Oracle® Workforce Management Cloud

Getting Started Guide

Update 20B

Part No. F29971-01

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ORACLE

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Oracle® Workforce Management Cloud Getting Started Guide, Update 20B

Part No. F29971-01

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Preface

This document provides you the basic instructions on basic user configuration for Oracle Workforce Management Cloud. Oracle Workforce Management Cloud was formerly known as LogFire Workforce Management.

Change History

Date	Document Revision	Summary of Changes
08/2017	01	Initial publication.
03/04/2019	02	Updated screens and content.
03/24/2020	03	Updated for 20B.

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1. System Overview

1.1 Parent-Child Company Hierarchy

In Oracle Workforce Management Cloud (WFM), companies are divided into parent and child companies. This structure exists in order to help 3PLs view and manage their clients' workforce separately. Depending on how many clients and how many warehouses the 3PL has, views can be managed.

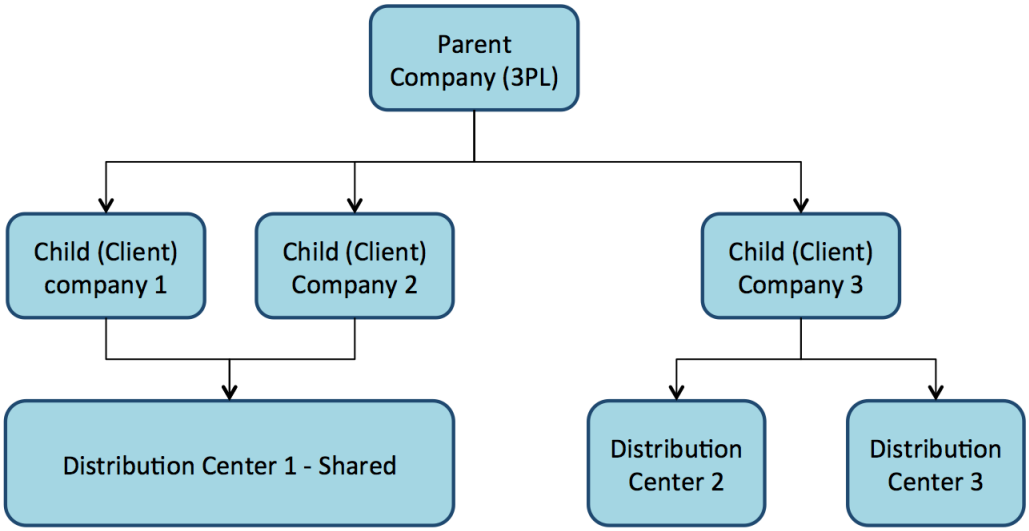

Figure 1-1: Parent-Child Company Example Diagram

To toggle a specific Distribution Center (DC) view for a company, select the choices from the two drop-down menus located at the top right of the UI screen.

In Figure 1-2, the first drop-down indicates a facility (DC), while the second drop-down denotes the companies operated within that facility:

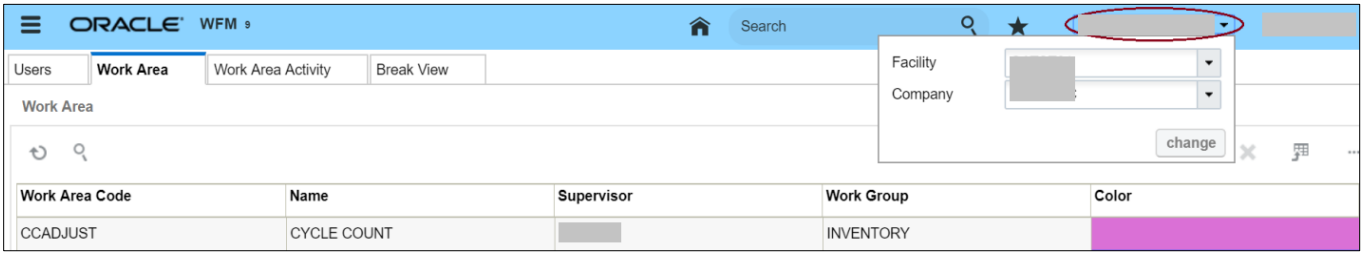

Figure 1-2: Facility and Company Views from the UI

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1.2 User Menu Configuration

Oracle Workforce Management Cloud organizes user structure in the following way:

