the table. The Special Fixed Activities Summary is updated.

- On the application bar, click  to save your changes.
- Select the Demand Summary tab.
- Click Update Demand to update the Demand Summary tab.

  Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed >>, OWS discards any changes you made to the special fixed activities and does not include them in the Check and Schedule steps

See:
Editing Daily Activity Caps
Editing Weekly Activity Caps
Employee Maintenance Overview
Pre-Scheduling Check
Special Fixed Activities (SFAs)
Updating Activity Cap Cycles

Viewing Activity Caps

You can view all the activity caps for an SFA for a selected week.

To view all the activity caps for an SFA:

1. Display the Daily Cap table:

   Weekly Process > Demand step > Special Fixed Activities tab > SFA Cap page

2. Click  to select an activity.

   Separate tables display the daily activity caps and weekly activity caps. A blue triangle indicates a cyclic cap whose administrator-defined value has not been modified. A red triangle indicates a cyclic cap whose administrator-defined value has been modified.

See:
Editing Daily Activity Caps
Editing Weekly Activity Caps
Scheduling Special Fixed Activities
Special Fixed Activities (SFAs)
Updating Activity Cap Cycles
Viewing Scheduled Special Fixed Activities

Editing Daily Activity Caps

You can cap the total amount of time that all employees combined can be scheduled for an SFA on a given day.

To edit a daily activity cap:

1. Display the Daily Activity Cap table:

   Weekly Process > Demand step > Special Fixed Activities tab > SFA Cap page

2. In the SFA Cap page, click  to select an activity.

   The Daily Activity Cap table displays the daily activity caps for the selected activity. A blue triangle indicates a cyclic cap whose administrator-defined value has not been modified. A red triangle indicates a cyclic cap whose administrator-defined value has been modified.

3. In the Daily Activity Cap table, click a day cell and enter a value.

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

   Note: If the number of hours scheduled exceeds the cap, an alert displays in the Demand step. This alert is for information purposes, and the values exceeding the cap are left as they are

5. Select the Demand Summary tab.

6. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed , OWS discards any changes you made to the special fixed activities caps and does not include them in the Check and Schedule steps.

See:
Editing Weekly Activity Caps
Pre-Scheduling Check
Scheduling Special Fixed Activities
Special Fixed Activities (SFAs)
Updating Activity Cap Cycles
Viewing Activity Caps
Viewing Scheduled Special Fixed Activities

Editing Weekly Activity Caps

You can cap the total amount of time that all employees combined can be scheduled for an SFA for a given week.

To edit a weekly activity cap:

1. Display the Weekly Activity Cap table:

   Weekly Process > Demand step > Special Fixed Activities tab > SFA Cap page

2. In the SFA Cap page, click  to select an activity.

   The Weekly Activity Cap table displays the weekly activity caps for the selected activity. A blue triangle indicates a cyclic cap whose administrator-defined value has not been modified. A red triangle indicates a cyclic cap whose administrator-defined value has been modified.

3. In the Weekly Activity Cap table, click a day cell and enter a value

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

   Note: if the number of hours scheduled exceeds the cap, an alert is displayed in the Demand step. This alert is for information purposes: the values exceeding the cap are left as they are.

5. Select the Demand Summary tab

6. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the special fixed activities caps and does not include them in the Check and Schedule steps.

See:
Editing Daily Activity Caps
Pre-Scheduling Check
Scheduling Special Fixed Activities
Special Fixed Activities (SFAs)
Updating Activity Cap Cycles
Viewing Activity Caps
Viewing Scheduled Special Fixed Activities

Updating Activity Cap Cycles

You can update the caps of special fixed activities that are defined based on cycles. These can be administrator-defined defaults or individual caps defined by a store manager.

These cycles apply to every week of the year.

To update an activity cap cycle:

1. Open the Update SFA Cap page

   Weekly Process > Demand step > Special Fixed Activities tab > Update SFA Cap page
2. Click  to select an activity.
3. Select a cell and enter a value.

   Any value you edit in the SFA Cap page overrides the value contained in the activity cap cycle, regardless of whether you changed the value before or after you updated the cycle.
4. On the application bar, click  to save your changes.
5. Select the Demand Summary tab.
6. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the special fixed activities caps and does not include them in the Check and Schedule steps

See:
Editing Daily Activity Caps
Editing Weekly Activity Caps
Pre-Scheduling Check
Scheduling Special Fixed Activities
Special Fixed Activities (SFAs)
Viewing Activity Caps
Viewing Scheduled Special Fixed Activities

Viewing Core Coverage

From the Core Coverage page, you can view each core activity and the number of people assigned to it. This number can be assigned at setup by your administrator or defined by a store manager in the Update Core Coverage page.

To view core coverage:

1. Open the Core Coverage page:

   Weekly Process > Demand step > Core Coverage tab > Core Coverage page (default)

2. Click  to select a core activity.

   The core activity is displayed, with the time period and number of people for each day of the selected week.

See:
Changing and Initializing Core Activity Profiles
Core Coverage
Deleting Exceptional Changes to Core Activities
Making Exceptional Changes to Core Activities
Pre-Scheduling Check

Making Exceptional Changes to Core Activities

From the Core Coverage page, you can make changes to core activities, and these changes will override any existing daily and cyclic values. Any changes you make in the Core Coverage page are not cyclic. They only affect the day on which you made them.

You can change both the number of people and the time period.

To make an exceptional change to a core activity:

1. Open the Core Coverage page:

   Weekly Process > Demand step > Core Coverage tab > Core Coverage page (default)

2. Click  to select a core activity.

   The core activity is displayed, with the time period and number of people shown for each day of the selected week.

3. Double-click the appropriate cell in the Core Coverage table.

   The Oracle Workforce Scheduling -Web Page Dialog box displays.

4. You can change both the time period and the value for a given day in the Detail pane of the dialog box.
5. Click Update and then OK.
6. You can see the modified values in the Core Coverage table.
7. On the application bar, click  to save your changes.
8. Select the Demand Summary tab.
9. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the special fixed activities caps and does not include them in the Check and Schedule steps

See:
Changing and Initializing Core Activity Profiles
Core Coverage
Deleting Exceptional Changes to Core Activities
Pre-Scheduling Check
Viewing Core Coverage

Deleting Exceptional Changes to Core Activities

From the Core Coverage page, you can make exceptional changes to core activities that override any existing daily and cyclic values. Changes you make in the Core Coverage page are not cyclic. They only affect the day on which you made them. You can delete exceptional changes that you made to core activities.

To delete an exceptional change to a core activity:

1. Open the Core Coverage page:

   Weekly Process > Demand step > Core Coverage tab > Core Coverage page (default)

2. Click  to select a core activity.

   The core activity displays with the time period and number of people shown for each day of the selected week.

3. In the Core Coverage table, double-click the cell of the exceptional change that you want to delete.

4. In the Oracle Workforce Scheduling -Web Page Dialog box, click  on the line of the Core Activities you want to delete.

5. Validate by clicking OK.

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

7. Select the Demand Summary tab.

8. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the special fixed activities caps and does not include them in the Check and Schedule steps

See:
Changing and Initializing Core Activity Profiles
Core Coverage
Making Exceptional Changes to Core Activities
Pre-Scheduling Check
Viewing Core Coverage

Changing Core Activity Profiles

From the Update Core Activities screen, you can change the number of people assigned to a given core activity.

To change the number of people assigned to a core activity:

1. Open the Update Core Activities page:

   Weekly Process > Demand step > Core Coverage tab > Update Core Coverage page
2. Click  to select a core activity.
3. Select the cell of the date you want to edit, and enter a number of persons.
4. On the application bar, click  to save your changes.
5. Select the Demand Summary tab.
6. Click Update Demand to update the Demand Summary tab.

   Note: If you do not update the Demand Summary tab before clicking Confirm and Proceed, OWS discards any changes you made to the special fixed activities caps and does not include them in the Check and Schedule steps

See:
Core Coverage
Deleting Exceptional Changes to Core Activities
Making Exceptional Changes to Core Activities
Pre-Scheduling Check
Viewing Core Coverage

Check

PRE-SCHEDULING CHECK

The Pre-Scheduling Check tab is part of Step 3: Check for the Weekly Process and the Long Term Process for the Weekly and Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) This tab serves several purposes. You can:

- Perform a preliminary check, called the Pre-Scheduling Check, to identify potential scheduling problems.
- Resolve the problems exposed by this check.
- Make exceptional changes to employee hours and schedule absences.

The Pre-Scheduling check identifies potential scheduling problems caused by inconsistencies in your employee data. When OWS finds an inconsistency, it generates an alert containing specific information about the origin of the problem and updates the indicators in the My Issues box. When you investigate the alert, you can remove the inconsistency and rerun the pre-scheduling check. Once you have resolved all critical alerts, you can proceed to the next step.

Weekly Process

Review Employee Schedule Rules

This table provides of a list of all employees, with their available hours and absences for each day of the selected week. You can use this table to schedule and edit absences.

Click  to choose the table display options and click  to filter the data.

Detailed Information

This table displays employee hours. Select an employee and day in the Review Employee Schedule Rules table to display the detailed information. Each column represents an hour. You can use this table to make exceptional changes to employee hours.

Click Next 12 Hrs  to display the hours of the following day.

Long Term Process

Team View Review Employee Schedule Rules

This table provides of a list of all employees, with their available hours and absences for each week of the year. You can use this table to schedule and edit week types, for example, to schedule an upcoming absence week.

Click  to choose the table display options and click  to filter the data.

See: Scheduling a Week type (long term process)

Detailed Information

This table displays employee hours. Select an employee and day in the Review Employee Schedule Rules table to display the detailed information. Each column represents a day.

Daily Absences

This page presents the same information as the Team View, with the exception that the application displays the absence information for each day, not each week. In the Review Employee Schedule Rules table, you can change the zoom to view the time period, such as the month. The Detailed Information table displays information about each day's absence.

Absences

In the Check step, you can view and edit absence information for each employee. These absences are taken into account when you optimize the schedule. In the weekly process, you can schedule part-day and full-day absences; in the long term process you can schedule full-day and week absences.

Weekly Process

You enter daily absence information in the Pre-Scheduling Review Employee Schedule Rules table. The process for entering daily absences in the weekly process is same process as described in Employee Maintenance.

See: Team Information
Scheduling Daily Absences (weekly process)

Long Term Process

You can book absence weeks for your employees in the Check step. The absence weeks serve as placeholders until you enter the daily absence information. You can import or manually enter the daily absence information as the dates approach or when the event occurs. During the scheduling step, OWS uses the daily absence information when it optimizes the schedule and applies the constraints to determine the week types.

See: Scheduling Daily Absences (long term)
Scheduling a Week's Absence (long term process)

Hide Detail / Show Detail

These links enable you to hide or show the Detailed Information tab. Hiding them leaves more space for viewing the Employee Schedule Rules.

My Issues

The My Issues box displays any generated alert and the highest severity level for each Step. Click the link to view the alert Issues list (the link displays only if OWS generates alerts).

See:
Making Exceptional Changes to Employee Hours
Running a Pre-Scheduling Check
Step 3: Check
Viewing Detailed Employee Hours
Departmental Scheduling Process

Buttons	Description
Pre-Scheduling Check	When you begin the Check step, you must first run a check by clicking this button. The Pre-Scheduling Check identifies potential problems in the schedule and generates the corresponding alerts. You cannot generate the schedule until you have resolved all critical alerts.
Confirm and Proceed	Confirms the Pre-Scheduling Check and takes you to the next step: Schedule.

DEMAND SYNTHESIS

The Demand Synthesis tab is part of Step 3: Check. This is the same tab as the one displayed in the Demand step.

This tab provides a graphical view of the workload of an activity for each day of the selected week, or each week of the year, if you have long term processing enabled. You can select an activity and monitor its workload graphically, instead of viewing it as a value in the Filter-level Detail grid. Alternatively, you can view the consolidated workload values for all activities of a store or department.

For the weekly process, the Demand Synthesis tab displays two demand graphs for each day of the selected week.

- Main graph displays the number of employees required for the activity. You can slide the cursor over the graphs to view more information. You can view the number of employees required for the activity, for each quarter hour of the day. The vertical axis of the graph represents the number of employees, and the horizontal axis represents time in hours.
- Total Daily graph displays the number of hours required to complete the activity.

For the long term process, the graph displays the number of employees required for the activity for the week. The vertical axis of the graph represents the number of employees, and the horizontal axis represents time in weeks.

A zoom icon  allows you to display the time period you want to view.

The Demand Synthesis tab contains two pages: View by Activity and View by Business Organization.

View by Activity

From this page, you can view the number of hours required for a chosen activity for each day of the selected week, or each week of the year.

View by Business Organization

From this page, you can view the hour totals for all the activities of a store or a department for each day of the selected week, or each week of the year.

See:
Viewing Hour Requirements of Activities Graphically
Viewing Total Activity Workload for an Organization

TEAM POTENTIAL

The Team Potential tab is part of Step 3: Check of the Long Term Process. The tab provides an assessment of the total workload demand compared to the number of hours each member on the team and the team as a whole can potentially work.

Employee Potential

To determine how an individual employee's potential availability can help resolve scheduling issues, you can view the number of hours per week each employee can be scheduled to work. You can select the employee information to view. The Employee Potential tables displays for each week of the year totals for:

- Maximum potential: The maximum number of hours the employees can be scheduled to work for the selected organizational level. (OWS takes into account the maximum weekly duration, the maximum duration of the week types, the available hours, and the edits made to the schedule.)
- Minimum potential: The minimum number of hours the employees can be scheduled to work for the selected organizational level. (OWS takes into account the minimum weekly duration, the minimum duration of the week types, the available hours, and the edits made to the schedule.)

Team Potential

To more easily view information you can use the zoom icon  to change the time period you are viewing, and the visual marker icon  to create cross-hairs that help you locate information within the graph.

- To use the visual marker, click the icon. As you position your cursor (hover) over different intersections on the graph, the team potential bar displays totals for the total workload, the minimum weekly work duration for the team, and the potential maximum weekly work duration.
- To dismiss the visual marker and restore the team potential bar with its two icons, click anywhere on the team potential graph.

How Tos

Viewing Detailed Employee Hours

In the Check step, you can view the absences and the available time periods for each employee for each day of the selected week.

To view detailed employee hours in the weekly process:

1. Open the Pre-Schedule Check page:

   Weekly Process > Check step
   The Review Employee Schedule Rules table displays the available hours and absences for each employee. A blue triangle indicates original hours (cyclic hours), and a red triangle means that the original hours have been modified for this date.

2. Single-click the cell of your choice. A fuller description of the employee's hours and work hours appears in the Detailed Information table:

   - **Availability**: Total hours the employee is available to work on the day selected
   - **Preferred**: Employee's preferred work hours
   - **Fixed**: Hours the employee must work within a specific time range on that day
   - **Scheduled**: Total hours the employee is available to work on that day
   - **Activity**: Total available hours, broken down by activity.

3. You can click Next 12 Hrs  to display the hours of the following day.

To view detailed employee hours in the long term process:

1. Open the Pre-Sched Check page:

   Long Term Process > Check step > Team View
   The Team View (Review Employee Schedule Rules table) displays the available hours and absences for each employee for each week of the year.

2. Single-click the cell of your choice. A fuller description of the employee's week appears in the Detailed Information table:

   - **Availability**: Total hours the employee is available to work on the day selected
   - **Preferred**: Employee's preferred work hours
   - **Fixed**: Hours the employee must work within a specific time range on that day
   - **Absences**: Daily absence for the week
   - **Scheduled**: Week type such as work week or absence week

See:
Making Exceptional Changes to Employee Hours
Pre-Scheduling Check
Running a Pre-Scheduling Check
Viewing Absences

Making Exceptional Changes to Employee Hours

In the Check step, you can view the absences and available hours of each employee for each day of the selected week. You can make exceptional changes to employee hours that override the default cyclic values. The changes you make here are not cyclic. They only affect the day on which you made them.

To change to a week type for the long term process, see Scheduling a Week Type (long term process).

To make an exceptional change to employee hours for the weekly process:

1. Open the Pre-Sched Check page
   Weekly Process > Check step
   The Review Employee Schedule Rules table displays. This table shows the available hours and absences for each employee.
2. Click the cell that contains the information you want to change. A description of the employee's hours and work hours appears in the Detailed Information table:
   - **Availability**: Total hours the employee is available to work on the day selected
   - **Preferred**: Employee's preferred hours
   - **Fixed**: Hours the employee must work within a specific time range on that day
3. In the Detailed Information table, double-click the shift you want to modify.

   You can modify Availability, Preferred, or Fixed hours.
4. Modify the timing when the change takes effect:
   - If the modified hours fall on the following day, select the next day box.
   - If only part of the modified hours fall on the following day, do not select the next day box.
5. Click Update.

   The modified employee hours are shown at the top of the dialog box. A star appears if the hours start or end on the following day.
6. Click OK.

   The modified hours are shown in the Detailed Information table, and OWS updates the Review Employee Schedule Rules table (for availability hours). The red triangle and the icon indicate that you have modified the original cyclic hours. You can click Next 12 Hrs in the Detailed Information table to display employee hours for the following day

See:
Pre-Scheduling Check
Running a Pre-Scheduling Check

Scheduling Daily Absences (weekly process)

In the Check step, you can view the absences and available hours of each employee for each day of the selected week. You can also schedule and edit employee absences. These absences are taken into account when you optimize the schedule.

To schedule an employee absence:

1. Open the Pre-Sched Check page:

   Weekly Process > Check step

   The Review Employee Schedule Rules table displays the available hours and absences for each employee.

2. On the application bar, select a date, and then click  to select a team.
3. Double-click the cell you want to modify in the Review Employee Schedule Rules table to display a dialog box where you can change the daily absence information.
4. Click a type of absence on the left side of the Detail pane, such as Absence or Vacation.
5. Enter values in the right side of the Detail pane:
   - Daily Duration represents the total number of hours.
   - Enter the time for Part Day Absence in the Start and End fields. These hours are the actual hours the employee will be absent.
   - If the absence falls on the following day, select the Next Day check box.
   - If only part of the absence falls on the following day, do not select the Next Day check box.
   - No values are required for Day Off absences.

   Selecting a different type of absence overwrites the existing absence.
6. Click Add.

   The type of absence appears in the top pane, with its color code and in the Detailed Information table.
7. To delete an absence, select the absence in the top pane and click  .
8. When finished, click OK to confirm.

   OWS updates the Review Employee Schedule Rules table.
9. On the application bar, click  to save your changes.

   Note: You can also schedule a daily absence for the employee from the Employee Maintenance module. See: Team Information

See: Locking Employee Work Hours

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

See:
Pre-Scheduling Check
Running a Pre-Scheduling Check
Scheduling Absences (Employee Maintenance)
Viewing Absences (Employee Maintenance)
Viewing Detailed Employee Hours

Scheduling Daily Absences (long term process)

The Check step includes a Daily Absence page for recording each day's absence information. From this page, you can enter detailed information about each day's absence. These absences are taken into account when you optimize the schedule

To schedule a day's absence in the Pre-Schedule Check:

1. Open the Daily Absences page:

   Long Term Process > Check step > Daily Absences
2. On the application bar, select a date, and then click  to select a team.
3. Double-click the cell you want to modify in the Team View (Review Employee Schedule Rules table).
4. Click a type of absence on the left side of the Detail pane, such as Absence or Jury Duty.
5. Enter Duration values in the right side of the Detail pane:

   The Duration represents the absence allowance This duration is used in the schedule's weekly work duration. Selecting a different type of absence overwrites the existing absence.
6. Click Add.

   The type of absence appears in the top pane, with its color code.
7. To delete an absence, select the absence in the top pane and click  .
8. When finished, click OK to confirm.

   OWS updates the Review Employee Schedule Rules table.
9. On the application bar, click  to save your changes.

Note: You can also schedule a daily absence for the employee from the Team Information page of the Employee Maintenance module.

See: Team Information
Pre-Scheduling Check
Running a Pre-Scheduling Check
Scheduling Absences
Viewing Absences
Viewing Detailed Employee Hours

Scheduling a Week Type (long term process)

The scheduled weeks are identified by the type of week associated to each employee's contract. During set up, the administrator defines week types such as work weeks, vacation, and absence weeks.

When OWS optimizes the schedule, the application assigns week types to the employee. Before requesting schedule optimization, you have the option to schedule different week types for specific employees.

OWS provides an interface for accomplishing this from the dialog box, where you can view and change the week types in the Check step or the Schedule step. Where you change the week type depends on what stage of the scheduling process you have reached. You might change the week type and duration in the:

- Pre-Schedule Check step when you are making adjustments and entering absence information prior to rescheduling or creating an optimized schedule
- Schedule step when you are reviewing the optimized schedule results, and you need to adjust an employee's schedule.

The process for scheduling a week type is basically the same, with the exception that in the Schedule step you can lock the week type and duration.

To schedule or edit an employee week type from the Check step:

1. Click the Long Term Process tab:

   Long Term Process > Check step > Pre-Schedule Check
2. On the application bar, click  to select a team.
3. Choose the time period to view using the zoom icon  .
4. In the Team View (Review Employee Schedule Rules table), double-click the cell in which you want to enter or change a week type.

   A dialog box opens with the work week type and its default duration is displayed at the top of the dialog box.
5. Select the appropriate week type in the Detail pane. Selecting a different type of week overwrites the existing one.
6. Position your cursor over the question mark next to the word Duration and hover over the question mark to display the minimum and maximum work duration for the week type.
7. To change the duration for a work week, click the time in the Detail pane, enter a new value and click Update. Click OK to confirm.

   The Team View is updated. At the bottom of the page, if the detailed information tab is active, the employee's information is updated.
8. On the application bar, click  to save your changes.

To schedule or edit an employee week type from the Scheduling step:

1. Click the Long Term Process tab:

   Long Term Process > Check step > Pre-Schedule Check

2. On the application bar, click  to select a team.

3. Choose the time period to view using the zoom icon  .

4. In the Team Long Term Schedule, double-click the cell in which you want to schedule a week type.

   A dialog box opens with the work week type and its default duration is displayed at the top of the dialog box.

5. Select the appropriate week type in the Detail pane. Selecting a different type of week overwrites the existing one.

6. Position your cursor over the question mark next to the word Duration and hover over the question mark to display the minimum and maximum work duration for the week type.

7. To change the duration for a work week, click the time in the Detail pane, enter a new value and click Update. Click OK to confirm.

   The Long Term Schedule is updated. At the bottom of the page, if the Individual Schedule tab is active, the employee's schedule is updated.

   Note: You can use the Lock All, Lock Type, and Lock Duration options from the Long Term Schedule table to lock the schedule of an employee or the whole team, as well as the week type and week duration.

   See: Locking Employee Work Hours

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

Scheduling a Week's Absence (long term process)

The scheduled weeks are identified by the type of week associated to each employee's contract such as work weeks, vacation, and absence weeks. Before optimizing the schedule, you can schedule different week types for specific employees; for example, to record an employee's planned vacation, or an absence week to personal leave or maternity leave.

OWS provides an interface for accomplishing this from the dialog box, where you can add absence weeks.

Note: To schedule daily absences, you use the Check Step > Daily Absences page.

See: Scheduling Daily Absences (long term process)

To schedule a weekly absence:

1. Click the Pre-Schedule Check tab:

   Long Term Process > Pre-Schedule check > Team View (Review Employee Schedule Rules table)

2. On the application bar, click  to select a team.
3. Choose the time period to view using the zoom icon  .
4. In the Team View (Review Employee Schedule Rules table), double-click the cell in which you want to schedule the absence week.

   A dialog box opens with the work week type and its default duration is displayed at the top of the dialog box.
5. Select the appropriate week type in the Detail pane, such as an absence or vacation week. Selecting a different type of week overwrites the existing one.
6. Position your cursor over the question mark next to the word Duration and hover over the question mark to display the minimum and maximum work duration for the week type.

   - To accept the default duration for the absence week, click Add. Click OK to confirm.
   - To change the duration for an absence week, click the duration hours, enter a new value for the number of hours and minutes (such as 20:30 for 20 hours and 30 minutes), and click Add. Click OK to confirm.

   At the bottom of the page, if the Detailed Information tab is active, the employee's pre-schedule information is updated.
7. To delete an absence, select the absence week in the top pane of the Detail pane and click  .
8. On the application bar, click  to save your changes.

Running a Pre-Scheduling Check

To begin the Check step, you must run a pre-scheduling check to identify potential scheduling problems. This procedure outlines the basic steps.

To run a pre-scheduling check:

1. Open the Pre-Sched Check page:
   Weekly Process or Long Term Process > Check step
2. Click Pre-Scheduling Check.

   OWS checks for inconsistencies and generates alerts.
3. Fix any critical problems.

   The My Issues box shows the severity levels for each Step. You can click on the step names to view the alert Issues list, which helps you identify the problem. You must resolve red alerts before you can proceed to the Schedule step. Removing yellow and green alerts is optional.
4. Click Pre-Scheduling Check to run the check again.

   - If there are no more red alerts, you can click Confirm and Proceed to go to the Schedule step.
   - If there are still red alerts, fix the problems, and then click Pre-Scheduling Check again. Repeat the process until all red alerts are gone, and then click on Confirm and Proceed.

See:
Making Exceptional Changes to Employee Hours
Pre-Scheduling Check
Viewing Detailed Employee Hours

Schedule

LONG TERM SCHEDULE

The Long Term Schedule tab is part of Step 4: Schedule. From this tab, you can submit your schedule for optimization. OWS performs schedule optimization by comparing the requirements from the Demand step with employee availabilities, constraints, and skills.

The long term schedule displays the weekly schedule for each employee for the entire year. The weeks are identified by the type of week associated to the employee's contract. Your administrator defines week types such as work weeks, vacation, and absence weeks during setup and associates these week types to contracts.

When OWS optimizes the schedule, the application assigns week types to the employee. Before requesting schedule optimization, you can schedule different week types for your employees, such as changing a work week to an absence week to reflect an upcoming vacation. Once you have optimized the schedule, you can view and confirm it, before proceeding to the final step in the scheduling process.

Team Long Term Schedule

This table displays the week types of each employee on the selected team over the year.

Using the zoom icon  you can restrict the view of the schedule to the time period you want to view.

You can update the employee work schedules, and also prevent further changes to the schedule by locking the week type, the week duration, and the schedule. You can lock the schedule of an employee for the week, several weeks, or the year; or lock the schedule the entire team for a specific week or sequence of weeks. After locking the work weeks, you can choose to re-optimize an existing schedule by rescheduling or creating the schedule again. When re-optimizing and regenerating the schedule, OWS does not update the locked or fixed work weeks or durations.

You can also change the view of the displayed information by clicking  to filter the data, or  to choose the table display options.

Individual Schedule

This region shows individual employee work days for the selected week. You select the week and employee by clicking the appropriate cell in the Team Long Term Schedule table. The schedule identifies the week types, the week duration, and the standard information about available work times and preferences.

Actual Hours

The Actual Hours page displays the week types and total daily hours recorded for the employee. When the actual hours are imported, OWS displays the actual hours in the Actual Hours Review region. An Actual Hours Validation button launches a process in which OWS calculates the week types based on the actual hours and displays the week type information in the Actual Long Term Schedule region. You can view, but not edit this

information. OWS takes into account the actual hours worked to date when rescheduling the hours for the remaining weeks of the year. After rescheduling, the actual hours replace projected hours in the Schedule Variance calculation, so that you have up-to-date statistics.

See:
Rescheduling Using Actual Hours

Hide Detail / Show Detail

With these links, you can hide or show the Individual Schedule tabs. Hiding them leaves more space for viewing the Team Weekly Schedule table.

My Issues

The My Issues box displays the generated alert and the highest severity level. Click the links in the My Issues box to view the issues list.

Schedule Revisions

To improve schedule quality, resolve conflicts, or modify individual schedules, you may wish to make changes to an optimized schedule. These changes then need to be incorporated into the schedule. There are two ways to do this:

- You can apply the changes directly to an existing optimized schedule.

  The schedule is not re-optimized. OWS checks the schedule. You must resolve any critical alerts that are generated. If you have a working schedule you use regularly, and you are simply making minor changes, this approach avoids completely reorganizing established individual schedules.

- You can re-optimize the schedule, If you make multiple or global changes:
  - Rescheduling -- OWS generates an optimized schedule, using any imported actual and posted data, and any fixed or locked schedule information.

    This schedule contains the incorporated changes that comply with the rescheduling policies defined in the OWS Designer. The rescheduling policies are related to contracts. As an example, if the administrator defines 35 hours as the weekly duration for full-time employees, the duration is used as a constraint when rescheduling employees who have that full-time contract.
  - Creating the schedule again -- OWS generates a new optimized schedule that does not use imported actual and posted data, but does use fixed and locked schedule information.

    OWS does not consider the global policies defined in the OWS Designer when it generates a new schedule.

Note: Changes made in the weekly process, such as absences, days off, and the actual hours worked by employees are reflected in the long term process. Changes made to the long term process, such as adding absence weeks or daily absence information are reflected in the weekly process, but rescheduling changes will not be reflected until you reschedule the weekly process.

Before regenerating the schedule, you can:

- Lock the Week Types, so that the week type assigned the employee remains the same (triangle appears next to the week type name in the table)
- Lock the Duration, so that the number of work hours for that week remains the same (a circle appears next to the week type name in the table)
- Lock All to lock one or more weeks for an employee and avoid creating a schedule for that person

If you make extensive manual revisions, for example when rescheduling weeks due to absences, and you want to roll-back those changes, you can clear the existing shift information for the year. Clearing the schedule deletes all team week type information with the exception of absences and locked week types and durations.

Schedule optimization may generate alerts. You must resolve red alerts by changing the data that generated them before you can post the schedule.

Job Status

Depending on the configuration, the application displays the optimization status as a text message at the top of the page or as an icon next to the corresponding job button with an icon tool tip that provides details about the status of the job.

For example: The "Job never launched" message appears if you have not optimized a schedule. If optimization is in progress, a message supplies the start date for the job that is running. If the application has completed the job, a message informs you when the job successfully finished.

Buttons	Description
Create Schedule	Submits the schedule for optimization.
Check Schedule	Incorporates any changes you made in the Schedule step, but does not re-optimize the entire schedule. Checks the schedule and generates any alerts. This is useful if you only made a few changes.
Reschedule	Re-optimizes an already existing schedule by considering some additional constraints.
Confirm and Proceed	Confirms your schedule. If there are no critical alerts, it takes you to the next step: Post.

See:
Employee Maintenance Overview
Scheduling and Editing Employee Activities
Step 4: Schedule
Submitting a Schedule for Optimization
Viewing Team Schedules
Viewing Individual Schedules
Locking Employee Work Schedules
Departmental Scheduling Process

WEEKLY SCHEDULE

The Weekly Schedule tab is part of Step 4: Schedule. From this tab, you can submit your schedule for optimization. OWS performs schedule optimization by comparing the hourly requirements from the Demand step with employee availabilities, constraints, and skills.

Before requesting schedule optimization, you have the option to schedule activities for specific employees (through the Team Weekly Schedule table). These activities become constraints that the optimization process takes into account.

Once you have optimized the schedule for the week (weekly schedule combined with the daily schedule), you can view and confirm it, before proceeding to the final step in the Weekly Process.

Due to an event in the middle of the week such as an unplanned absence, you may need to recompute the entire schedule to correct the workload coverage. Before regenerating the schedule, you can lock the work hours for specific employees to avoid creating schedules for them.

If you make extensive manual revisions, for example when rescheduling shifts due to an absence, and want to roll-back those changes, you can clear the existing shift information for the week or a given day. Clearing the schedule deletes all team shift information with the exception of absences, loan, and special fixed activity information.

Schedule optimization may generate alerts. You must resolve red alerts by changing the data that generated them before you can post the schedule.

Team Weekly Schedule

This table displays the weekly schedule of each employee on the selected team. By selecting the type of display, you can view the schedule by hours or by activity. At setup administrator assigns a color to represent each type of activity. The team weekly schedule and individual schedule identify employees you lend to another location and employees on loan to you. You can schedule activities for the employees on loan to you.

From this table, you can also update and lock the weekly or daily schedules of employees. You lock the schedule of an employee for the entire week, or the activities of the whole team for a specific day or sequence of days.

After locking the work hours, you can choose to re-optimize an existing schedule by rescheduling or creating the schedule again. When re-optimizing, OWS does not update the locked work hours, nor does it observe global policies for locked hours. (The locked hours may be inconsistent with the global policies.)

When OWS regenerates the schedule, it does not reschedule the employee's locked work hours. Click  to choose the table display options and click  to filter the data.

The  icon to the right of a table cell means that the employee is absent for part of the day.

Individual Schedule

This tab shows individual employee hours and work hours for the selected day. You select the time and employee by clicking the appropriate cell in the Team Weekly Schedule table.

The schedule identifies employees you lend to another location with the name of the destination store or department and loan information. For employees on loan to you, the application adds the person to your schedule and labels each loan period with the person's originating store or department and loan information.

Demand Coverage

This tab contains a graph showing the current schedule's staffing coverage for the week. Coverage is shown for the activity that you select from the  list. The vertical axis represents hours.

The red line represents demand, the yellow region represents over staffing and the maroon region shows understaffing. You can see the hourly amount of understaffing or over staffing, as well as other information by moving the cursor over the graph.

Hide Detail / Show Detail

With these links, you can hide or show the Individual Schedule and Demand Coverage tabs. Hiding them leaves more space for viewing the Team Weekly Schedule table.

My Issues

The My Issues box displays the generated alert and the highest severity level. Click the links in the My Issues box to view the issues list.

Job Status

Depending on the configuration, the application displays the optimization status as a text message at the top of the page or as an icon next to the corresponding job button with an icon tool tip that provides details about the status of the job.

For example: The "Job never launched" message appears if you have not optimized a schedule. If optimization is in progress, a message supplies the start date for the job that is running. If the application has completed the job, a message informs you when the job successfully finished.

See:
Employee Maintenance Overview
Scheduling and Editing Employee Activities
Step 4: Schedule
Submitting a Schedule for Optimization
Viewing Scheduled Hours or Activities
Viewing Individual Schedules

Locking Employee Work Hours
Departmental Scheduling Process

Buttons	Description
Create Schedule	Submits the schedule for optimization.
Check Schedule	Incorporates any changes you made in the Schedule step, but does not re-optimize the entire schedule. Checks the schedule and generates any alerts. This is useful if you only made a few changes.
Reschedule	Re-optimizes an already existing schedule by considering some additional constraints.
Confirm and Proceed	Confirms your schedule. If there are no critical alerts, it takes you to the next step: Post.

DAILY SCHEDULE

The Daily Schedule tab is part of Step 4: Schedule. From this tab, you can submit your schedule for optimization. OWS performs schedule optimization by matching the hourly requirements from the Demand step against employee availabilities, constraints, and skills.

Before requesting schedule optimization, you have the option to schedule activities for specific employees (through the Team Daily Schedule table). These activities become constraints that the optimization process takes into account.

Once you have optimized the schedule for the week (the weekly schedule combined with the daily schedule), you can view and confirm it.

Due to an unpredictable event in the middle of the week (for example, an employee's unplanned absence), you may need to recompute the whole schedule to correct the workload coverage. Prior to regenerating the schedule, you can lock the work hours for certain employees to avoid creating schedules for them. You can use the Lock all or Lock start/end options (from the Team Weekly Schedule).

If you make extensive manual revisions during the rescheduling planning process, and want to roll-back those changes, you can clear the existing shift information. Clearing the schedule deletes all team shift information with the exception of absences and loan information.

Schedule optimization may generate alerts. You must resolve red alerts by changing the data that generated them before you can post the schedule.

Team Daily Schedule

This table displays the daily schedule of each employee on the selected team. The table uses a different color to represent each type of activity.

You can also use this table to schedule or edit employee activities.

Click  to choose the table display options and click  to filter the data.

Individual Schedule

This tab displays individual employee hours and work hours for the day. You select the employee by clicking the appropriate cell in the Team Daily Schedule table.

The schedule labels the shifts of employees on loan to you and the employees you lent to another location with the loan information. You can schedule activities for the employees on loan to you.

Demand Coverage

This tab contains a graph showing the current schedule's staffing coverage for the day. Coverage is shown for the activity that you select from the  list. The vertical axis represents hours.

The red line represents demand, the yellow region represents over staffing and the maroon region shows under staffing. You can see the hourly amount of under staffing or over staffing as well as other information by moving the cursor over the graph.

Hide Detail / Show Detail

With these links, you can hide or show the Individual Schedule and Demand Coverage tabs. Hiding them leaves more space for viewing the Team Daily Schedule table.

My Issues

The My Issues box displays the generated alert for each step of the weekly process and the highest severity level. Click the links to view the alert Issues list (the links display only if OWS generates alerts).

Job Status

Depending on the configuration, the application displays the optimization status as a text message at the top of the page or as an icon next to the corresponding job button with an icon tool tip that provides details about the status of the job.

For example: The "Job never launched" message appears if you have not optimized a schedule. If optimization is in progress, a message supplies the start date for the job that is running. If the application has completed the job, a message informs you when the job successfully finished.

See:
Employee Maintenance Overview
Viewing Individual Schedules
Scheduling and Editing Employee Activities
Step 4: Schedule
Submitting a Schedule for Optimization
Departmental Weekly Process

Buttons	Description
Create Schedule	Submits the schedule for optimization.
Check Schedule	Incorporates any changes you made in the Schedule step, but does not re-optimize the entire schedule. Checks the schedule and generates any alerts. This is useful if you only made a few changes.
Reschedule	Re-optimizes an already existing schedule by considering some additional constraints.

Confirm and Proceed	Confirms your schedule. If there are no critical alerts, it takes you to the next step: Post.

DAILY KPIS

The Daily KPIs tab is part of Step 4: Schedule. This tab shows the daily Key Performance Indicators (KPIs) for the weekly schedule. These KPIs cover the entire store (all personnel and all activities). On this page, the KPIs are always up-to-date; no refresh is required.