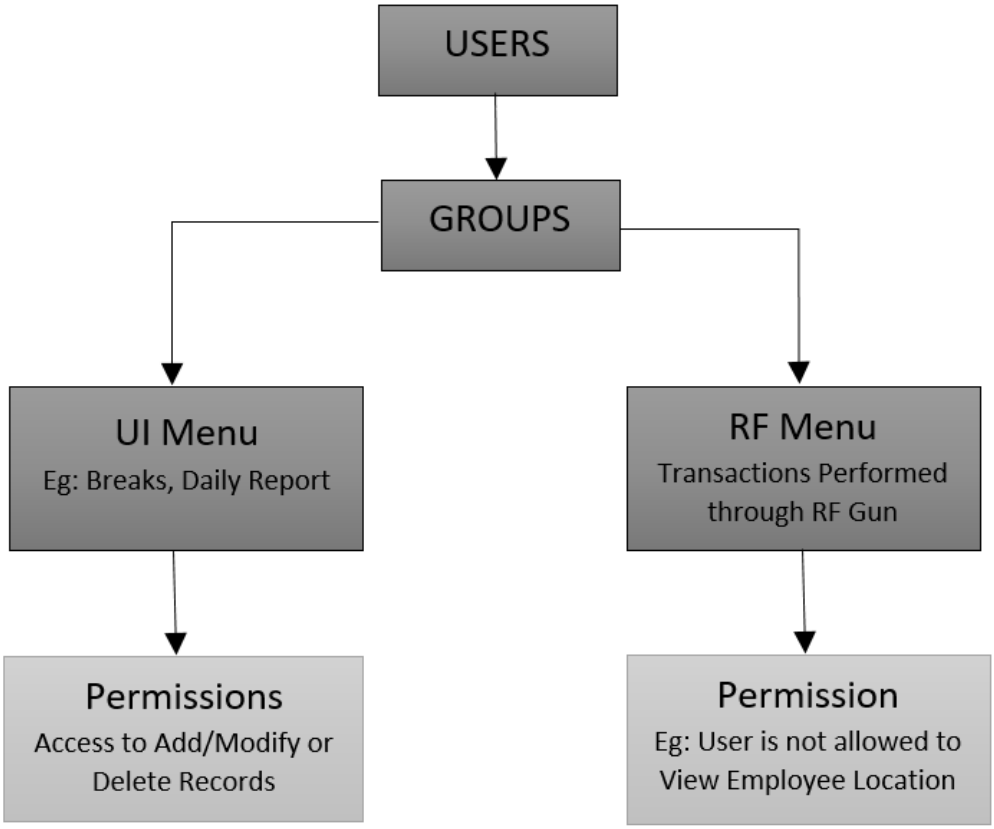

Figure 1-3: User, Group and Menu Organization

1.2.1 Users, Groups and Menus

Users are separated into groups based on their operational purpose in the warehouse. Every user within a group shares the same user interface (UI) and radio frequency (RF) menus. Within each menu, you can configure user permissions and parameters for RF menus.

1.2.2 What is a UI menu?

The UI menu is a series of views that are accessible to you in the WFM via the browser. A menu view allows you to create a UI menu and add the menu to a group. See Figure 1-4.

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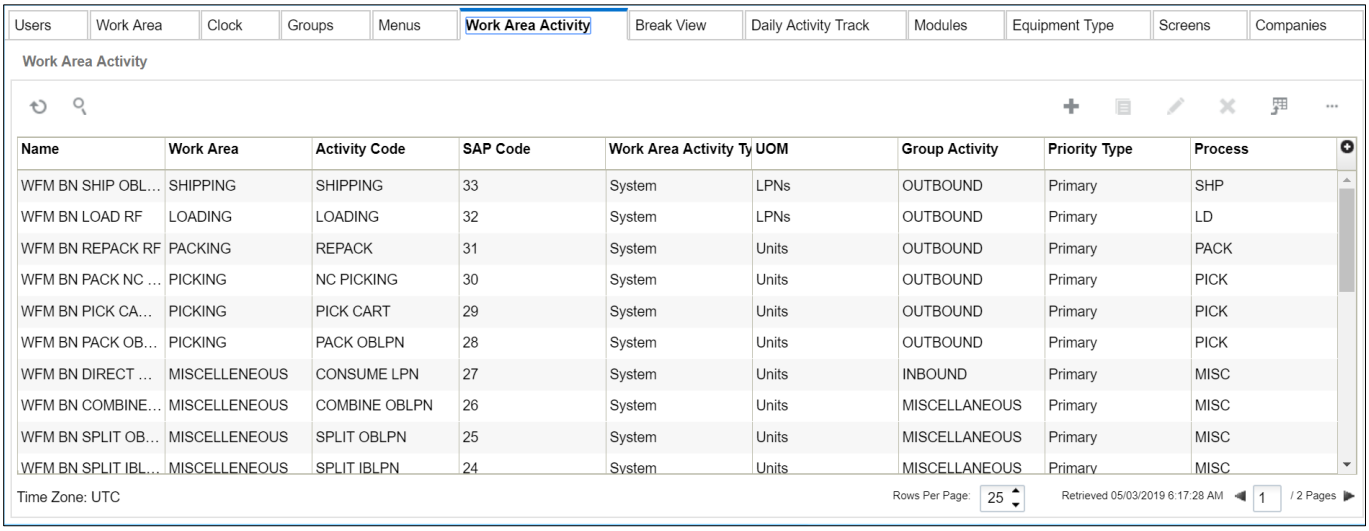

Figure 1-4: User Interface (UI) Menu

1.2.3 What is an RF menu?

The RF menu is the series of transactions that are accessible to you via the RF gun on the warehouse floor. You can use screens, or modules to perform processes such as Clocking, Break, and Employee Inquiry. Similar to creating the UI Menu, a menu view on the browser allows you to create an RF menu and add the menu to a group.

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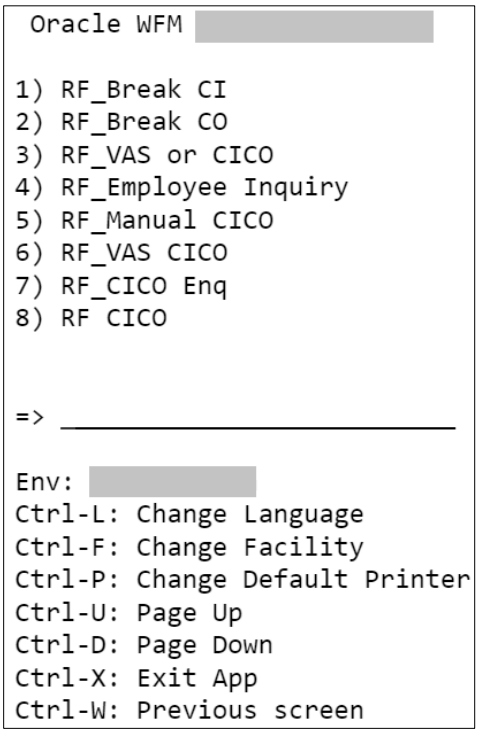

Figure 1-5: RF Menu

When you use the transactions on the RF handheld, you must ensure that you are operating the transactions in the correct facility. You can verify this on top of any view in RF as highlighted in the following figure:

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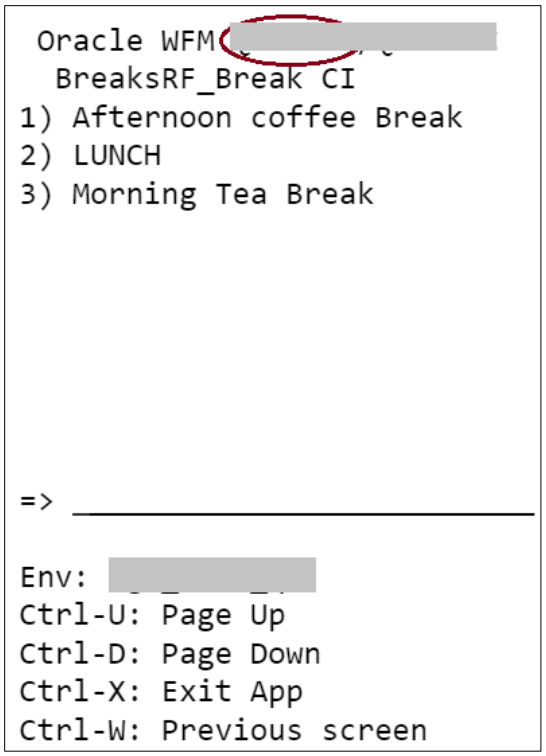

Figure 1-6: Validating Your Current Facility in the RF

Note: To change facilities, press Ctrl-F and type in the Facility code.