To view KPIs for each department, see Dashboards Overview.

Schedule Analysis

Demand Hours	Daily hour requirements as defined in the Demand step. This is the same value as displayed on the Demand Summary line of the Demand Summary page, when you have all activities selected.
Scheduled Hours	Total daily hours scheduled in the weekly schedule.
Demand Coverage (%)	Total daily hours scheduled divided by total daily hour requirements (Demand Hours).
Scheduled Productive Costs	Scheduled worked hours per employee multiplied by the average pay rate of each employee.
Schedule Efficiency (%)	Daily measure of how well the workload has been covered. 100% corresponds to no over staffing or under staffing.

Store Sales

Budget	Sales target as displayed on the Budget Sales line of the Forecast Summary page, when you select a store. This value is set at the corporate level.
Forecast	Daily sales forecasted in the Forecast step, in USD. This is the same value as displayed on the Adjusted Forecast line of the Forecast Summary page, when you have only dollar drivers selected.
Actual	Actual sales generated by the store. This value is imported from the external application each night.

Store Costs

Budget	Labor cost target. This value is set at the corporate level.
Scheduled	Total daily cost of labor according to the optimized weekly schedule.
Actual	Actual labor cost. This value is imported from the external application each night.

My Issues

The My Issues icon shows whether alerts have been generated, and their highest severity level. You can click on this link to view the alert Issues list.

See:
Dashboards Overview
Demand Summary
Forecast Summary
Step 4: Schedule

WEEKLY KPIS

The Weekly KPIs tab is part of Step 4: Schedule of the long term process.

This tab shows the key performance indicators (KPIs) for the long term process, and displays the data for each week of the year. The KPIs cover the entire store (all personnel and all activities). On this page, the KPIs are always up-to-date; no refresh is required.

To view KPIs for each department, see Dashboards Overview.

Schedule Analysis

Demand Hours	Weekly hour requirements as defined in the Demand step. This is the same value as displayed on the Demand Summary line of the Demand Summary page, when you have all activities selected.
Scheduled Hours	Total weekly hours scheduled in the long term schedule (absences not included).
Demand Coverage (%)	Total weekly hours scheduled divided by total weekly hour requirements (Demand Hours).
Scheduled Costs	Scheduled worked hours per employee multiplied by the average pay rate of each employee.

Store Sales

Budget	Yearly sales target as displayed on the Budget Sales line of the Forecast Summary page, when you select a store. This value is set at the corporate level.
Forecast	Weekly sales forecasted in the Forecast step, in USD. This is the same value as displayed on the Adjusted Forecast line of the Forecast Summary page, when you have dollar drivers selected.
Actual	Actual sales generated by the store. This value is imported from the external application each night.

Store Costs

Budget	Labor cost target. This value is set at the corporate level.
Scheduled	Total weekly cost of labor according to the optimized long term schedule.
Actual	Actual labor cost. This value is imported from the external application.

My Issues

The My Issues icon shows whether alerts have been generated, and their severity level. You can click on this link to view the alert Issues list.

See:
Dashboards Overview
Demand Summary
Forecast Summary
Step 4: Schedule

DEMAND ANALYSIS

The Demand Analysis tab is part of Step 4: Schedule. This tab provides a graphic view of the staffing requirements. The graph at the center shows the level of understaffing or overstaffing relative to the hourly requirements for each hour. The Total Daily graph displays the number of hours required to complete the activity.

In the graphs, the red line represents demand, the yellow region represents overstaffing, and the maroon region shows understaffing. To see the hourly amount of understaffing or overstaffing, as well as other information, move the cursor over the graph.

Weekly Schedule

The Demand Analysis tab contains two pages: View by Activity and View by Business Organization.

You can select an activity and monitor its workload graphically, instead of viewing it as a value for each individual day in the Filter-level Detail grid. Alternatively, you can view the consolidated workload values for all activities of a store or department. You can also view the staffing requirements for an individual activity or all the activities collectively for each quarter hour of the day.

- View by Activity

  You can view the number of hours required for a chosen activity in the Total Daily graph for each day of the selected week. From the graph at the center, you can view the number of employees required for the activity for each quarter hour of the day.

- View by Business Organization

  You can view the hour totals for all the activities of a store in the Total Daily graph for each day of the selected week. From the graph at the center, you can view the number of employees required for all the activities for each quarter hour of the day.

Long Term Schedule

The Demand Analysis displays the workload by business organization. You can view the hour totals for all the activities of a store for each week of the year. In the graphs, the red the red line represents demand, the yellow region represents over staffing and the maroon region shows understaffing. To see the weekly amount of understaffing or over staffing, as well as other information, move the cursor over the graph.

See:
Demand Summary
Viewing Hour and Staffing Requirements Graphically

SCHEDULE VARIANCE

The Schedule Variance tab is part of Step 4: Schedule for long term scheduling. You can refer to the data and graph on this page to monitor the employee's schedule as the year progresses and to respond by making schedule adjustments, as required.

Schedule Variance

OWS uses the results from the Schedule step to generate the weekly variance and schedule variance. If you import actual hours, the next time you reschedule, OWS uses the actual numbers that you imported as a basis for calculating the weekly and schedule variances. These updated numbers provide you with the necessary tools to evaluate the employee's schedule.

Scheduled Hours	The total number of weekly hours scheduled for each week of year.
Cumulated Scheduled Hours	The total number of hours scheduled for the employee from the beginning of the year.
Weekly Variance	The difference between the number of hours scheduled for the week and the weekly contractual duration.
Schedule Variance	The difference between the number of hours scheduled and the weekly contractual duration. This amount is accumulated from the beginning of the schedule year. By the end of the year, the variance should be zero when the yearly contract duration has been met.

See:
Long Term Schedule

How Tos

Viewing Team Schedules

The Weekly Schedule tab displays details about the employee's hours and activities (weekly process). The Long Term Schedule displays details about the employee's work weeks and actual hours (long term process).

Filters further define which type of information on the schedule you view.

See: Using Filters

To view the weekly process schedule by hours or activities:

1. Open the Weekly Schedule page:

   Weekly Process > Schedule step
2. Click  to select a team.
3. Select a type of display: View by Work Hours (default) or View by Activities.

To view the long term process schedule by weeks or actual hours:

1. Open the Long Term Schedule page:

   Long Term Process > Schedule step
2. Click  to select a team.
3. Select a type of display: Long Term Schedule (default) or Actual Hours.

See:
Employee Maintenance Overview
Scheduling and Editing Employee Activities
Submitting a Schedule for Optimization
Team Information
Viewing Individual Schedules
Weekly Schedule

Viewing Hour and Staffing Requirements Graphically

For the weekly process, the Demand Analysis tab provides a graphical view of the staffing requirements and the activity workload by either activity or business organization for each day of the selected week.

For the long term process, the Demand Analysis displays the week total for all activities of a store.

To view the hour and staffing requirements for a single activity (weekly process):

1. Open the View by Activity page:

   Weekly Process > Schedule step > Demand Analysis

2. Click  to select an activity.

   The Total Daily graphs display the total hours required for the selected activity for each day of the week. The graphs at the center display the number of employees required for the chosen activity in 15-minute intervals for a day.
   Both the graphs display the level of under staffing or over staffing relative to the hourly requirements.

   Note:The red line represents demand, the yellow region represents over staffing and the maroon region represents under staffing. You can move the cursor over the graphs to see the hourly amount of under staffing or over staffing as well as other information.

To view the consolidated hour and staffing requirements for all store activities (weekly process):

- Open the View by Business Organization page:

  Weekly Process > Schedule step > Demand Analysis

  The graphs at the center display the number of employees required for all the activities in 15-minute intervals for a day. The consolidated graph at the right (Total Daily graph) displays the total number of hours required for each day.

  Both the graphs display the level of under staffing or over staffing relative to the hourly requirements.

  Note:The red line represents demand, the yellow region represents over staffing and the maroon region represents under staffing. You can move the cursor over the graphs to see the hourly amount of under staffing or over staffing as well as other information.

To view the consolidated hour and staffing requirements for all store activities (long term process):

- Open the View by Business Organization page:

  Long Term Process > Schedule step > Demand Analysis

  You can view the hour totals for all the activities of a store for each week of the year.

In the graph, the red line represents demand, the yellow region represents over staffing and the maroon region shows understaffing. To see the weekly amount of understaffing or over staffing, as well as other information, move the cursor over the graph., and each week of the long term process, if long term scheduling is enabled.

See:
Demand Analysis
Weekly Schedule
Demand Summary

Viewing Individual Schedules

The Schedule tab displays details about the employee's schedules.

To view an individual schedule (weekly process):

1. Click the Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab

2. Select the employee in the team schedule to see details for that person in the Individual Schedule. The Individual Schedule displays the day divided into hourly segments:

   - **Availability**: The range of hours the employee is available for work.
   - **Preferred**: Employee's preferred hours.
   - **Fixed**: Hours the employee must work within a specific time range on that day.
   - **Scheduled**: Total hours the employee is scheduled to work on that day.
   - **Activity**: Total scheduled hours, broken down by activity.

   Note: Scheduled and Activity contain information about the scheduled day, if you have generated the schedule.

To view an individual schedule (long term process):

1. Click the Schedule tab:

   Long Term Process > Schedule step > Long Term Schedule

2. Select the employee in the team schedule to see details for that person in the Individual Schedule. The Individual Schedule displays the week divided into daily segments.

   - **Availability**: The range of hours the employee is available for work each day that week.
   - **Preferred**: Employee's preferred hours.
   - **Fixed**: Hours the employee must work within a specific time range on that day.
   - **Scheduled**: Total hours the employee is scheduled to work on that day.
   - **Absences**: Total hours the employee is scheduled to be absent on that day.

   Note: Scheduled contains information about the scheduled week type, if you have generated the schedule.

See:
Daily Schedule
Scheduling and Editing Employee Activities
Finding a Replacement
Submitting a Schedule for Optimization

Scheduling and Editing Employee Activities (weekly process)

Before or after schedule optimization, you can manually schedule activities for specific employees and edit scheduled activities. OWS provides two interfaces for accomplishing this:

- Dialog box: From the dialog box, you can schedule activities and shift times manually. You can also edit scheduled activities.
- Pop-up menu: With the pop-up menu, you can cut, copy, paste, swap, and delete scheduled activities. It avoids having to re-enter both the scheduled activities and the shift times.

If you have scheduled someone for a work day or shift and need to replace that person, you can find a replacement for that person. See: Finding a Replacement

To schedule or edit an employee activity using the dialog box:

1. Click the Weekly Schedule or Daily Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab
2. On the application bar, click  to select a team.
3. In Weekly Schedule, choose the type of display: View by Work Hours or View by Activities.
4. In the Team Weekly Schedule or Team Daily Schedule table, double-click the cell in which you want to schedule or edit an activity.

   A dialog box opens.
5. Select an activity in the Detail pane.

   If an activity is not among the preferred activities of the employee whose schedule you are modifying, a  appears next to it. This alert is provided for information purposes only. You can still select the activity.

   Note: This icon also appears for certain special fixed activities, such as meetings, which are simply not available in the Activity List. See: Scheduling Rules
6. Specify the Start and End times for the activity, and click Add.

   The activity appears in the top pane. You can schedule several activities for the same day. The total work time appears on the Work Day line. If two or more shifts overlap, the last scheduled shift overwrites any existing overlapping hours.
7. To change the time of a scheduled activity, select the activity in the top pane, change the time in the right pane, and click Update.
8. To delete a scheduled activity, select the activity in the top pane and click  .
9. Click OK to confirm.

   The Team Weekly Schedule or Team Daily Schedule updates. At the bottom of the page, if the Individual Schedule tab is active, the employee's schedule and activities are updated. If the Demand Coverage tab is active, and if one of the new

or modified activities is selected in the Select an activity list, the graph is updated.
Note:You can use the Lock all or Lock start/end options from the Team Weekly Schedule table to lock the schedule of an employee or the whole team. The optimization process of OWS does not update the work hours that have been fixed for employees, while creating a schedule. See: Locking Employee Work Hours

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

To edit employee activities using the pop-up menu:

1. Click the Weekly Schedule or Daily Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab

2. In the application bar, click  to select a team.
3. In Weekly Schedule, choose the type of display: View by Work Hours or View by Activities.
4. In the Team Weekly Schedule or Team Daily Schedule table, use the pop-up menu commands:

   You can use the pop-up menu commands for cells on different lines. At the bottom of the page, if the Individual Schedule tab is active, the employee's schedule and activities are updated. If the Demand Coverage tab is active, and if one of the new or modified activities is selected in the Select an activity list, the histogram is updated.

   Note:You can use the Lock all or Lock start/end options from the Team Weekly Schedule table to lock the schedule of an employee or the whole team. The optimization process of OWS does not update the work hours that have been fixed for employees, while creating a schedule.

   See Locking Employee Work Hours

To	Do this	Shortcut	Result
Cut	Right-click cell + Cut	Click cell + Ctrl X	The contents of the cell is removed and placed in the Clipboard.
Copy	Right-click cell + Copy	Click cell + Ctrl C	The contents of the cell are copied to the Clipboard.
Paste	Right-click cell + Paste	Click cell + Ctrl V	The contents of the Clipboard are pasted to the cell.
Swap	• Left-click cell A • Ctrl + left-click cell B • Right-click either cell + Swap	• Left-click cell A • Ctrl + left-click cell B • Ctrl S	The contents of the two cells are switched.
Delete	Right-click cell + Delete	Click cell + Del	The contents of the cell are deleted.

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

See:
Daily Schedule
Submitting a Schedule for Optimization

Locking Employee Work Schedules

You can use the options to lock the:

- The employee's schedule, type of week, and week duration for one or more weeks
- Activities of one employee, several employees, or the entire team for a day or for a series of days

The optimization process of OWS does not update the work hours that have been locked for employees. Once you have locked the work hours, you can choose to re-optimize an existing schedule.

Weekly Process

To lock employee work hours:

1. Click the Schedule tab:

   Weekly Process > Schedule step

   You can perform the same actions described below on the Daily and Weekly Schedules.

2. On the application bar, click  to select a team.
3. Select the appropriate cell in the Team Weekly Schedule table. From the menu, select one of the following menu items:

   - Lock All: Locks an employee's schedule for a particular day. When you Create Schedule or Reschedule, the application does not re-create the employee's schedule for that week.
   - Lock Start/End: Locks the start and end time of an employee's work day.
   - Unlock: Reverses the Lock All or the Lock Start/End options.

   You can also use the short-cut after selecting a cell, row, or column and right-click to choose the menu option .For example, right-click the cell in the table to lock a shift. Right-click a person's name to select the entire week for the individual. Right-click a day of the week to select the entire day for the team.

4. After locking the day or shift, you can click Create Schedule or Reschedule to generate a new, completely optimized schedule. When re-optimizing, the application does not update the locked work hours, nor does it observe global policies for locked hours. (The locked hours may be inconsistent with the global policies.)

   See: Submitting a Schedule for Optimization

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

Long Term Process

To lock employee work weeks:

1. Click the Schedule tab:

   Long Term Process > Schedule step > Long Term Schedule

2. On the application bar, click  to select a team.
3. Select the appropriate cell in the Team Long Term Schedule table. From the menu, select one of the following menu items:

   - Lock All: Locks an employee's schedule for a particular week. When you click Create Schedule, the application does not re-create the employee's schedule for that week. (The lock does not apply to Rescheduling)
   - Lock Type: Locks the week type assigned the employee so that the week type remains the same (triangle appears next to the week type name in the table)
   - Lock Duration: Locks the number of work hours for that week so they remain the same (a circle appears next to the week type name in the table)
   - Unlock: Reverses the Lock All

4. You can also use the short-cut after selecting a cell, row, or column and right-click to choose the menu option .For example, right-click the cell in the table to lock a week. Right-click a person's name to select the entire year for the individual. Right-click a week to select the entire week for the team
5. After locking the week, you can click Create Schedule or Reschedule button to generate a new, completely optimized schedule.

   When re-optimizing, the application does not update the locked work weeks, nor does it observe global policies for locked weeks. (The locked weeks may be inconsistent with the global policies.)

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

See:
Weekly Schedule
Daily Schedule
Submitting a Schedule for Optimization

Scheduling Employees Loaned to You

When another store or department lends you an employee, the application adds that employee to your schedule. You can then schedule their activities for the loan period. To assist you in scheduling, the application labels employee loans with the originating store or department, loan duration, and start and end times; and adds the person to the Employee Maintenance module (view only). While planning your schedule and clearing alerts, you can refer to this employee information, such as the person's availability and break rules.

To schedule an employee loaned to your department or store:

1. Click the Weekly Schedule or Daily Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab

2. On the application bar, click  and select a team.
3. In Weekly Schedule, choose the type of display: View by Work Hours or View by Activities.
4. In the Team Weekly Schedule or Team Daily Schedule table, double-click the cell in which you want to schedule or edit an activity.

   A dialog box opens. Perform the usual steps to manually schedule an employee's time.

   See: Scheduling and Editing Employee Activities

   When you check the schedule, the application performs the standard checks to ensure that the employee's start and end time, and the shift duration follow the loaned employee's scheduling rules.

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

Submitting a Schedule for Optimization

After running a Pre-Scheduling Check in the Check step, you can proceed to the Schedule step, where you can:

- Schedule activities for specific employees using the weekly schedule and then submit your schedule for optimization, if weekly scheduling is enabled.
- Schedule work weeks or absence weeks for specific employes using the long term schedule, if long term scheduling is enabled
- Re-optimize an already existing schedule by rescheduling
- Submit the schedule

The procedure is the same. The following procedure provides a general framework for schedule optimization.

To submit a schedule for optimization:

1. Open the Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab
   Long Term Process > Schedule step > Long Term Schedule

2. At the bottom of the page, click Create Schedule.

   OWS places your schedule optimization request in a queue. You can view its status at the top of the page. Depending on your system and configuration, optimization may take some time.

3. When schedule optimization is complete:
   - If there are no red alerts, and you do not wish to schedule any more activities, click Confirm and Proceed button to go to the Post step. You have completed this procedure.
   - If necessary, schedule other activities in the Team Weekly Schedule or Team Daily Schedule tables.
     See Scheduling and Editing Employee Activities
   - If necessary, lock the work hours for certain employees to avoid creating schedules for them again.
     See Locking Employee Work Schedules
   - If the schedule optimization generated red alerts, find their causes by clicking on the step names in My Issues, then resolve them. Resolving yellow alerts is optional.
4. If schedule optimization generated critical (red) alerts, or if you scheduled more activities after optimization, there are three options:
   - If you made a few minor changes to the optimized schedule and want to incorporate these changes, but not re-optimize the entire schedule, click Check Schedule. OWS does not re-optimize the schedule; it checks the schedule and generates critical alerts if it detects conflicts in employee data.

- If you made a number of changes and want OWS to generate a new, completely optimized schedule that incorporates your changes, click Create Schedule. The schedule is once again submitted for optimization. In this case, OWS does not consider the global policies defined in the OWS Designer, when creating the schedule again.
- If you made a number of changes and want OWS to comply with the global policies defined in the OWS Designer when generating a new, completely optimized schedule, click Reschedule. The schedule is once again submitted for optimization.

5. If there are no more critical alerts, and you do not wish to schedule any more activities, click Confirm and Proceed button to continue to the Post step.

   Note: If you make changes to the schedule and click directly on Confirm and Proceed, OWS does not check your changes or generate alerts. However, OWS will update the KPIs, which you can view in the Post step.

See:
Daily Schedule
Post Schedule
Pre-Scheduling Check
Scheduling and Editing Employee Activities
Viewing Individual Schedules
Fixing Employee Work Hours

Using Filters

As you work with schedules, you may find it convenient to filter the view based on criteria that reduces the list to fewer entries. The application provides predefined filters based on the activities defined at setup. For example, you can filter the schedule to identify employees who are absent, on loan, or who have the day off.

You can also create customized filters, for example, to view those employees whose shift begins at a specific time. The parameters you enter when defining a filter are different on the long term, weekly, and daily schedules, so the filter you create applies to the long term, weekly, or daily schedule. (It does not carry-over.)

The filters are associated with your login. After you create a filter, you can re-use it the next time you log on to the application.

To create a filter:

1. Click  to open the Filter(s) dialog box.
2. Click the  icon on the Filter(s) dialog box.

   The New/Modify Filter box displays.
3. In the Name field, specify a criterion:
   - Select a column name from the list
   - Select an expression from the list.
   - Enter a value in the last field (you can use * to represent all values) or select a value from the list (if available).

   Tip: For navigating you can use the tab keys. Use the arrow keys in a field to scroll through the options or to change the amount of time, such as the number of hours for a WD.
4. If you want to add a second criterion, select the Operator box, choose an operator (AND or OR), and enter a criterion on the second line.
5. Click OK.
6. The filter is shown in the Filter(s) dialog box.

   You can define as many filters as you want. Activate the filters you require.

To activate/deactivate a filter:

1. Click  to open the Filter(s) dialog box.
2. To activate a filter, select its corresponding boxes.
3. If you check several boxes, OWS combines the filters.
4. To deactivate a filter, deselect the corresponding box.

5. Click OK.

   The filtered results appear in the table.

To delete a filter:

1. Click  to open the Filter(s) dialog box.
2. Select the line of the filter you want to delete.
3. Click  .

   The filter is deleted.
4. Click OK to return to the table.

Finding a Replacement

When planning or checking your schedule, you may need to make adjustments, such as transferring a work shift from an employee who cannot work that shift to someone else. For example, if an employee requests a personal leave, you can cover that person's shift by finding someone to replace the employee.

Using the find replacement feature, you can search for a replacement based on skills and available hours. When you select the replacement, the application automatically transfers the work shift to that person. You can then make the necessary adjustments for the employee you have replaced, such as entering an absence, scheduling the person for a different shift, or loaning the person to another store.

To find a replacement:

1. Click the Weekly Schedule or Daily Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab

2. Click  and select a team.
3. In the Schedule, choose the type of display: View by Work Hours or View by Activities.
4. You can replace someone for a day or for an activity. To replace someone for a:
   - Day: Display Weekly Schedule (View by Hours). Right-click on the cell.
   - Shift: Display Weekly Schedule (View by Activities) or the Daily Schedule. Right-click on the cell.
5. In the Find Replacement dialog, specify search criteria to restrict the list:
   - Check Availability: Lists employees whose available hours correspond to the person' you are replacing
   - Check Skills: Lists employees who have similar skills

   The application displays a list of potential replacements. The list includes employees who have the day off or who are not scheduled for work that day or shift. On the daily schedule, the application also lists those employees who are working, but who are scheduled for other shifts. Both the weekly and daily schedule lists exclude employees who are absent or who have a fixed schedule. If the list does not include enough candidates, you can widen the search by de-selecting the appropriate Availability and Skills options.

   Change the sort order by clicking a column heading. Click the same column heading again to change the order from ascending to descending.

   Note: You cannot use the find replacement feature to identify a substitute for shifts where the import process has scheduled the employee's time as absent, on loan, or assigned a special fixed activity. These shifts are view-only.
6. Click Replace to:

- Transfer the work day or shift to the replacement. (Transferring the replacement deletes any previously schedule for the same time slot.)
- Delete the work day or shift of the person being replaced.

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

You can then make the necessary adjustments for the employee you have replaced, such as entering an absence, scheduling the person for a different shift, or loaning the person to another store.

Clearing the Schedule

If you want to revert any changes you made to the schedule during the planning process, you can clear the existing information, and this will undo all your changes, with the exception of:

- Long term schedule: absences (including part-day absences)
- Weekly and daily schedule: absences (including part-day absences), daily and hourly loans and special fixed activities

You can clear the long term, weekly, or daily schedule for the team.

To clear the long term team schedule:

1. Open the Long Term Schedule page:

   Long Term Process > Schedule step >Long Term Schedule
2. Click  and select a team.
3. Choose Clear Schedule from the Team Long Term Schedule menu 
4. On the application bar, click  to save your changes and clear the schedule. (In the Save dialog, choose Cancel, if you want to restore the schedule rather than proceed with clearing it.)
5. Follow the usual steps to create a new schedule to replace the one you cleared.

To clear the weekly team schedule:

1. Open the Weekly Schedule page:

   Weekly Process > Schedule step >Weekly Schedule
2. Click  and select a team.
3. Choose Clear Schedule from the Team Weekly Schedule menu 
4. On the application bar, click  to save your changes and clear the schedule. (In the Save dialog, choose Cancel, if you want to restore the schedule rather than proceed with clearing it.)
5. Follow the usual steps to create a new schedule to replace the one you cleared.

To clear the daily team schedule:

1. Open the Weekly Schedule page:

   Weekly Process > Schedule step >Daily Schedule
2. Click  and select a team.
3. Click the column heading of the day you want to remove the scheduling information.

4. Choose Clear Schedule from the Team Daily Schedule menu 
5. On the application bar, click  to save your changes and clear the schedule. In the Save dialog, choose Cancel, if you want to restore the schedule rather than proceed with clearing it.)
6. Follow the usual steps to create a new schedule to replace the one you cleared.

See:
Weekly Schedule
Daily Schedule

Rescheduling Using Actual Hours

OWS is designed to optimize the resources and workload to create a schedule. As the year progresses, you may find that the planned and actual hours vary due to changes in the business, staffing requirements, and other factors. You can reschedule so that the actual hours worked to-date are reflected in the schedule and taken into account when OWS optimizes the projected schedule for the remaining week. When the actual hours are imported, OWS also updates information such as the weekly KPIs and the scheduled and accumulated hours on the Schedule Variance tab, so that you can review and, if required, adjust employee schedules.

In the Weekly Process, when you reschedule after importing actual hours, OWS automatically optimizes the weekly schedule. In the Long Term Process, you launch a process to use the imported actual hours. OWS uses the actual hours to display the actual week types on the Actual Hours page, and then when you reschedule, OWS uses the actual hours when recalculating the long term schedule.

To reschedule using Actual Hours:

1. Open the Long Term Schedule page:

   Long Term Process > Schedule step >Long Term Schedule
2. Click  and select a team.
3. Click the Actual Hours link to display that page.
4. Click the Actual Hours Validation button to have OWS:
   - Recalculate the actual hours based on the imported information and display the revised hours in the Actual Hours Review
   - Recalculate the week types and display the revised week types on the Actual Long Term Schedule
5. Click the Long Term Schedule link to return to the long term schedule page.
6. On the application bar, click  to save your changes.
7. Click the Reschedule button to have OWS generate an optimized schedule using the actual week types.
8. On the application bar, click  to save your changes.

Viewing Schedule Variance

Use the Team Long Term, Weekly, and Daily Schedules to view the work weeks and work hours of each employee.

To view an individual schedule:

1. Click the Schedule tab:

   Weekly Process > Schedule step > Weekly Schedule or Daily Schedule tab
   Long Term Process > Schedule step > Long Term Schedule tab
2. Select the Individual Schedule tab.
3. Select the employee in the team schedule to see details for that person in the Individual Schedule:
   - **Availability**: Total hours the employee is available to work on the selected day.
   - **Preferred**: Employee's preferred hours.
   - **Fixed**: Hours the employee must work within a specific time range on that day.
   - **Scheduled**: Total hours the employee is scheduled to work on that day.
   - **Activity**: Total scheduled hours, broken down by activity.

Note: Scheduled and Activity only contain information if you have generated the schedule.

Post

POST SCHEDULE

The Post Schedule tab in Step 5: Post displays the Key Performance Indicators (KPIs) for the schedule.

Weekly Process

The Post Schedule tab displays the same daily KPIs as those displayed in the Schedule step. From this tab, you can display and print the schedule and complete the Weekly Process.

The KPIs for the Schedule Analysis is shown in the following table and apply to the entire store. To view your departmental KPIs, see: Dashboards Overview.

Demand Hours	Daily hour requirements in the Demand step. This is the same value as displayed on the Demand Hours line on the Demand Summary page when you have selected all the activities.
Scheduled Productive Hours	Total daily hours scheduled in the weekly schedule.
Demand Coverage %	Total daily hours scheduled divided by total daily hour requirements (Demand Hours).
Scheduled Productive Costs	Total daily cost of labor according to the weekly schedule.
Schedule Efficiency (%)	Daily measure of how well the workload has been covered. 100% corresponds to no over staffing or under staffing.

Long Term Process

The Post Schedule tab displays the same weekly KPIs as those displayed in the Schedule step. From this tab, you can display the initial and final posted schedule and complete long term process.

The KPIs for the Schedule Analysis is shown in the following table and apply to the entire store. To view your departmental KPIs, see: Dashboards Overview.

Demand Hours	Weekly hour requirements as defined in the Demand step. This is the same value as displayed on the Demand Summary line of the Demand Summary page, when you have all activities selected.
Scheduled Hours	Total weekly hours scheduled in the long term schedule (absences not included).
Demand Coverage (%)	Total weekly hours scheduled divided by total weekly hour requirements (Demand Hours).
Scheduled Costs	Scheduled worked hours per employee multiplied by the average pay rate of each employee.

See:
Demand Summary
Forecast Summary
Posted Schedule
Step 5: Post

INITIAL POSTED SCHEDULE

The Initial Posted Schedule tab in Step 5: Post displays the initial optimized schedule for the long term process. OWS maintains this version of the schedule until you replace it from the Post Schedule tab.

If staff changes become necessary, such as absences that require changes to the schedule, you can return to the Schedule step and make changes there without altering the initial posted schedule. You can refer to the initial posted schedule while modifying the current schedule.

If you make substantial revisions to your schedule, you can:

- Post an Initial Posted Schedule to replace the current one

  If you want the Posted Schedule to correspond to the initial posted schedule, you can re-post the schedule.

- Retain the Initial Posted Schedule to preserve that version

  If you want the Posted Schedule to display the most recent schedule changes, you can post the schedule. The Posted Schedule will display the most recent changes, and the Initial Posted Schedule will remain unchanged.

See:
Posting an Initial Schedule
Posting a Long Term Schedule

POSTED SCHEDULE

The Posted Schedule tab in Step 5: Post displays the final optimized schedule. The Posted Schedule page maintains this version of the schedule until you post a new version from the Post Schedule page. Sometimes staff changes become necessary, due to absences that require changes to the schedule or as a result of adjustments required by the actual hours versus the forecasted hours. You can return to the Schedule page and make changes there without altering the posted schedule or initial posted schedule (long term process). While making your changes, you can refer to the:

- Posted schedule (weekly process and long term process)
- Printed versions of the weekly and daily reports (weekly process). These reports remain in effect until you post your revised schedule from the Post Schedule page.

See:
Posting a Weekly Schedule
Posting a Long Term Schedule
Step 4: Schedule

How Tos

Posting a Weekly Schedule

The Posted Schedule tab in Step 5: Post displays the final optimized schedule. The Posted Schedule page maintains this version of the schedule until you post a new version from the Post Schedule page.

To post a schedule:

1. Go to the Post Schedule step:

   Weekly Process > Post step > Post Schedule

2. Click the Post Schedule button to create a final optimized schedule.

   Depending on your configuration, posting the schedule also exports it.

3. To produce a printed report in PDF format, click the View Daily Report to print the daily schedule; click the View Weekly Report button to print the weekly schedule.

4. To view the final schedule, click the Posted Schedule tab. The posted schedule remains in effect until you post a new schedule.

   The application displays the Team Weekly Schedule. From this page you can:

   - View individual schedules
   - View the schedule based on hours or on activities
   - Display the information using filters to restrict the information displayed

   OWS maintains this version of the Posted Schedule page. To revise the schedule, return to the Step 4: Schedule and modify the schedule there. (You can view but not change the posted version.) When you are ready to re-post the changes you have made, you follow the same steps to replace the existing Posted Schedule with your newly revised schedule.

Buttons	Description
View Weekly Report	Opens a weekly schedule report in PDF format for viewing or printing.
View Daily Report	Opens a daily schedule report in PDF format for viewing or printing.
Post Schedule	Copies the optimized schedule created in the Schedule step to the Posted Schedule page.

Posting an Initial Schedule

The Initial Posted Schedule displays the initial optimized schedule for the long term process. OWS maintains this version of the schedule until you replace it from the Post Schedule tab.

To post a schedule:

1. Go to the Post Schedule step:

   Long Term Process > Post step > Post Schedule

2. Click the Post Initial Schedule button to create an initial optimized schedule.

   Note: Depending on the settings you administrator defined during setup, clicking the Post Initial Schedule button posts only the initial schedule or simultaneously posts the Initial Schedule and the Posted Schedule.

3. To view the initial posted schedule, click the Initial Posted Schedule tab. The initial posted schedule remains in effect until you post a new version.

   The application displays the long term schedule. From this page you can:

   - View the team long term schedule
   - View individual schedules for the week
   - Display the information using the zoom icon and filters to restrict the information displayed

4. To re-post the initial posted schedule, follow the same steps described above (from the Post Schedule step click the Post Initial Schedule button).

Initial Posted Schedule Version

OWS retains the Initial Posted Schedule until you replace it with a different version. (You can view but not change the initial posted version.) After updating your schedule, you can:

- Post an Initial Posted Schedule to reflect your most recent schedule changes

  When you post a final schedule, the Initial and Posted Schedule will be the same.

- Retain the Initial Posted Schedule to preserve the original version

  When you post a final schedule, the Initial Posted Schedule displays the original version, but the final Posted Schedule displays the most recent schedule changes.

See:
Posting a Long Term Schedule
Long Term Schedule

Posting a Long Term Schedule

The Posted Schedule tab in Step 5: Post displays the final optimized schedule. The Posted Schedule page maintains this version of the schedule until you post a new version from the Post Schedule page.

To post a schedule:

1. Go to the Post Schedule step:

   Long Term Process > Post step > Post Schedule

2. Click the Post Schedule button to create a final optimized schedule.

   Note: Depending on the settings you administrator defined during setup, clicking the Post Initial Schedule button posts only the initial schedule or simultaneously posts the Initial Schedule and the Posted Schedule

3. Click the Posted Schedule tab to view the schedule. The posted schedule remains in effect until you post a new version.

   The application displays the long term schedule. From this page you can:

- View the team long term schedule
- View individual schedules for the week
- Display the information using the zoom icon and filters to restrict the information displayed

See:
Posting an Initial Schedule
Long Term Schedule

Employee Maintenance

EMPLOYEE MAINTENANCE OVERVIEW

The Employee Maintenance module contains the tabs displayed here that enable you to view, edit, and create all types of employee information. OWS uses this information in the Check and Scheduling steps.

Scheduling Rules

From this tab, you can:

- View or modify rules and options for scheduling each employee.
- Select preferred and core activities.
- Specify proficiency levels.

Employee Information

From this tab, you can:

- View or modify employee details.
- Create new employees.
- Manage assignments and contracts.

Break Rules

From this tab, you can view information about the types of breaks employees are eligible for during their work shifts, based on their contracts. Depending on your access rights, you can edit details of employee shifts in this tab.

Availability

From this tab, you can view and modify the scheduled availability, preferred, and fixed hours of each employee. Additionally, you can add as many shifts as necessary to an employee's available hours.

Minor Rules

From this tab, you can view the work duration for employees who are minors. If required, you can edit a minor's work duration for a specific date.

Lending Employees

From this tab, you can lend employees to other stores and departments when they require additional resources to cover the workload. You can lend employees on an hourly or daily basis. The manager of the destination store (department) then schedules the allocated time.

Week Types

From this tab, if long term scheduling is enabled, you can view the minimum and maximum work durations for the week types associated to an employee's contract.

Constraints

From this tab, if long term scheduling is enabled, you can view the long term constraints (conditions) that the application uses when generating an optimized schedule, such as the long term and weekly contract duration.

Team Information

From this tab, you can:

- View absences for each employee.
- Schedule absences for each employee.

Check People Buttons

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

SCHEDULING RULES

The Scheduling Rules tab is located in the Employee Maintenance module and the Contracts module. Depending on the role assigned to your login, you can view the Scheduling Rules tab from one or both locations.

The Scheduling Rules tab displays the current scheduling rules and the activities that correspond to the employee's skill set. From this tab, you can modify the rules for scheduling employees and specify the skills and core skills.

Pay Information

The Pay Information table displays details of the pay type (Full Time or Part Time) and the pay rate of an employee. You can edit all parameters except Pay Type which you can change on the Employee Information tab with the Manage Contracts link.

Scheduling Rules and Options

The Scheduling Rules and Options provide the basic guidelines for scheduling each employee. Guidelines include parameters such as minimum work hours per week and per day, the maximum late nights that an employee can work, and the late night time limit. You can manually change the default parameters defined during configuration.

Employee Skills

OWS uses the skill parameters you select for an employee when it generates the optimized schedule. You can add or remove skills for each employee.

OWS also takes into consideration the order of skill level and the employee's proficiency when generating a schedule. The proficiency level ensures that if there are several employees for a given activity with the same skills. OWS schedules the employees with the highest level of proficiency during the daily business peaks.

Employee Core

OWS uses the core activities you select for an employee when it generates an optimized schedule. You can add or remove core activities for each employee. Core activities are different from other activities in that they do not actually appear in the Demand Summary tab or in the optimized weekly schedule.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees.

If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step. The Employee Alerts icon displays any alerts and their severity level. Click the Employee Alerts link to view the Issues list.

See:
Editing Core Activities
Editing Preferred Skills
Employee Maintenance Overview
Viewing Employee Scheduling Rules and Activities

EMPLOYEE INFORMATION

The Employee Information tab is located in the Employee Maintenance module. It displays an employee's address, contact details, options, and additional information. From this tab, you can create new employees, and manage their assignments and contracts.

Employee Address and Employee Contact

At setup, the administrator determines which fields can be edited, which are read-only, and which are mandatory.

Employee Options

The two employee options include Export schedule hours by department, and Minor Rules Apply.

If the Export Schedule Hours By Department option is selected for an employee, OWS exports schedule hours by departments when the export process is run. If this option is not selected, OWS exports schedule hours at the employee level.