1.2.4 Creating Users

You can create new users via the user's screen where you can define the following:

- Username and password
- The facilities and companies the user has access for
- The user's role (Administrator, Management, Supervisor, etc.)
- The user's default group (UI and RF Menus)
- The user's language (English or Spanish)
- The user's fixed equipment type

Creating New Users

1. On the Users screen.
2. Click the **Create** ✚ button and populate the necessary fields:

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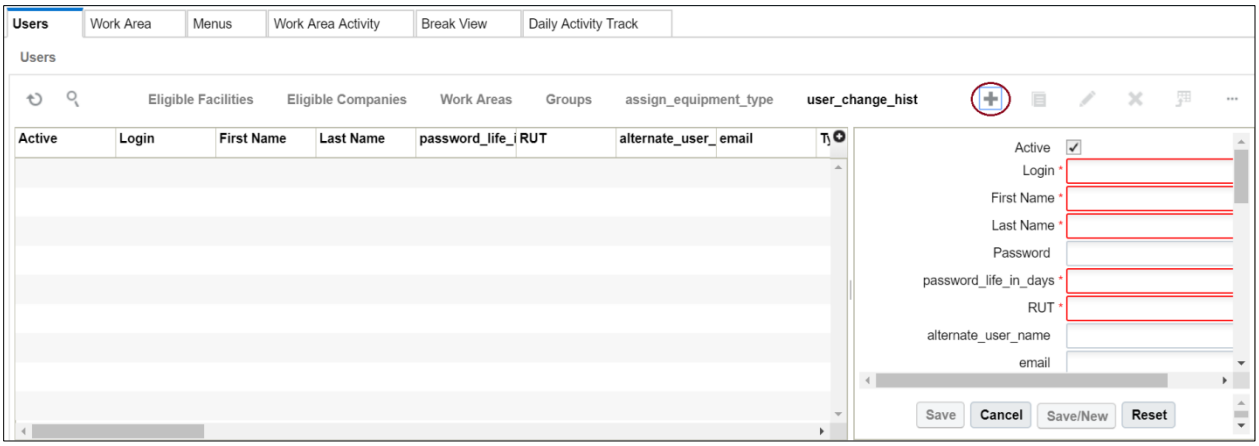

Figure 1-7: Creating New Users

Notes for some of the key fields

- **RUT**: Unique identifier (alphanumeric). Must be same as defined in WMS for this user
- **Type**: Field used to distinguish between internal and external users.
- **Facility**: Defines the default Facility that the user is displayed upon login.
- **Company**: Defines the default company that the user is displayed upon login.
- **Shift**: Defines the user's shift, if applicable. Shifts are created in the Shifts screen, which defines the start and end time.
- **Role**: Defines the user's role in the warehouse. Each role has a different set of permissions for viewing reports in Oracle Workforce Management Cloud (UI permissions only).
- **Language**: Sets the user's language (English or Spanish).
- **Default Group**: Defines the default group that is displayed when this user logs in. Users can be assigned to multiple groups via the Groups button. If a user is assigned to multiple groups, user can switch Group views by clicking the drop-down next to his name on the top right and then clicking View, and finally selecting the desired Group.

3. Click **Save** when done.
4. To configure the Facilities and Companies that the user needs to have access to, select the user and click the **Eligible Facilities/Eligible Companies** buttons. This takes you to the respective views that lists all the facilities/companies.