If an employee is a minor, the Minor Rules Apply option is selected. OWS considers the labor rules for employing minors as additional constraints apart from contract constraints while optimizing an employee's schedule.

Additional Information

You can view additional information for each employee, such as his marital status.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

Employee Alerts

When you click Check People, OWS may generate alerts. The Employee Alerts icon displays any alerts and the highest severity level. Click the Employee Alerts link to view the Issues list (the Employee Alerts link displays only if OWS generated an alert).

Link	Description
Create new employee	Creates a new employee record.
Manage	Assigns an employee to multiple departments.

assignments	
Manage contracts	Adds a new contract to an employee.

See:
Manage Assignments
Manage Contracts
Create an Employee Record
Employee Maintenance Overview
Viewing Personal Employee Information

BREAK RULES

The Break Rules tab is located in the Employee Maintenance module and the Contracts module. Depending on the role assigned to your login, you can view the Break Rules tab from one or both locations.

During setup, the administrator defines day compositions, the sequence of work hours and breaks that represent the different contracts. By reviewing the break rules page, you can determine which break and shift arrangements apply to the employee. For example, the week day and weekend shifts may have the same maximum duration for the meal break, but have different start and end times.

Note: If there are no breaks scheduled for a work day of an employee, then only shift details display in the Work alone table.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees.

If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step. The Employee Alerts icon shows any generated alerts and their severity level. Click the Employee Alerts link to view the Issues list.

See:
Editing Employee Break Details
Employee Maintenance Overview
Pre-Scheduling Check
Viewing Employee Break Details

AVAILABILITY

The Availability tab is located in the Employee Maintenance module. From this tab, you can view, create, and edit the employee hours of each employee. If required, you can also add several shifts to an employee's available hours.

Employee Availabilities

The Employee Availabilities table displays three types of employee hours:

- **Availability**: Total hours the employee is available to work on the selected day.
- **Preferred**: Employee's preferred hours
- **Fixed**: Hours the employee must work within a specific time range on that day

Edit Rotation Availabilities

To create employee hours, you must first create cycles and week types for each employee, using the Edit rotation availabilities link. A cycle is a period during which one or more week types occur according to a specific rotation.

For example: A cycle may consist of weeks A, B, and C, which occur according to the following 4-week rotation:
week A + week B + week A + week C
This rotation repeats itself until the cycle ends.

A rotation can also consist of a single week that repeats throughout the cycle.

Each cycle and each week type is given a name. Define the cycle period by entering Start and End dates. Assign one or more week types to the cycle rotation. You can then create or edit a week type by entering Available, Preferred, and Fixed hours for each day of the week.

Remember that cycles and week types are specific to each employee. To use the same cycle or week type for a different employee, you must recreate it for that employee.

You can make exceptional changes to employee hours by directly editing the values in the Employee Availabilities table.

Edit Week Availabilities

Define shifts that are split into predefined time intervals, and span one working day. These shifts can be defined for an employee's available hours of work.

You can define or update the rotation shifts for an employee's available hours, by specifying the duration of the available, preferred, and fixed hours of the shift, in the Availability Info table.(To view the Availability Info table, click the Edit Week Availabilities link.) Once defined, these shifts display in the Employee Availabilities table.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

Employee Alerts

When you click Check People, OWS may generate alerts. The Employee Alerts icon displays any alerts and their highest severity level. Click the Employee Alerts link to view the Issues list (the Employee Alerts link displays only if OWS generated an alert).

Link	Description
Edit week availabilities	Allows you to add or update rotation shifts for an employee's available hours, and specify the duration of the available, preferred, and fixed hours of a shift.
Editing rotation availabilities	Allows you to create and edit employee hours by creating and editing the cycles, rotations, and week types.

See:
Managing Employee Hours
Deleting Exceptional Changes to Employee Hours
Employee Maintenance Overview
Making Exceptional Changes to Employee Hours
Adding Shifts to Employee Available Hours

MINOR RULES

The Minor Rules tab displays the weekly and daily work duration of employees who are minors. It is part of the Employee Maintenance module. The labor rules for employing minors (according to the official US state laws) have an impact on the following scheduling rules:

- Maximum number of working days.
- Maximum daily duration.
- Maximum weekly duration.

From the Minor Rules tab, you can view the maximum number of days a minor is allowed to work for each week and the daily and weekly work duration. If necessary, you can edit these work duration values for specific dates. While optimizing schedules, OWS considers the labor rules for minors as additional constraints apart from employee contracts.

Note: No values appear, if the employee is not a minor.

Weekly Rules

Weekly Rules displays the maximum number of hours and days the minor is allowed to work in a week.

Daily Rules

Daily Rules displays the maximum number of hours the minor is allowed to work each day of the week.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly) and Check People (long term), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

Employee Alerts

When you click Check People, OWS may generate alerts. The Employee Alerts icon displays any alerts and their highest severity level. Click the Employee Alerts link to view the Issues list (the Employee Alerts link displays only if OWS generated an alert)

See:
Viewing Work Duration for Minors
Editing Work Duration for Minors

LENDING EMPLOYEES

You can efficiently use your labor force by lending employees to other stores and departments required to cover the workload; for example, to increase coverage during the peak period of a promotional event.

You can lend employees on an hourly or daily basis. When you lend an employee, the application accounts for absences and special fixed activities so that employees are not lent to other stores during those times. The manager of the destination store (department) then schedules the allocated time.

The weekly schedule and employee maintenance modules display loan information, so you can easily identify employees you loaned to stores or who are on loan to you on an hourly or daily basis. You can manage employee loans, scheduling them in advance, or when needed, cancel the loan if the destination store no longer requires the additional help. The application maintains a history by employee of each loan.

To assist you in scheduling a borrowed employee, the application adds that person to the Employee Maintenance module (view only). You can then refer to the employee information, such as an employee's break rules or availability, when adjusting a schedule or responding to alerts.

Using the same process, a regional or district manager can similarly lend an employee to a store within the manager's region or district.

See:
Team Information
Lending Employees to Another Department or Store
Scheduling Employees On Loan to You

CONSTRAINTS

The Constraints tab is located in the Employee Maintenance module and the Contracts module. Depending on the role assigned to your login, you can view the Constraints tab from one or both locations.

The Constraints tab displays conditions that OWS applies when generating an optimized long term schedule. For example, OWS performs schedule optimization by matching the requirements from the Demand step against constraints, such as the long term contract duration. You can use this page to review the work duration and team constraints defined during set up, and to change the values for these constraints as needed. When you change the values in the:

- Contracts module, your changes apply to all employees who have that constraint as part of their contract.
- Employee Maintenance module, your changes apply to the individual employee who has that constraint as part of his or her contract.

Work Constraints

The work duration information takes into account the projected paid and unpaid absence durations.

- Weekly contract duration: The number of contractual hours the employee can work in a week.
- Yearly contract duration: The number of contractual hours the employee can work in a year

  The long term contract duration is often defined as the weekly contractual duration multiplied by the number of weeks (52 or 53).
- Average work duration: The mean weekly work duration for the employee

  OWS calculates the mean weekly work duration based on the minimum and maximum weekly work duration within a specified period of time.
- Week types constraint: The minimum or maximum number of weeks a specific week type can occur within a period of time
- Week sequence: The number of consecutive weeks a week type repeats within a time period. You can specify a number that limits the consecutive week sequence, or sets a minimum number that OWS can exceed when scheduling the remaining week types in the month.

  For example, if you have 3 week types (high, medium, low demand), the configuration might specify that the medium demand week occur:

  - No more than 2 consecutive times in the month. OWS would schedule the week following the sequence with a low or high week, depending on the forecasted workload and the employees contract terms.
  - At least 2 consecutive times in a month. OWS would schedule the following week as medium, low, or high, depending on the forecasted workload, and the employee's contract terms.

Team Constraints

The application uses the team constraints to allocate the work fairly among the employees. In equalizing the workload, the application takes into account the week composition and work duration.

Other Constraints

Other long term and weekly constraints are managed in the remaining employee maintenance pages where you can override the values, if required; for example:

- Scheduling rules displays constraints that you can override for an individual employee, such as the yearly and weekly contract duration and the rule governing whether a specific employee works on bank holidays
- Week Types displays the work durations for the week types associated to an employee's contract
- Break rules displays contract variables of day compositions (the sequence of work hours and breaks that represent the different contracts)
- Minor Rules displays labor rules for employing minors
- Availability displays fixed, preferred, and available hours

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

See: Viewing and Modifying Constraints

WEEK TYPES

The Week Types tab is located in the Employee Maintenance module and the Contracts module. Depending on the setup defined by your administrator, you can view the Week Types tab from one or both locations. The employee's contract determines which week types are listed. You can use this page to review the minimum and maximum number of work hours defined during set up, and to change these values, as required. When you change the values in the:

- Contracts module, your changes apply to all employees who have that week type as part of their contract.
- Employee Maintenance module, your changes apply to the individual employee who has that week type as part of his or her contract.

Note: The week types displayed in the Utilities module are the work weeks used to generate the data in the Forecast and Demand steps; the week types displayed in employee maintenance and contract modules are the work week types associated to the employee's contract and are used to generate an individual's schedule.

Work Durations

OWS uses the week types as one of the components in calculating the employee's schedule. The application takes into account the rules about week types, such as how many times the week type can or cannot occur within a specific period, and which employees have contracts that include that week type. As an example, the configuration might specify that high-volume week types apply to full-time employees, but not to part-time employees. If the workload required a high volume week, the application would schedule only full-time employees

The work durations defined during configuration apply to all employees whose contracts include the week types. You can manually change the default work durations for an individual employee. To accommodate individual contracts, you can enter minimum and maximum work durations specific to the employee in the Scheduling Rules and OWS will use these values when optimizing the schedule for the employee.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

See:
Employee Maintenance Overview
Viewing and Modifying Week Types
Scheduling Daily Absences (long term process)
Scheduling the Week Type (long term process)

TEAM INFORMATION

The Team Information tab is located in the Employee Maintenance module. From this tab, you can view and schedule absences for individual employees. Absences can include days off, sick leave, and vacation.

Team Information

Displays the days each employee is absent in the team selected. This table allows you to view and schedule employee absences. Click to choose the table display options and click to filter the data.

Detailed Information

This table shows individual employee hours and the employee's schedule and activities for the day selected. You display the day and employee by clicking the appropriate cell in the Team Information table.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

Employee Alerts

When you click Check People, OWS may generate alerts. The Employee Alerts icon displays any alerts and their highest severity level. Click the Employee Alerts link to view the Issues list (the Employee Alerts link displays only if OWS generated an alert).

Hide Detail / Show Detail

With these options, you can hide or show the Detailed Information table. Hiding them leaves more space for viewing the Team Information table.

Zoom

You can use the zoom icon to display the data within a specific period of time. Click the zoom icon and then choose the time period for viewing the information displayed on the page, such as quarter, month, week. The zoom views are defined during configuration by your administrator.

See:
Scheduling Absences
Viewing Detailed Employee Information
Viewing Absences

How Tos

Viewing Employee Scheduling Rules and Skills

The Scheduling Rules tab allows you to view the scheduling rules and options, and the skills and core skills of each employee. Scheduling rules are based on the content of the employment contract. You can edit all parameters except Pay Type which you can change on the Employee Information tab with the Manage Contracts link.

To view employee scheduling rules and preferred activities:

1. Click the Scheduling Rules tab:

   Employee Maintenance > Scheduling Rules

2. Click  to select an employee.

   OWS displays the employee's scheduling rules and options, and the person's skills and core skills.

See:
Manage Contracts
Employee Maintenance Overview
Scheduling Rules

Editing Preferred Skills

Using the Scheduling Rules tab, you can define or change the skills and proficiency level of an employee. Skills are arranged in order of preference. When generating the schedule, OWS takes preferences and proficiencies into account.

To edit the preferred skills of an employee:

1. Click the Scheduling Rules tab:

   Employee Maintenance > Scheduling Rules

2. Click  to select an employee.
3. In the Employee Preferred Skills box, select a skill and click Add to move it to the Selected Skills list.

   You can select several skills by holding down the Ctrl key.

   Note: Click Remove to remove selected skills from the Selected Skills list.
4. Click Up or Down to change the priority order of the selected skills.
   OWS follows this order when generating a schedule.
5. In the Proficiency field, enter a value for the employee's proficiency level for the selected skill, and click OK.

   The value appears next to the skill in the Selected Skills list. Some skills do not use proficiency levels. In these cases, a grayed out 0 appears in the Proficiency field. The proficiency unit for a given skill is the same for all employees.
6. On the application bar, click  to save your changes.

See:
Employee Maintenance Overview
Scheduling Rules

Editing Core Activities

From the Scheduling Rules tab, you can define or change the core activities of an employee. Unlike regular activities, there is no order of preference for core activities.

To edit the core activities of an employee:

1. Open the Employee Core Activities table:

   Employee Maintenance > Scheduling Rules tab

2. Click  to select an employee.
3. In the Employee Core box, select an activity and click Add to move it to the Selected Core Activity list.

   You can select several core activities by holding down the Ctrl key.

   Note: Click Remove to remove selected core activities from the Employee Core box.

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

See:
Employee Maintenance Overview
Scheduling Rules

Viewing and Modifying Personal Employee Information

From the Employee Information tab, you can view the address, contact details, options, and additional information for each employee.

To view personal employee information:

1. Click the Employee Information tab:

   Employee Maintenance > Employee Information

2. Click  to select an employee.

   The employee's information displays.

To modify personal employee information:

1. Display the employee information, according to the previous procedure.
2. Modify the fields you want to (you cannot modify the grayed out fields).
3. On the application bar, click  to save your changes.

See:
Employee Information
Employee Maintenance Overview

Create an Employee Record

When you hire a new employee, you must define the employee in the OWS database. There are two ways to create employee definitions:

- Import the employee data directly.
- Create the employee manually.

The procedure you use depends on how the administrator configured the application at setup. The following procedure describes how to create an employee record manually. There are three steps to the process.

Getting Started:

1. Click the Employee Information tab:

   Employee Maintenance > Employee Information tab
2. Click Create new employee.

   The New Employee table displays.

   Note: If you are importing employees directly, the Create new employee link does not appear.
3. Enter the employee's details, such as name, date of birth, HR ID, the Social security number, and the hiring date of the employee.
4. Select either Full Time or Part Time as the pay type for the employee.
5. Assign start and end dates to the employee's employment contract, and then click Create new employee.
6. Click Back.

   The new employee record displays in the Select Employee list  .

Employee Address, Employee Contact, Employee Options, and Additional Information:

1. On the application bar, click  and select the employee record you created.
2. Enter the requisite information in the Employee Address, Employee Contact, Employee Options, and Additional Information tables.
3. On the application bar, click  to save your changes.

See:
Manage Assignments
Manage Contracts
Break Rules
Employee Information
Employee Maintenance Overview

Manage Assignments

You can assign an employee to multiple departments, for periods that you specify.

To view employee assignments:

1. Click the Employee Information tab:

   Employee Maintenance > Employee Information
2. On the application bar, click  to select a team.
3. Click Manage Assignments to display the Employee Filtered Search table.
4. Search for an employee based on search criteria such as, Name, Social Security Number, HR ID or Badge details.
5. Click Search.

   The employees matching the criteria provided displays in the Select Employees list.
6. Select an employee in the Select Employees list to display the Assignments table.

   This displays the existing assignments for the current employee.

To change an employee assignment:

1. From the Assignments table, select the assignment that you want to modify for an employee.
2. From the  list, select a node from which the assignment is valid.

   Note: If a modified assignment period overlaps with one or more existing assignment periods, the modified period overwrites the existing period(s).
3. If necessary,click the Start Date and End Date fields to change the assignment period. You can select infinity by checking the ∞ boxes.
4. On the application bar, click  to save your changes.

To create a new assignment:

1. Click  in the Assignments table.

   The Create a Range Dialog box displays where you can enter the assignment period.
2. Click the Start Date and End Date fields to change the assignment period.

   You can select infinity by checking the -oo or +oo boxes.
3. Select an assignment from the  list.

   Note: If a new assignment period overlaps one or more existing assignment periods, the new period overwrites the existing period(s).

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

See:
Employee Information
Employee Maintenance Overview

Manage Contracts

You can define the characteristics of an employment contract. The type of contract can evolve over time.

To manage employment contracts:

1. Click the Employee Information tab:

   Employee Maintenance > Employee Information
2. On the application bar, click  to select the team of the employee.
3. Click  to select an employee from the Select Employee list.
4. Click Manage Contracts.

   The New Contract table for the current employee displays.
5. Select Full Time or Part Time as the Pay Type.
6. Select the dates from the Assigned from and Assigned to fields to specify the contract period.

   You can click  to choose dates from the calendar. You can choose infinity by selecting the -oo or +oo boxes.
7. On the application bar, click  to save your changes.

See:
Employee Information
Employee Maintenance Overview

Managing Employee Hours

To create or edit employee hours, generally you create cycles and week types for the employee. The week types are then ordered in the cycle according to a rotation. You can jump between steps, but it is recommended that you follow the entire procedure the first time you use this process.

To display employee hours:

1. Click Employee Maintenance.
2. Click the Availability tab.
3. On the application bar, select a date, and then click  to select a team.
4. Click  to select an employee.

5. The Employee Availabilities table displays the hours for the selected employee:
   - **Availability**: Total hours the employee is available to work on the selected day
   - **Preferred**: Employee's preferred work hours
   - **Fixed**: Hours the employee must work within a specific time range on that day

See: Availability

To edit an employee cycle (edit the permanent availabilities:

1. In the Availability tab, click Edit Rotation Availabilities.

   The Availability History table opens, displaying existing cycles for the selected employee
   - **Cycle Name**: Name used to identify the cycle.
   - **Start Date**: Date the cycle begins
   - **End Date**: Date the cycle ends
   - **Weeks in Cycle**: Number of weeks making up the rotation that repeats within the cycle. For example, if the rotation consists of week A + week B + week A + week C, enter 4 in this field.
   - **Actions**: Delete is used to erase a cycle.
2. If required, edit the following options in the Availability History table:
   - To change the Start Date or End Date, click directly in the field.
   - **Note**: If the new dates you choose overlap with one or more existing cycles, the new cycle overwrites the existing cycles. You may have to rename any existing cycles that you modify during this process.
   - To change the number of weeks in the rotation, click directly in the Weeks in Cycle field.
   - To erase a cycle, click Delete on the line of that cycle.

3. Click Next.

   Note: You can also create cycles in this page. In that case, first create a new employee cycle, then click Next.

To create a new employee cycle:

1. In the Availability History table, click  .

   The Create a Range dialog box opens.

2. Click Start Date and End Date to enter the dates the cycle starts and ends.

   Click  to choose dates from the calendar. You can select infinity by checking the -oo or +oo boxes.

3. Click OK to return to the Availability History table.

   This table contains a new line with the cycle you created. The Cycle Name field is empty.

4. Enter the name of the new cycle in the Cycle Name field.
5. To change the number of weeks in the rotation, edit the Weeks in Cycle field.

   The default value is 1.