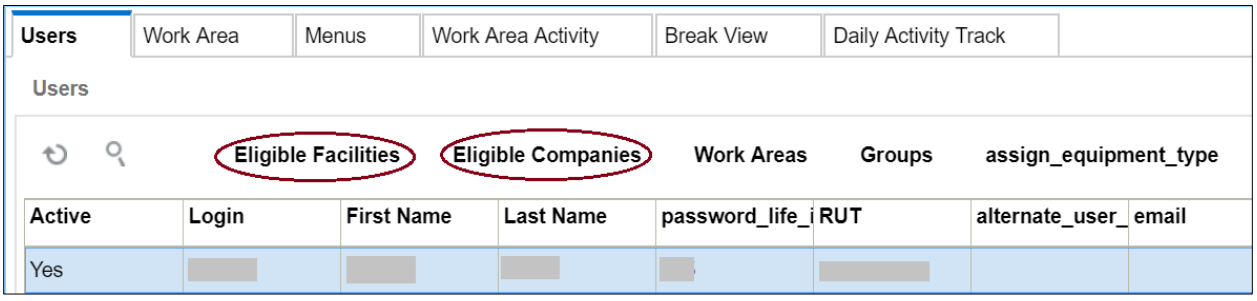

Figure 1-8: Adding User's Eligible Facilities/Companies

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5. Click the **Create** + button to add new Facilities or Companies.

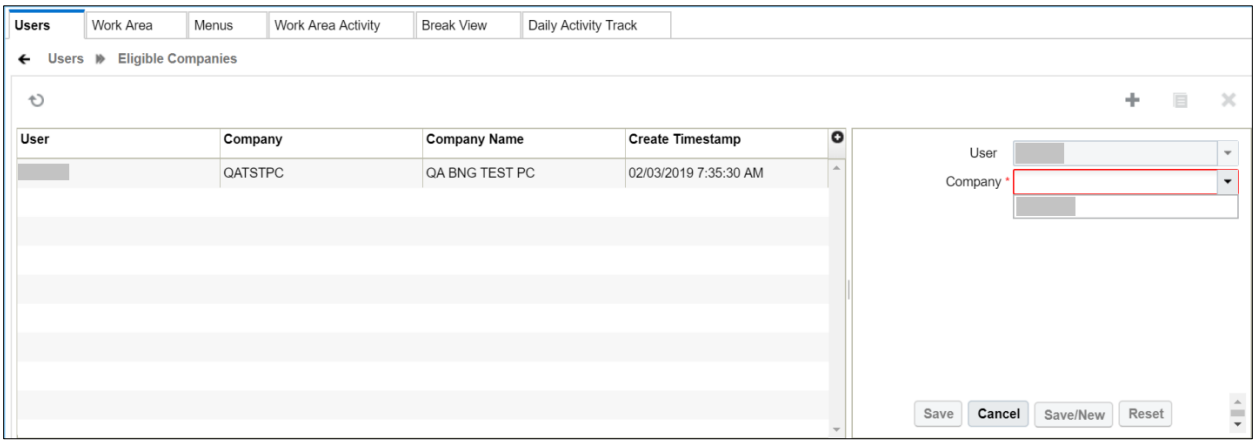

Figure 1-9: Adding user's eligible companies

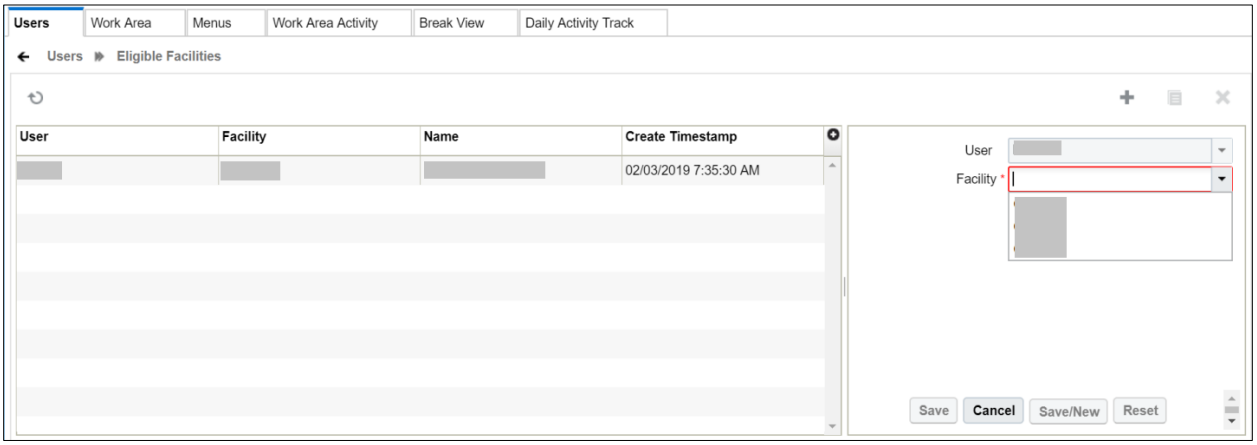

Figure 1-10: Adding user's eligible facilities

6. When finished, return to the main screen.
7. To assign Equipment Types to a user:
    a. Select user.
    b. Click on **assign_equipment_type.**
    c. Select an **Equipment Type** from the drop-down menu.
    d. Click on **submit**.