6. Click Next to go to the next step and define the rotation.

To define a rotation:

Once you have edited or created an employee cycle, you must specify the weeks that make up this cycle and order them according to a rotation:

1. In the line for Week 1, use the Week Type list to select the first week of the rotation.

   Note: To choose an existing week, select it in the menu.

   To choose a new week, select New Week Type and enter a name in the New Type Name field.

2. Repeat step 1 for each line in the table, with Week 2 being the second week in the rotation, Week 3 the third week, and so on.

   You must enter each week type as many times as it occurs in the rotation, and in the correct order. If the rotation consists of only one week, the table should have only one line.

3. When you have completed all the lines, click Next to continue.
4. Click Finish once you have completed editing or creating the employee cycle.

To define or edit the weeks in a rotation:

Once you have defined the rotation that makes up the employee cycle, you must define or edit the employee hours for each week in the rotation:

1. Click Edit Week Availabilities.

   The Availability Info table displays.

2. For each day of the Availability Info table, provide a start and end time for each type of employee hour:
   - **Availabilities**: Total hours the employee is available to work on the selected day.
   - **Preferences**: Employee's preferred hours of work.
   - **Fixed hours**: Minimum hours the employee is required to work that day.
3. To disable employee hours for each day of the week:
   - If the employee does not work on a given day, do not select the On check box for that day's availabilities
   - If the employee does not have preferred hours, do not select the On check box for that day's preferences.
   - If the employee does not have fixed hours, do not select the On check box for that day's fixed hours
4. When you have entered the start and end times for the employee hours, click Back.

   The Employee Availabilities table displays the employee's hours.

   Note: If there are several weeks in the current cycle, select the next week from the Availability Info list, and provide the start and end time for each type of employee hour.

See:
Adding Shifts to Employee Available Hours

Adding Shifts to Employee Available Hours

From the Edit Week Availabilities link, you can add or update the rotation shifts for an employee's available hours, and specify the duration of the available, preferred, and fixed hours of the shift. Once defined, these split shifts display on the Employee Availabilities table.

T**o add shifts to employee available hours**:

1. Click the Availability tab:

   Employee Maintenance > Availability
2. On the application bar, select a date, and then click  to select a team.
3. Click  to select an employee.

   The Employee Availabilities table displays the employee hours for the selected employee.
4. Click Edit Week Availabilities.

   The Availability Info table displays.
5. Click  to add a shift.

   The three types of employee hours display for each day, in the Availability Info table.
6. Select the Availabilities check box for a date, and provide the start and end time for each available shift of the employee.

   Note: Each available shift can include either a fixed or preferred shift, or both.
7. On the application bar, click  to save your changes.

To update rotation shifts:

1. Click the Availability tab:

   Employee Maintenance > Availability
2. On the application bar, select a date, and then click  to select a team.
3. Click  to select an employee.

   The Employee Availabilities table displays the employee hours for the selected employee.
4. Click Edit Week Availabilities.

   The Availability Info table displays.

5. Click the cell of the day and type of shift you want to modify, and update the timings.
6. On the application bar, click  to save your changes.

See:
Availability

Making Exceptional Changes to Employee Availability

Through the Employee Availabilities table in the Availability tab, you can make changes to employee hours that override their existing cyclic values. Changes you make in the Employee Availabilities table are not cyclic. They only affect the day on which you made them.

To make an exceptional change to employee hours:

1. Click the Availability tab:

   Employee Maintenance > Availability
2. On the application bar, click  to select a team.
3. Click  to select an employee.
4. Double-click the cell of the day and type of hour you want to modify.

   A dialog box opens. You can modify Availability, Preferred, or Fixed hours.
5. Change the hours, and click Update.

   The new hours are shown at the top of the dialog box.
6. Click OK.

   The modified hours display in the Employee Availabilities table

See:
Availability
Employee Maintenance Overview

Deleting Exceptional Changes to Employee Hours

Through the Employee Availabilities table in the Availability tab, you can delete exceptional changes to employee hours.

To delete an exceptional change to employee hours:

1. Click the Availability tab:

   Employee Maintenance > Availability
2. On the application bar, click  to select a team.
3. Click  to select an employee.
4. Double-click the cell of the exceptional change that you want to delete.

   A dialog box opens. You can delete exceptional changes for Availability, Preferred, or Fixed hours.
5. In the Oracle - Web Page Dialog box, click  on the line of the exceptional change you want to delete.
6. Click OK.

   The change displays in the Employee Availabilities table.

See:
Availability
Employee Maintenance Overview

Viewing Absences (Employee Maintenance)

From the Team Information tab, you can view employee absences. OWS includes these absences when optimizing the schedule.

Note: This is the same process as described in Step 3: Check. See: Pre-Scheduling Check.

To view an employee absence:

1. Click the Team Information tab:

   Employee Maintenance > Team Information

2. On the application bar, click  to select a team.

   The list of employees and their absences and available hours display for each day of the week.

3. If you have long term scheduling enabled, you can use the zoom icon to display the data within a specific period of time. Click  the zoom icon and then choose the filter you want to use for viewing the information displayed on the page, such as quarter, month, week. The filters are defined during configuration by your administrator.

See:
Employee Maintenance Overview
Team Information

Scheduling Absences (Employee Maintenance)

From the Team Information tab, you can schedule and edit employee absences. OWS includes these absences when optimizing the schedule.

To schedule an employee absence:

1. Click the Team Information tab:

   Employee Maintenance > Team Information

2. On the application bar, select a date, and then click  to select a team.
3. If you have long term scheduling enabled, you can use the zoom icon to display the data within a specific period of time. Click  the zoom icon and then choose the filter you want to use for viewing the information displayed on the page, such as quarter, month, week. The filters are defined during configuration by your administrator.
4. Double-click the cell you want to modify in the Team Information table.

   The Oracle Workforce Scheduling dialog box opens.

5. Click an absence type in the Details pane, such as Absence or Vacation.
6. Enter the Daily Duration for the absence and click Add.

   The type of absence appears in the top pane, with its color code.

   Note: The Daily Duration value must be equal to the Absence Allowance found in the Scheduling Rules.

7. (Optional) To delete an absence, select the absence in the Detail top pane and click  .
8. (Optional) If required, select a different type of absence.

   Note: Selecting a different type of absence will overwrite the existing absence.

9. Click OK to confirm.

   OWS updates the Team Information table.

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

See:
Employee Maintenance Overview
Team Information

Viewing Employee Break Details

Use the Break Rules tab to view an employee's break details for a work shift.

To view employee break details:

1. Click the Break Rules tab:

   Employee Maintenance > Break Rules

2. On the application bar, click  to select a team.
3. Click  to select an employee.

   The break details for the work shift display.

See:
Creating an Employee Record
Editing Employee Break Details
Break Rules
Employee Maintenance Overview

Editing Employee Break Details

Use the Break Rules tab to edit an employee's break details for a work shift.

To edit employee break details:

1. Click the Break Rules tab:

   Employee Maintenance > Break Rules
2. On the application bar, click  to select a team.
3. Click  to select an employee.
4. Select the appropriate cell, and modify the value.
5. On the application bar, click  to save your changes.

See:
Creating an Employee Record
Break Rules
Employee Maintenance Overview
Viewing Employee Break Details

Viewing Work Duration for Minors

Use the Minor Rules tab to view the maximum number of working days in a week, and the daily and weekly work durations for a minor.

To view the work duration for a minor:

1. Click the Minor Rules tab.

   Employee Maintenance > Minor Rules

2. Click  to select an employee.

   The weekly and daily work duration for the minor displays.

   Note: No values are displayed,if the employee is not a minor.

See:
Editing Work Duration for Minors
Minor Rules

Editing Work Duration for Minors

From the Minor Rules tab, you can edit the daily and the weekly work duration of minors, for specific dates. As an example, if the vacation dates for the school calendar have changed from a year ago, then you may want to edit the work duration values for a specific date.

To edit work duration for minors:

1. Click the Minor Rules tab:

   Employee Maintenance > Minor Rules

2. Click  to select an employee.

   The weekly and daily work duration for the minor displays.

   Note: No values are displayed,if the employee is not a minor.

3. Select the appropriate cell, and modify the value.

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

See:
Minor Rules

Lending Employees to Another Department or Store

You can fulfill staffing requirements in several stores or departments by lending staff on an hourly or daily basis. The application accounts for absences and special fixed activities, so that you do not schedule the loan during those times.

The manager of the destination store (or department) schedules the allocated time for the employee. On the schedule of the store that loans the employee, the application identifies the loan with the name of the destination store and loan duration. The posted schedule includes similar information about the loan.

After you create a loan, you can cancel it, if necessary. The application maintains a history of the previous occasions you lent the person, so that you can determine, for example, when you last lent a person to another location, and for how long.

To lend an employee to another department or store:

1. Click the Lending tab:

   Employee Maintenance> Lending

2. On the application bar, click  and select an employee from a team.
3. Select the type of loan:
   - Daily: Lends the employee for one or more days
   - Hourly: Lends the employee for a single working day or less

   Select an hourly loan to schedule the person's remaining time in the work day at the home store or to lend the person to another store for that time.
4. For an hourly loan, enter the start and end time to specify the time window for the loan.

   You can define start and end times beyond the loan duration. For example, you can schedule a start time of 7AM and an end time of 12PM, with a loan duration of 3 hours, which enables the destination manager to schedule the 3 hours shift at any time between 7 and 12.
5. If the end time of the loan falls into the next calendar day, click Next Day.
6. Select a destination store from the list of values.
7. If the destination store has more than one department, select a department in the destination store.

   When the confirmation message appears, you can refresh the page to view the loan entry listed in the History window.

   Note: After you create a loan, you cannot modify its details. Instead, cancel the loan, and create a new one.

To cancel an employee loan:

1. Click the Lending tab:

   Employee Maintenance> Lending

2. On the application bar, click  and select an employee from a team.
3. In the History window, select the loan you want to cancel.

- To sort the list by different criteria, click the column heading that corresponds to your sort criteria.
- To select more than one entry, click the down arrow next to the Select column heading.

See:
Lending Employees
Scheduling Employees On Loan to You

Viewing and Modifying Week Types

You can view and modify the work durations for the week types associated with the employee's contract.

To edit the work durations:

1. Click the Week Types tab:

   Employee Maintenance > Week Types tab

2. Click  to select an employee.
3. Manually edit a minimum or maximum value for the week type. Click the number to select it, and enter the new value.

   The color of the triangle changes to show that the default value has been changed.

4. Save your changes.

Viewing and Modifying Constraints

From the Constraints tab, you can view and modify the work duration and team constraints. The constraints are displayed for an employee contract and are based on the constraints set up during configuration.

To view constraint information:

1. Click the Employee Information tab:

   Employee Maintenance > Constraints

2. Click  to select an employee.

   The employee's information displays.

To modify constraints:

1. Display the employee information, according to the previous procedure.
2. Click the cells of the values you want to change, such as the minimum or maximum number of weeks. (You cannot change the grayed out fields.)
3. On the application bar, click  to save your changes.

   The blue triangle turns red to show that you have overridden the default value.

See:
Employee Information

Viewing Detailed Employee Information

From the Team Information tab, you can view employee hours and activities per employee, for each hour of the selected day.

To view detailed employee information:

1. Click the Team Information tab:

   Employee Maintenance > Team Information

2. Click once in the appropriate cell in the Team Information table.

   The employee hours and activities appear in the Detailed Information tab

- **Availability**: Total hours the employee is available to work on the selected day.
- **Preferred**: Employee's preferred work hours.
- **Fixed**: Hours the employee must work within a specific time range on that day
- **Scheduled**: Total hours the employee is scheduled to work on that day
- **Activity**: Total scheduled hours, broken down by activity.

Note: Scheduled and Activity only contain information if you have generated the schedule.

See:
Employee Maintenance Overview
Submitting a Schedule for Optimization
Team Information

Dashboards

DASHBOARDS OVERVIEW

The Dashboards module provides tabs that provide real-time information to help you understand the performance of your store:

- Sales Performance
- Daily KPI
- Weekly KPI (weekly)
- Weekly KPI (long term)

Dashboards include indicators for:

- Sales quality
- Costs quality
- Schedule quality

The KPIs in these dashboards provide answers to questions, such as:

- How are my current weekly sales doing compared to the budget?
- How is the current week going?
- What is the current trend?

If your organization enabled long term scheduling, you can contrast the team's potential for workload coverage to the demand hours, and evaluate scheduled costs.

All dashboards can display specific department information. For departmental KPIs, you select the department in the application bar.

Unless you are viewing KPIs immediately after generating a schedule, you should update the dashboard information OWS displays. Click the Refresh Dashboard buttons in the Sales Performance tab. These buttons update the data in all the dashboards. (The Refresh Dashboard button for long term is only available if long term scheduling is enabled.)

SALES PERFORMANCE

The Sales Performance tab is in the Dashboards module. From this tab, you can compare your daily sales for the week against the budget.

Budget ($)	Sales target set at corporate level. This is the same value as displayed on the Budget Sales line on the Forecast Summary page when you select a store.
Forecast ($)	Your sales forecast for the day. This is the same value as displayed on the Adjusted Forecast line on the Forecast Summary page when you select a store.
Actual ($)	Actual sales generated by the store. This value is imported from the store system.

Refresh Dashboard Buttons

Unless you are viewing KPIs immediately after generating a schedule, you should update the dashboard information OWS displays. Click the Refresh Dashboard buttons in the Sales Performance tab. These buttons update the data in all the dashboards. (The Refresh Dashboard button for long term is only available if long term scheduling is enabled.)

See:
Dashboards Overview
Forecast Summary

WEEKLY KPIS (LONG TERM)

The Weekly KPI tab is in the Dashboard module (long term process). The Weekly KPI tab helps you monitor the key performance indicators for sales, hours, cost, and performance on a yearly basis.

To view the KPIs:

- In the application bar, click  to select the organizational level you want to view.

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

Sales

Initial Budget ($)	Original sales target set at the corporate level. If the value was changed in the course of the year, the new value is shown on the Budget ($) line below.
Budget ($)	Sales target set at the corporate level. This is the same value as displayed on the Budget line on the Forecast Summary page, when you select a store.
Forecast ($)	Your sales forecast. This is the same value as displayed on the Adjusted Forecast line, on the Forecast Summary page when you select a store.
Actual ($)	Actual sales generated by the store. This value is imported from the store system.

Hours

Initial Budget (Hrs)	Original workload target set at the corporate level, in hours. If this value was changed in the course of the year, the new value is shown on the Budget (Hrs) line below.
Budget (Hrs)	Workload target set at the corporate level, in hours. This is the same value as displayed on the Budget line on the Demand Summary page when you select a store.
Demand (Hrs)	Your workload requirement, in hours. This is the same value as displayed on the Demand Hours line on the Demand Summary page when you select a store.
Scheduled (Hrs)	Number of hours scheduled in the optimized schedule.
Actual (Hrs)	Number of hours actually worked by your employees. This value is imported from the store system each night.

Costs

Initial Budget ($)	Original cost target set at the corporate level. If this value was changed in the course of the year, the new value is shown on the Budget ($) line below.
Budget ($)	Labor cost target set at the corporate level.
Scheduled ($)	Labor cost for the store, according to the optimized weekly schedule.
Actual ($)	Actual labor cost. This value is imported from the store system each night.

Performance

Demand (Hours)	The workload requirement, in hours. This is the same value as displayed on the Demand Hours line on the Demand Summary page when you select a store.
Minimum Potential	The minimum number of hours the employees can be scheduled to work for the selected organizational level. (OWS takes into account the minimum weekly duration, the minimum duration of the respective week types, the available hours, and the edits made to the schedule.)
Maximum Potential	The maximum number of hours the employees can be scheduled to work for the selected organizational level. (OWS takes into account the maximum weekly duration, the maximum duration of the respective week types, the available hours, and the edits made to the schedule.)
Scheduled Hours	The scheduled workload, in hours. (The number of hours scheduled by the optimization engine, not including absences, plus the number of hours scheduled manually.)
Demand Coverage (%)	The percentage of the workload covered by schedule. (The scheduled hours divided by the demand hours.)
Scheduled Costs	Labor costs for the scheduled work. (Scheduled work hours for each employee are multiplied by the average pay rate of each employee.)

Reminder: Click Refresh Dashboard Long Term in the Sales Performance tab to refresh dashboard data.

WEEKLY KPIS

The Weekly KPI tab is in the Dashboards module (weekly process). This tab helps you monitor the key performance indicators for sales, hours, costs, and Sales Per Associated Hours (SPAH) on a weekly basis. The Weekly KPI tab contains several pages that display values for indicators, such as budget, forecast, demand, and actuals to help you track the performance of the store.

To view the KPIs:

- In the application bar, click  to select the organizational level you want to view.

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

Sales

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

Hours

Initial Budget (Hrs)	Original workload target set at the corporate level, in hours. If this value was changed in the course of the year, the new value is shown on the Budget (Hrs) line below.
Budget (Hrs)	Workload target set at the corporate level, in hours. This is the same value as displayed on the Budget line on the Demand Summary page when you select a store.
Demand (Hrs)	Your workload requirement, in hours. This is the same value as displayed on the Demand Hours line on the Demand Summary page when you select a store.
Scheduled (Hrs)	Number of hours scheduled in the optimized weekly schedule.
Earned (Hrs)	Daily hour requirements calculated based on actual driver values.
Actual (Hrs)	Number of hours actually worked by your employees. This value is imported from the store system each night.
Last Year Actual (Hrs)	Number of hours actually worked by your employees on the same date last year.
Adjusted Variance to Budget (Hrs)	Hours Workload budget multiplied by Target Sales Ratio - Actual Hours Scheduled
Variation to Last Year (%)	Difference between this year and last for the same week.
Additional Budget (Hrs)	Hours allowed in addition to budget.
Additional Scheduled (Hrs)	Additional hours that you scheduled.
Budget ($)	Sales target set at corporate level, in dollars. This is the same value as displayed on the Budget line on the Forecast Summary page when you select a store.
Forecast ($)	Your sales forecast, in dollars. This is the same value as displayed on the Adjusted Forecast line on the Forecast Summary page when you select a store.
Actual ($)	Actual sales generated by the store, in dollars. This value is imported from the store system each night.

Costs

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

Performance

Budget SPAH ($/Hours)	Budgeted sales per associated hours. This is budgeted sales in dollars divided by budgeted hours of work (rounded).
Forecast SPAH ($/Hours)	Forecasted sales per associated hours. This is forecasted sales in dollars divided by forecasted hours of work (rounded).
Actual SPAH ($/Hours)	Actual sales per associated hours. This is actual sales in dollars divided by actual hours of work (rounded).
Budget Costs/Sales (%)	Budgeted payroll cost divided by store sales in dollars.
Actual Costs/Sales (%)	Actual payroll cost divided by store sales in dollars.
Over Staffing (%)	Weekly number of over-staffed hours divided by weekly scheduled hours.
Schedule Efficiency (%)	Weekly measure of how well the workload has been covered. 100% corresponds to no over staffing or under staffing.
Under Staffing (%)	Weekly number of under-staffed hours divided by weekly scheduled hours.
Budget ($)	Sales target set at the corporate level, in dollars. This is the same value as displayed on the Budget line on the Forecast Summary page when you select a store.
Forecast ($)	Your sales forecast, in dollars. This is the same value as displayed on the Manager line on the Forecast Summary page when you select a store.
Actual ($)	Actual sales generated by the store, in dollars. This value is imported from the store system each night.

Week Number

Current Year Week Number	The number of the week from the beginning of this calendar year.
Last Year Week Number	The number of the week from the beginning of the previous calendar year.

The date on which the first week starts depends on your configuration. For example, if the administrator defines Monday as the start of the first week, and the actual calendar year begins on a Thursday (January 1), the application uses Monday (January 5) as the basis for counting the number of weeks since the beginning of the year.

Reminder: Click the Refresh Dashboard button in the Sales Performance tab to display the most recent dashboard data.

DAILY KPIS

The Daily KPI tab is in the Dashboards module. The KPIs are daily. In the application bar, click  to select the department you want to view. Click a dashboard name below to show/hide the dashboard.

Sales

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

Hours

Initial Budget (Hrs)	Original workload target set at the corporate level, in hours. If this value was changed in the course of the year, the new value is shown on the Budget (Hrs) line below.
Budget (Hrs)	Workload target set at the corporate level, in hours. This is the same value as displayed on the Budget line on the Demand Summary page when you select a store.
Demand (Hrs)	Your workload requirement, in hours. This is the same value as displayed on the Manager line on the Demand Summary page when you select a store.
Scheduled (Hrs)	Number of hours scheduled in the optimized weekly schedule for that day.
Earned (Hrs)	Daily hour requirements calculated based on actual driver values.
Actual (Hrs)	Number of hours actually worked by your employees. This value is imported from the store system each night.
Last Year Actual (Hrs)	Number of hours actually worked by your employees on the same date last year.
Adjusted Variance to Budget (Hrs)	Hours Workload budget multiplied by Target Sales Ratio minus Actual Hours Scheduled
Variation to Last Year (%)	Difference between this year and last on the same date.
Budget ($)	Sales target set at the corporate level, in dollars. This is the same value as displayed on the Budget line on the Forecast Summary page when you select a store.
Forecast ($)	Your sales forecast, in dollars. This is the same value as displayed on the Manager line on the Forecast Summary page when select a store.
Actual ($)	Actual sales generated by the store, in dollars. This value is imported from the store system each night.

Costs

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

Performance

Budget SPAH ($/Hours)	Budgeted sales per associated hours. This is budgeted sales in dollars divided by budgeted hours of work (rounded).
Forecast SPAH ($/Hours)	Forecasted sales per associated hours. This is forecasted sales in dollars divided by forecasted hours of work (rounded).
Actual SPAH ($/Hours)	Actual sales per associated hours. This is actual sales in dollars divided by actual hours of work (rounded).
Budget Costs/Sales (%)	Budgeted payroll cost divided by store sales in dollars.
Actual Costs/Sales (%)	Actual payroll cost divided by store sales in dollars.
Over Staffing (%)	Daily number of over-staffed hours divided by daily scheduled hours.
Under Staffing (%)	Daily number of under-staffed hours divided by daily scheduled hours.
Schedule Efficiency (%)	Daily measure of how well the workload has been covered. 100% indicates no over staffing or under staffing.
Budget ($)	Sales target set at the corporate level, in dollars. This is the same value as displayed on the Budget line on the Forecast Summary page when you select a store.
Forecast ($)	Your sales forecast, in dollars. This is the same value as displayed on the Manager line on the Forecast Summary page when you select a store.
Actual ($)	Actual sales generated by the store, in dollars. This value is imported from the store system each night.

Reminder: Click Refresh Dashboard in the Sales Performance tab to refresh dashboard data.

See:
Dashboards Overview
Forecast Summary

Utilities

UTILITIES OVERVIEW

The Utilities module contains the tabs listed below. OWS uses the data in these tabs to determine forecasts and hour requirements.

To uniformly manage your stores, global values can be specified during configuration for functions, such as forecasts and hour requirements, set at the corporate level.

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

This tab displays 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

This tab 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, and store parameters.

Driver

This tab displays the actual drivers imported into the OWS application, derived drivers, and the percentage weights applied to actual driver values for the past weeks. If you have both weekly and long term scheduling enabled, OWS identifies which drivers are weekly or long term.

Store Closing

This tab displays the dates on which a store remains closed. A store manager can override these values to cover exceptions for individual stores.

Bank Holidays

This tab displays a calendar that highlights the days on which bank and public holidays occur. The bank holidays are taken into account in the optimization of the schedules.

See:
Forecast Summary
Demand Summary

DRIVERS HISTORY

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). The administrator determines the number of weeks used for the forecast during the OWS setup.

- Drivers History Daily: Shows driver data for each day. This table is only available 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 systems and then imported into OWS. These forecasts are called "pre-forecasted" forecasts.

- Drivers Pre-Forecasted Daily: Shows driver data for each day. This table is only available if your store data allows this level of detail.
- Drivers Pre-Forecasted Weekly: Shows driver data for each week.

See:
Forecast Summary
Utilities Overview
Viewing Driver History
Viewing Pre-Forecasted Driver Forecasts

WEEK TYPE

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. A single week type can be used for multiple drivers, activities, or profiles. As an example, you might have a week type called "Peak week" for sales, transactions, and traffic drivers.

You can assign week types manually or automatically by creating rotations. The method used depends on the driver, activity or profile selected. For week types assigned manually, you 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.

Note: The week types displayed in the Utilities module are the work weeks used to generate the data in the Forecast and Demand steps; the week types displayed in employee maintenance are the work week types associated to the employee's contract and are used to generate an individual's schedule. (The configuration defined by your administrator at setup determines whether you can access the Week Types tab from the Employee Maintenance or Contracts module.)

See:
Managing Week Types
Utilities Overview

DISTRIBUTION

The Distribution tab located 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.

This tab contains two pages: Daily Distribution and Weekly Distribution

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.

The administrator creates the weekly and daily profiles at setup using OWS Designer. 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 Drivers tabs.

There are two pages in this tab:

- 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.

These tabs are directly tied to the Drivers History and Actual Drivers tabs. You cannot modify the profile setup, but if necessary, you can edit the profile values provided by the administrator.

See:
Driver
Drivers History
Updating Distribution Profiles
Utilities Overview
Viewing Daily and Weekly Distribution Profiles

TIME WINDOW

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:
Deleting Exceptional Changes to Time Frames
Making Exceptional Changes to Time Frames
Updating Time Frame Profiles
Utilities Overview
Viewing Time Frames

PROPERTIES

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

The Properties tab contains three pages: Activity, Task, and Store. If you have long term scheduling enabled, OWS identifies which activities and tasks are weekly or long term.

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 or long term schedule that does not meet your actual needs.

Activity

This page displays a number of parameters for each activity. The functional administrator defines 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. As an 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, skills with the highest priority would have a greater chance of being covered than skills with a lower priority. .
- Hourly Cost: Defines the cost per hour per activity, and is used by the application when calculating the cost to adjust the demand cost relative to the labor cost.

Task

This page displays several task parameters. Tasks are components of each activity. The functional administrator defines the values of these task parameters at setup, but you can edit them.

Note:The default values are automatically inherited from the organizations higher in the hierarchy. 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 your system administrator.

You can select one task at a time, and then edit the following parameters:

- Compression Factor: In the Demand step, if the total number of hours in a Demand Hours cell 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. (Special Fixed Activities and fixed activities are not adjusted based on compression factors.)

  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.

- Expansion Factor: In the Demand step, if the total number of hours in a Demand Hours cell falls below the Budget for a given day, clicking Update Demand recalculates or "expands" the hours so that each daily total reaches the assigned budget for that day. However, OWS does not expand all tasks proportionally. The expansion factor defines the maximum level that the hours for a given task can be expanded. (Special Fixed Activities and fixed activities are not adjusted based on expansion factors.)

  For example: An expansion factor of 20% means that 20% of the hours initially required for the task can be expanded. In this instance, a requirement of 100 hours can be expanded by 20 hours. An expansion factor of 0% means the task cannot be expanded at all.

- Mix Percent: You can break a task into several activities. Through the Mix Percent parameter, you can control the way this breakdown occurs. Mix Percents 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. Using Mix Percent, 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 your store. The functional administrator usually determines these values during setup, but you can edit them.

- Store Property: Store properties represent "physical" characteristics specific to a store. Store parameters are generally constant. They are not greatly affected by factors such as business levels or week types. 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.

  If your budget is based on labor costs, included in the store properties parameters is the ability to change the percentage used by the application in the demand budget as a basis for calculating the workload costs. 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 are granted (typically by an administrator, district manager, or other corporate role) in addition to the store budget defined in the Demand Summary. 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).

See:
Editing Activity Parameters
Editing Store Parameters
Editing Task Parameters
Utilities Overview

DRIVER

The Driver tab is located in the Utilities module. Use this tab to:

- View actual drivers
- View and modify derived drivers
- Change the percentage weights applied to previous weeks that the application uses to calculate the current forecast

Actual Daily Driver

This page displays actual drivers. The application uses actual drivers to calculate the Earned Hours data displayed in the Dashboard module. Actual drivers are the real values of drivers recorded by the store and imported 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.

- Actual Daily Driver: Shows actual driver data per day. This table is only available if your store data allows this level of detail (defined by your administrator during setup).
- Actual Weekly Driver. Displays the imported actual driver data. To translate it into the Earned Hours data, the application automatically breaks down the weekly data into daily data based on distribution profiles.

Derived Driver

This page displays derived drivers. If you have both weekly and long term scheduling enabled, OWS identifies which derived drivers are weekly or long term.

In some cases, the functional administrator may determine that a driver needs to be calculated based on another driver. Drivers calculated in this way are called derived drivers. The application calculates a derived driver by multiplying or dividing by:

- The value of the driver on which it is based by a coefficient
- The driver by another driver, a derived driver, or a store property

From this page, you can view or edit the information.

Recent Weeks Weight

This page displays the percentage weights assigned to a driver's actual value for the past weeks. The number of weeks and the percentage applied to each week depend on the information entered during setup. The application calculates the values for those weeks using the percentage weights, and derives an average that it uses to calculate the forecast values for the current week.

You can change the weight percentages that apply to the driver values. For example, you might adjust the percentages for the sales driver to increase the percentage based on last week's actual sales for the forecast calculations. These percentage weights are not dated, so all forecasted weeks apply these percentages to the driver calculations.

See:
Editing Weekly Percentage Weights
Editing Derived Driver
Distribution
Utilities Overview

STORE CLOSING

The Store Closing tab is part of the Utilities module. You can use this tab to view:

- The dates on which the store is closed for business.
- The percentage of impact of the closed store on the drivers and activities of the store.
- The activities that have to be performed and the employees who may be required to work on the day the store is closed.

OWS calculates the forecasts and the driver values, and sets the demand to zero for activities that you indicate do not have to be performed when the store is closed.

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. However, you can modify the values manually for each day and each affected driver, if necessary.

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. As an 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

BANK HOLIDAYS

The Bank Holidays tab is located in the Utilities module. You can use this tab to view a calendar that displays the holidays. Bank holidays can include holidays typically observed by commercial and government entities or they can include holidays which are observed locally in the region or at a store. The application takes holidays into account when optimizing the schedule. The employee's contract terms determine whether the employee can be scheduled to work on holidays, but to accommodate exceptions, you can change this default for an employee in the scheduling rules.

Calendar

Bank holidays are usually entered in the calendar at the top level of the organization, such as the corporate level. These holidays appear on the calendars of the organizations below that level. As a rule, any change made to a calendar cascades to the calendars of the organizations below it. Each organizational level that inherits the change can accept, delete, or restore the change made to its calendar. Each organization can also add local holidays. When you add or change a holiday, the application sends a notification to the to-do list to inform other stores of the change.

Bank Holiday Impact

Employee contracts defined during configuration specify whether employees should work on holidays; never work on holidays; or work on holidays, as required. You can override this default information by changing the Work on Bank Holidays option for the employee on the Scheduling Rules tab of the Employee Maintenance module. (Access to this module is based on the configuration defined by your administrator.)

In determining whether to schedule an employee for a day off or a work day on a holiday, OWS takes into account the Work on Bank Holidays option and also other typical optimization information, such as whether the employee is available for work that day and whether the employee has been:

- Rescheduled to work or assigned to a business activity on that day
- Scheduled for an absence day
- Loaned to another store

See:
Managing Bank Holidays

How Tos

Viewing Driver History

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

To view driver history:

1. Open the Drivers History page:

   Utilities > Drivers History tab > Drivers History (default)

2. Select a date on 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
Forecast Summary
Viewing Pre-Forecasted Driver Forecasts

Viewing Pre-Forecasted Driver Forecasts

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 on 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 your store data system.

See:
Drivers History
Forecast Summary
Viewing Driver History

Managing 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)
   - If no link appears at the bottom of the page, you can manually edit the week types

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

To edit a week type rotation:

1. Click Update Week Type Rotation (bottom of the page).

   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.
3. If you are changing the rotation information, the Rotation Description page opens. There is a row for each week in the current rotation.

   - Using the list in the first row, edit the week type information for the first week in the rotation.
   - Repeat this step for each week in the rotation. Click Next.

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

   After you finish editing all the rotations, the Rotation Assignment page appears.

5. If you are defining a new week type rotation, click  and select a range from the dialog box.

   - 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.)
   - Click Finish to confirm your changes.

6. If you are erasing a rotation, the Rotation Assignment page displays. Click Finish to delete the rotation.

To assign a week type manually:

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  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  .

   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 as described in the procedure above To Edit a Week Type Rotation.

See
Week Type

Viewing Daily and Weekly 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
Updating Distribution Profiles
Making a Daily or Weekly Exception to the Distribution Profile
Utilities Overview

Making a Daily or Weekly Exception to the Distribution Profile

From the Daily or Weekly Distribution screen, 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 will apply 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 will apply only to the day that you specify.
3. On the application bar, click  to save your changes.

See:
Updating Distribution Profiles
Distribution

Updating Distribution Profiles

From the Daily or Weekly Distribution page, 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  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  to save your changes.

To update a weekly distribution profile:

1. Click Update Distribution Rotation:

   Utilities > Distribution tab >Weekly Distribution
2. Click  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  to save your changes.

See:
Distribution
Making a Daily or Weekly Exception to the Distribution Profile
Utilities Overview

Viewing Time Frames

From the Time Window page, you can view the time frame values. Time frames are linked to week types. 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 page (default)

2. Click  to select a time frame.

   The hours for the selected time frame appear in the Time Window table.

See:
Deleting Exceptional Changes to Time Frames
Making Exceptional Changes to Time Frames
Time Window
Updating Time Frame Profiles
Utilities Overview

Making 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 page (default)

2. Click  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  to save your changes.

See:
Deleting Exceptional Changes to Time Frames
Distribution
Time Window
Updating Time Frame Profiles
Utilities Overview
Viewing Time Frames

Deleting Exceptional Changes to Time Frames

The Time Window screen allows 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 page (default)

2. Click  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 Oracle - Web Page Dialog box, click  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  to save your changes.

See:
Distribution
Making Exceptional Changes to Time Frames
Time Window
Updating Time Frame Profiles
Utilities Overview
Viewing Time Frames

Updating Time Frame Profiles

The Update Time Window page allows 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 corresponding check box for that day.
4. On the application bar, click  to save your changes.

   The Time Window page updates.

See:
Deleting Exceptional Changes to Time Frames
Making Exceptional Changes to Time Frames
Time Window
Utilities Overview
Viewing Time Frames

Editing 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 page (default)

2. Click  to select an activity.
3. Click the cell of the appropriate date, and modify the parameter.

   Note: A blue triangle indicates a cyclic value that has not been modified in the daily table. A red triangle indicates a cyclic value that has been modified in the daily table.

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

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

To edit an activity parameter cycle:

1. Open the Activity page.

   Utilities > Properties tab > Activity page (default)

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 will apply 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

Editing 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

Editing 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 granted by the administrator 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

Editing 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 > Driver tab > Derived Driver
2. Click  to select a Derived Driver.
3. Select the cell to modify the coefficient.
4. On the application bar, click  to save your changes.

See:
Driver
Utilities Overview

Editing Weekly Percentage Weights

From the Driver tab, you can view the percentages applied to the forecast across the most recent weeks. This page displays the percentage weights assigned to a driver's actual value for the past weeks. The number of weeks and the percentage applied to each week depend on the information entered during setup. The application calculates the values for those weeks using the percentage weights, and derives an average that it uses to calculate the forecast values for the current week.

You can change the weight percentages that apply to the driver values. For example, you might adjust the percentages for the sales driver to increase the percentage based on last week's actual sales for the forecast calculations. These percentage weights are not dated, so all forecasted weeks apply these percentages to the driver calculations.

To edit weekly percentage weights:

1. Open the Recent Weeks Weight page:

   Utilities > Driver tab > Recent Weeks Weight page

2. Click  and select a driver.
3. Select the cell to modify the percentage weight.

   In the left column of the table, 0 represents last week's weight, 1 represents two weeks ago, and so on. Enter in the adjacent cell the percentage weight to apply for that week.

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

See:
Utilities Overview
Driver

Closing 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 as a 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

Managing Bank Holidays

From the Bank Holidays tab, you can view and change the dates on which bank and public holidays occur. The holidays are displayed in a different color than the normal work days. Changes made to the calendar cascade to the calendars of the organizations below the organization where you make the change. You might change the calendar; for example, to add local holidays or delete holidays that the organization does not observe. In practice, most of the holidays observed throughout the organization are set at the top level and the adjustments for local holidays are entered at the store level.

Deleting a local holiday restores the previous value for that calendar day. When you add or delete a holiday, that change cascades to the calendars of the organizations below the level at which the edit occurred. The organizations that inherit the addition or deletion can reverse the action by deleting additional holidays and restoring deleted holidays.

To edit a bank holiday:

1. Open the Bank Holiday page.

   Utilities > Bank Holidays

2. Click  on the application bar and select the level of the organization where you will add or delete a holiday.

   All levels below the selected level inherit the holiday you add or delete. The organizations that inherit the change can determine if the holiday addition or deletion applies. They can then retain the change, or delete the addition and restore the deleted calendar information, as appropriate.

3. To simplify the process of updating the calendar, adding and deleting holidays works as a toggle.

   For local holidays:

   - To add a local holiday, double-click the calendar day on which the holiday occurs. The color of the calendar day changes to show that the holiday is added.
   - To delete a local holiday, double-click the calendar day again.

   For global holidays (holidays that your organizational level inherits):

   - To delete a global holiday, double-click the calendar day on which the holiday occurs. The holiday is crossed-out.
   - To restore a global holiday, double-click the calendar day again.

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

See:
Bank Holidays

Contracts

CONTRACT MANAGEMENT

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

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; however, values entered at a lower level of the hierarchy override the default values or those entered at a higher level of the hierarchy. The replacement occurs when you specify values for the contract at the lower level. As an example, if you design an open-ended contract for a 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.

Note: The following tabs are displayed in the Contract Management module and the Employment Maintenance module. Depending on the role you are assigned, you can view these tabs from one or both modules.

Scheduling Rules

From this tab, you can:

- View or modify rules and options for scheduling each employee.
- Select skilled and core skilled activities.
- Specify proficiency levels.

Break Rules

From this tab, you can view information about the types of breaks employees are eligible for during their work shifts, based on their contracts. Depending on your access rights, you can edit details of employee shifts in this tab.

Week Types

From this tab, if long term scheduling is enabled, you can view the minimum and maximum work durations for the week types associated to an employee's contract.

Constraints

From this tab, if long term scheduling is enabled, you can view the long term constraints (conditions) that the application uses when generating an optimized schedule, such as the long term and weekly contract duration.

See:
Modify a Contract

BREAK RULES

The Break Rules tab is located in the Employee Maintenance module and the Contracts module. Depending on the role assigned to your login, you can view the Break Rules tab from one or both locations.

During setup, the administrator defines day compositions, the sequence of work hours and breaks that represent the different contracts. By reviewing the break rules page, you can determine which break and shift arrangements apply to the employee. For example, the week day and weekend shifts may have the same maximum duration for the meal break, but have different start and end times.

Note: If there are no breaks scheduled for a work day of an employee, then only shift details display in the Work alone table.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees.

If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step. The Employee Alerts icon shows any generated alerts and their severity level. Click the Employee Alerts link to view the Issues list.

See:
Editing Employee Break Details
Employee Maintenance Overview
Pre-Scheduling Check
Viewing Employee Break Details

CONSTRAINTS

The Constraints tab is located in the Employee Maintenance module and the Contracts module. Depending on the role assigned to your login, you can view the Constraints tab from one or both locations.

The Constraints tab displays conditions that OWS applies when generating an optimized long term schedule. For example, OWS performs schedule optimization by matching the requirements from the Demand step against constraints, such as the long term contract duration. You can use this page to review the work duration and team constraints defined during set up, and to change the values for these constraints as needed. When you change the values in the:

- Contracts module, your changes apply to all employees who have that constraint as part of their contract.
- Employee Maintenance module, your changes apply to the individual employee who has that constraint as part of his or her contract.

Work Constraints

The work duration information takes into account the projected paid and unpaid absence durations.

- Weekly contract duration: The number of contractual hours the employee can work in a week.
- Yearly contract duration: The number of contractual hours the employee can work in a year

  The long term contract duration is often defined as the weekly contractual duration multiplied by the number of weeks (52 or 53).
- Average work duration: The mean weekly work duration for the employee

  OWS calculates the mean weekly work duration based on the minimum and maximum weekly work duration within a specified period of time.
- Week types constraint: The minimum or maximum number of weeks a specific week type can occur within a period of time
- Week sequence: The number of consecutive weeks a week type repeats within a time period. You can specify a number that limits the consecutive week sequence, or sets a minimum number that OWS can exceed when scheduling the remaining week types in the month.

  For example, if you have 3 week types (high, medium, low demand), the configuration might specify that the medium demand week occur:

  - No more than 2 consecutive times in the month. OWS would schedule the week following the sequence with a low or high week, depending on the forecasted workload and the employees contract terms.
  - At least 2 consecutive times in a month. OWS would schedule the following week as medium, low, or high, depending on the forecasted workload, and the employee's contract terms.

Team Constraints

The application uses the team constraints to allocate the work fairly among the employees. In equalizing the workload, the application takes into account the week composition and work duration.

Other Constraints

Other long term and weekly constraints are managed in the remaining employee maintenance pages where you can override the values, if required; for example:

- Scheduling rules displays constraints that you can override for an individual employee, such as the yearly and weekly contract duration and the rule governing whether a specific employee works on bank holidays
- Week Types displays the work durations for the week types associated to an employee's contract
- Break rules displays contract variables of day compositions (the sequence of work hours and breaks that represent the different contracts)
- Minor Rules displays labor rules for employing minors
- Availability displays fixed, preferred, and available hours

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

See: Viewing and Modifying Constraints

WEEK TYPES

The Week Types tab is located in the Employee Maintenance module and the Contracts module. Depending on the setup defined by your administrator, you can view the Week Types tab from one or both locations. The employee's contract determines which week types are listed. You can use this page to review the minimum and maximum number of work hours defined during set up, and to change these values, as required. When you change the values in the:

- Contracts module, your changes apply to all employees who have that week type as part of their contract.
- Employee Maintenance module, your changes apply to the individual employee who has that week type as part of his or her contract.

Note: The week types displayed in the Utilities module are the work weeks used to generate the data in the Forecast and Demand steps; the week types displayed in employee maintenance and contract modules are the work week types associated to the employee's contract and are used to generate an individual's schedule.

Work Durations

OWS uses the week types as one of the components in calculating the employee's schedule. The application takes into account the rules about week types, such as how many times the week type can or cannot occur within a specific period, and which employees have contracts that include that week type. As an example, the configuration might specify that high-volume week types apply to full-time employees, but not to part-time employees. If the workload required a high volume week, the application would schedule only full-time employees

The work durations defined during configuration apply to all employees whose contracts include the week types. You can manually change the default work durations for an individual employee. To accommodate individual contracts, you can enter minimum and maximum work durations specific to the employee in the Scheduling Rules and OWS will use these values when optimizing the schedule for the employee.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees. If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step.

See:
Employee Maintenance Overview
Viewing and Modifying Week Types
Scheduling Daily Absences (long term process)
Scheduling the Week Type (long term process)

SCHEDULING RULES

The Scheduling Rules tab is located in the Employee Maintenance module and the Contracts module. Depending on the role assigned to your login, you can view the Scheduling Rules tab from one or both locations.

The Scheduling Rules tab displays the current scheduling rules and the activities that correspond to the employee's skill set. From this tab, you can modify the rules for scheduling employees and specify the skills and core skills.

Pay Information

The Pay Information table displays details of the pay type (Full Time or Part Time) and the pay rate of an employee. You can edit all parameters except Pay Type which you can change on the Employee Information tab with the Manage Contracts link.

Scheduling Rules and Options

The Scheduling Rules and Options provide the basic guidelines for scheduling each employee. Guidelines include parameters such as minimum work hours per week and per day, the maximum late nights that an employee can work, and the late night time limit. You can manually change the default parameters defined during configuration.

Employee Skills

OWS uses the skill parameters you select for an employee when it generates the optimized schedule. You can add or remove skills for each employee.

OWS also takes into consideration the order of skill level and the employee's proficiency when generating a schedule. The proficiency level ensures that if there are several employees for a given activity with the same skills. OWS schedules the employees with the highest level of proficiency during the daily business peaks.

Employee Core

OWS uses the core activities you select for an employee when it generates an optimized schedule. You can add or remove core activities for each employee. Core activities are different from other activities in that they do not actually appear in the Demand Summary tab or in the optimized weekly schedule.

Check People

The employee maintenance pages include Check People buttons: Check People (weekly process) and Check People (long term process), if both weekly and long term scheduling are enabled. You can use these buttons after you edit employee data to have OWS run a data consistency check for all store employees.

If there are inconsistencies, OWS generates alerts. You must resolve red alerts or they will reappear in the Check step. The Employee Alerts icon displays any alerts and their severity level. Click the Employee Alerts link to view the Issues list.

See:
Editing Core Activities
Editing Preferred Skills
Employee Maintenance Overview
Viewing Employee Scheduling Rules and Activities

How Tos

Modify a Contract

In the Contract Values tab, you can modify the default values of a contract, including the:

- Scheduling rules, the rules and options for scheduling an employee's time, such as the time between shifts
- Break rules, the details of the sequence of work hours and breaks that compose a shift
- Week types, the week types defined during configuration that are associated to an employee's contract
- Constraints, the guidelines that OWS applies when scheduling the employee

To modify a contract:

1. On the module bar, click Contracts Values.
2. On the application bar, click  to display the level of the team hierarchy that contains the contract. Display the sublevels by clicking the plus sign.
3. On the tabbed page, click  to display the list of contracts, and select the contract you want to modify.
4. On the tabbed page, enter missing information in the cells or edit existing information.

   To edit a time in hours and minutes, 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. When you change the value, the color of the triangle changes to indicate that the local value has replaced the value inherited from a higher node in the team hierarchy.

   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
5. When you complete the modifications, click  on the application bar to save the new values.

   The application modifies the contract based on the values you entered.

See:
Contract Management

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. If you have both weekly and long term scheduling enabled, the application identifies the procedures as weekly or long term
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

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 check box 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.

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

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

Events

EVENTS MANAGEMENT

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.

After you define an event, you can assign it to a specific store.

See:
Define and Assign a Global Event
Edit a Global Event
Delete a Global Event

How Tos

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.

Note: The location of the Hierarchy Event page (Forecast step of the Weekly Process or Events Module) depends on the role assigned to your login.

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 navigate to the Hierarchy Event tab. Depending on the role assigned to your login:
   - Click Events, and click Hierarchy Event
   - Click Weekly Process, click Forecast step, and click Hierarchy Event

   The Events List displays the list of events you can declare.
2. On the application bar, select the appropriate business organization level to which you want to assign the event.
3. In the History table, click  .

   The Create a Range window opens.
4. 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.
5. Click OK to close the dialog box.

   A new line is added to the History table.
6. On this new line, select an event name from the list.
7. In the application bar, click  to save your changes.

See:
Edit a Global Event
Delete a Global Event

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:
Events Management
Define and Assign Global Events
Delete a Global Event

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:
Events Management
Define and Assign Global Events
Edit a Global Event

Job Scheduler

JOB SCHEDULER OVERVIEW

The Job Scheduler module gives you control over scheduling jobs through the following pages:

- **Export Schedule:** Exports workforce schedules to other applications, such as Human Resources, Time and Labor, and Time and Attendance.
- **Export KPIs:** Exports workforce key performance indicators (KPIs) format to other applications. You can create an extract of daily or weekly KPIs.
- **Calculations:** Processes jobs in batches. To coordinate results, you could schedule the batch jobs for all stores. For example, you might run the weekly process updates on the same day for each store within the district so that managers can more easily coordinate resources.

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

Job Scheduler

The Job Scheduler window is common to all three pages. It captures information about when a job runs, how often, and what period the job covers for the selected business or team node. Each page contains additional information that you complete after supplying the schedule details. For example, on the Calculations page, you select which batch process you want to run, and on the Export KPIs page which KPIs to export. If you have enabled both weekly and long term scheduling, OWS identifies the jobs as weekly or long term.

The following scenarios describe how to complete the Schedule, Run Job, and Period Covered parameters to solve typical scheduling demands.

Scenario 1

Requirement: Schedule a job to run every Monday for two months to export the previous week's schedule.

Scenario Current Date: Monday June 2	Start Date	End Date (excluded)	Frequency	Job Day	Export Time	Begins	Number	Interval	Type
Starting this week, export the schedule on Monday for the previous week. Continue for the next 2 months	June 2	August 4	Weekly	Monday	12:00 PM	Before	1	Week	Business

Scenario 2

Requirement: Run a job today to generate the weekly KPI reports for this week and the last two weeks.

Scenario Current Date: Monday June 2	Start Date	End Date (excluded)	Frequency	Job Day	Export Time	Begins	Number	Interval
Export the KPIs from the last 2 weeks, including the KPIs for this week	May 26	June 9		Now		Job Start Date		

Scenario 3

Requirement: Set up two jobs, one to run the forecast batch process for the current week, the other to run the forecast batch process for the following week. Note: For each process you enter the same Start Date and End Date for the three week period, but you produce different results based on the criteria entered for Period Covered:

- Job Start Date updates the forecast for the current week, producing forecast updates for June 2, June 9, and June 16
- After 1 Week updates the forecast for the following week, producing forecast updates for June 9, June 16, and June 23

Scenario Current Date: Monday June 2	Start Date	End Date (excluded)	Frequency	Job Day	Export Time	Begins	Number	Interval	Type
Each Monday run the forecast batch process for the current week. Continue for the next 3 weeks.	June 2	June 23	Weekly	Monday		Job Start Date			Forecast Batch
Each Monday run the forecast batch process for the following week. Continue for the next 3 weeks.	June 2	June 23	Weekly	Monday		After	1	Week	Forecast Batch

Job Management

After you initiate jobs using the Job Scheduler, you can use the Job Management module to view the status of jobs, update the priority and start dates of pending jobs, and cancel jobs from the queue.

See:
Job Management

How Tos

Export a Workforce Schedule

Use the Export Schedule page to export workforce schedules to other applications, such as Human Resources, Time and Labor, and Time and Attendance. The application generates an XML file at the path specified during the configuration of the Integration Server, using the OWS Admin application.

To export a workforce schedule:

1. On the application bar, select the level of hierarchy for which you want to schedule the job.
2. Open the Export Schedule page:

   Job Scheduler > Export Schedule
3. In the Schedule window, enter Start Date and End Dates to specify the period of time during the job runs.
4. In the Run Job window, select a Frequency.

   The application runs the job based on the frequency throughout the period defined in the Schedule window. For example: If the scheduled dates cover a 2 month period, and you select Weekly, the application exports eight schedules.
5. Select the Job Day (the day on which the job runs) and enter a Job Time. The frequency determines the choices:

- Monthly frequency:
  - Select a number for the day of the month on which to export the schedule.
  - Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. The time format depends on the language specified during setup.
- Weekly frequency:
  - Select the day of the week on which to export the schedule. You define the first day of the week during setup.
  - Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. The time format depends on the language specified during setup.
- Daily Frequency
  - Select none (blank) to have the application run the job at the Job Time.
  - Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. The time format depends on the language specified during setup.

6. Enter a Job Time.
7. In the Export Schedule Type, select:

- 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).

8. Click Create Job.

   The application runs the job. You can use the Job Management module to view the status of jobs, update the priority and start dates of pending jobs, and cancel jobs from the queue.

See:
Job Scheduler Overview
Job Management

Export Key Performance Indicators

Use the Export KPIs page 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 KPIs, such as a weekly summary of the KPIs for all the stores in a given region. The application generates an XML file at the path specified during the configuration of the Integration Server, using the OWS Admin application.

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).

To export workforce KPIs:

1. On the application bar, select the level of hierarchy for which you want to schedule the job.
2. Open the Export Schedule page:

   Job Scheduler > Export KPIs
3. In the Schedule window, enter Start and End Dates to specify the period that you want the extract to cover.
4. In the Run Job window, select a Frequency.

   The application runs the job based on the frequency throughout the period defined in the Schedule window.
5. Select the Job Day (the day on which the job runs), and enter a Job Time. The frequency determines the choices:

   - Monthly frequency:
     - Select a number for the day of the month on which to export the KPIs.
     - Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. The time format depends on the language specified during setup.
   - Weekly frequency:
     - Select the day of the week on which to export the KPIs. You define the first day of the week during setup.
     - Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. The time format depends on the language specified during setup.
   - Daily frequency:

- Select none (blank) to have the application run the job at the Job Time.
- Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. The time format depends on the language specified during setup.

6. Enter a Job Time.
7. 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.)

8. Select a Granularity:
    - Click Day to obtain KPIs for each day during the specified period
    - Click Week for each week that falls within the period
9. Select the KPIs to export:

- Click All to export the entire list of available KPIs
- Click Custom to export selected KPIs. Select a KPI from the list of available KPIs. Click Add to include it in the list of KPIs to export. Repeat this step for each KPI you want to export.

  If you change your mind, you can select a KPI from your customized list and click Remove.

10. Click Create Job to export the KPI report.

    The application runs the job. You can use the Job Management module to view the status of jobs, update the priority and start dates of pending jobs, and cancel jobs from the queue.

See:
Job Scheduler Overview
Job Management

Schedule a Batch Process

Use the Calculations page to coordinate and update information for the stores grouped under the selected node of the business hierarchy:

- Forecast: Creates a job for the Update Forecast process for each store grouped under the same organization node of your business hierarchy. Store managers can then view the results of these updates.
- Demand: Creates a job for the Update Forecast and Update Demand process for each store grouped under the same organization node of your business hierarchy. Store managers can then view the results of these updates.
- Check: Creates a job for the for the Update Forecast, Update Demand process, and Pre-Schedule Check process for each store grouped under the same organization node of your business hierarchy. Store managers can then view the results of these schedule checks.
- Weekly Process Batch: Creates a job for the Update Forecast, Update Demand, Create Schedule (includes the Pre-Schedule Check), and Update KPIs weekly processes for each store grouped under the same organization node of your business hierarchy. Store managers can then view the results of these weekly processes.
- 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.

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

To schedule a batch process:

1. On the application bar, select the level of hierarchy for which you want to schedule the job.
2. Open the Calculations page:

   Job Scheduler > Calculations
3. In the Schedule window, enter Start and End Dates to specify the period of time during the job runs.
4. In the Run Job window, the Frequency is weekly. The application runs the job based on the weekly frequency throughout the period defined in the Schedule window.
5. Select a Job Day, the day on which the application runs the job:
   - Select the day of the week on which you want to run the batch process. You define the first day of the week during setup.
   - Select Now to start the job immediately. If you select Now, the application uses the current time for the remaining jobs. (The time format depends on the language specified during setup.
6. Enter a Job Time.

7. In the Calculation Type, select the batch process you want to run: Forecast Batch, Demand Batch, check Batch, Weekly Process Batch, Earned Hours Batch.
8. Click Create Job.

   The application runs the job. You can use the Job Management module to view the status of jobs, update the priority and start dates of pending jobs, and cancel jobs from the queue.

See:
Job Scheduler Overview
Job Management

Glossary

A

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

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

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

B

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

C

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

CCD: Customer Configuration Dictionary

Check step: The third step in the Weekly Process or the Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) Enables you to run a preliminary check to identify potential scheduling problems, to solve the problems, and to submit your schedule optimization request.

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

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

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

D

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

Demand step: The second step in the Weekly Process or the Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) It shows the hours required to perform each daily activity for the week, or each activity for each week of the year. OWS calculates these hours based on the driver forecasts.

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

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

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

E

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

Employee hours: There are three types of employee hours: availabilities, preferences, and fixed hours. Availabilities: The total hours the employee is available to work on a day . Preferences: The employee's preferred hours. Fixed hours: The 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 or the Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) It allows you to view, customize, and commit daily or weekly forecasts. 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.

I

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

K

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

L

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

Long Term Process: The core of OWS, used to generate the long term schedule. The Long Term Process consists of five steps: Forecast, Demand, Check, Schedule, and Post.

N

Non-forecasted drivers: Drivers that are not forecasted by the system because they are too unpredictable or store-specific. They are either forecasted by the administrator or left empty. You can customize the forecasts of non-forecasted drivers based on your store-specific knowledge.

O

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

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

P

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.

Post step: The last step in the Weekly Process or the Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) During this step, you display and print the schedule and complete the scheduling process.

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

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

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

R

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

S

Schedule step: The fourth step in the Weekly Process or the Long Term Process. (The availability of the weekly or long term process depends on the configuration implemented by your administrator.) During this step, you assess the optimized schedule, remove scheduling problems, and make any necessary changes to the schedule.

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

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

Store closing: 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.

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

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

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.

Index