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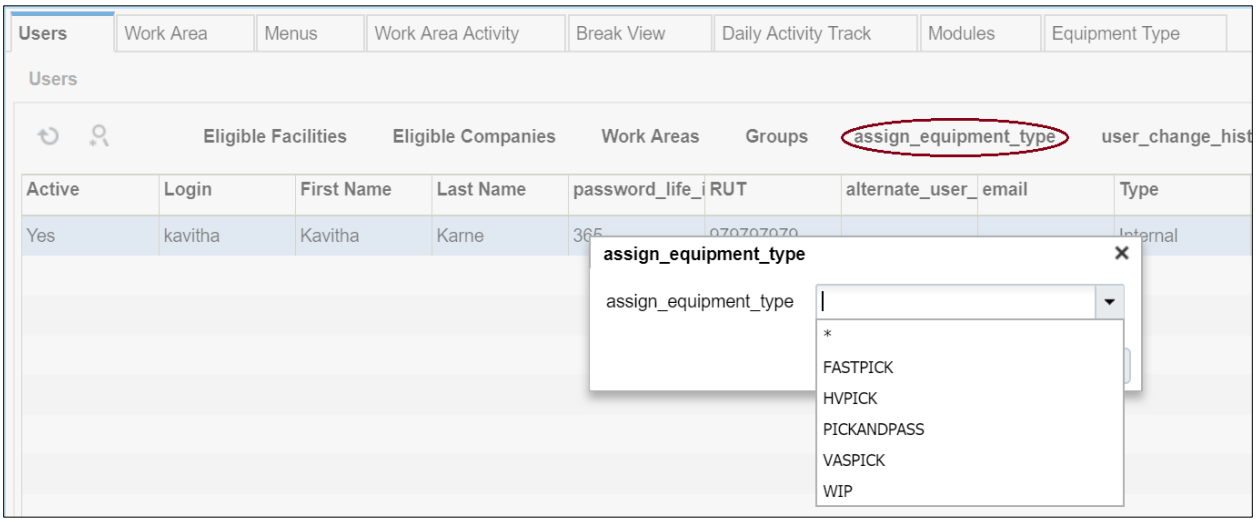

Figure 1-11: Assigning Equipment Types to a user

Note: Equipment Types must be first defined in the Equipment Types screen before assigning them to users.

1.2.5 Configuring Menus for Users

There are five steps to add Group menus.

- Creating UI and RF Screens
- Adding Screens to different Menus
- Assigning Menus to Groups
- Assigning Groups to Users
- Creating and Assigning Facilities & Companies to Users

Creating UI and RF Screens

1. On the Screens UI view, click **Generate Screens**.
2. Select all the necessary screens for the Group (eg. Productivity Report, Break Report etc.).
3. Add both UI and RF screens.

   Note: For RF menus, extra configuration might be required (RF module parameters). To modify its parameters, select the RF screen and click the **Details** button.

4. Click **Save** when done.

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Adding Screens to Different Menus

On the Menus view, create a new menu, one for the UI and one for the RF using the **Create** + button:

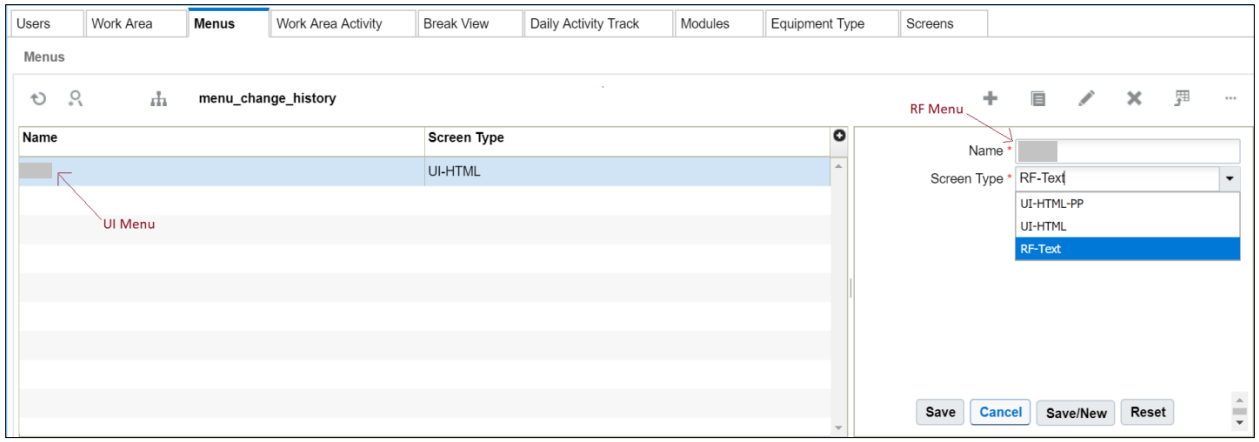

Figure 1-12: Creating UI and RF Menu

Select each menu and click on the **Details** button. To insert screens under each menu, use the **Insert Screen** button. However, if you need additional levels under each main UI and RF menu, you could use **Insert Menu** button.

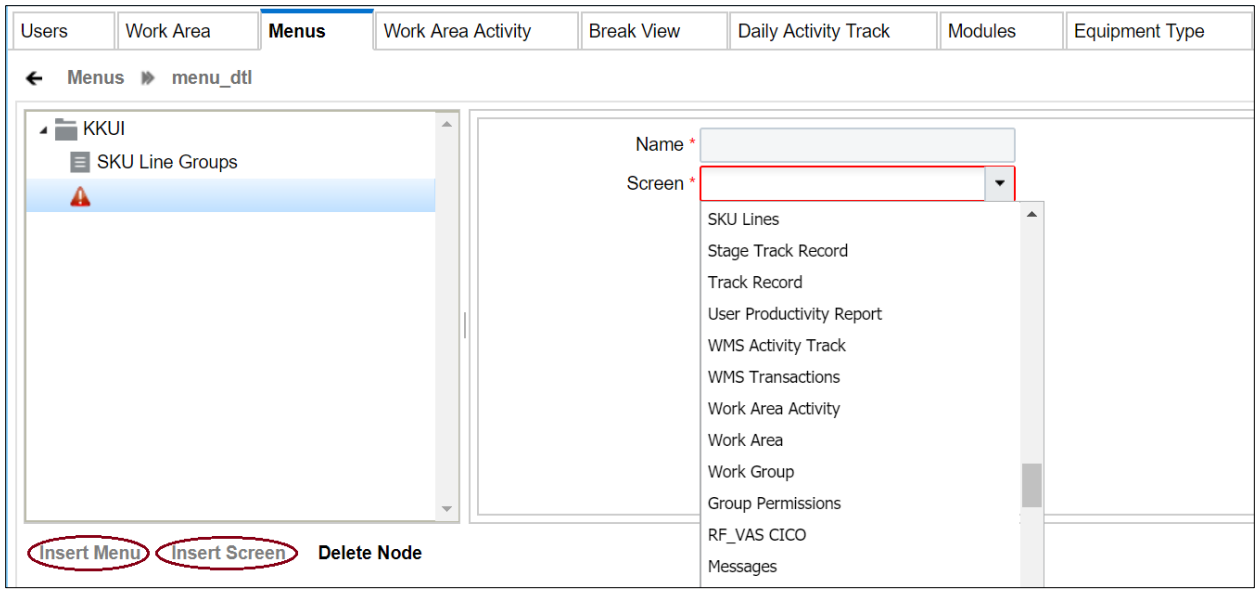

Figure 1-13: Adding Menus/Screens to UI and RF Main Menu

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Assigning Menus to Groups

Once the Menus have been set up, it is now time to add them to Groups. On the Groups screen:

1. Click the **Create** ✚ button to create a new group.
2. Type in the group name.
3. Select the UI/RF menus from the drop-down menus.
4. Click **Save**.

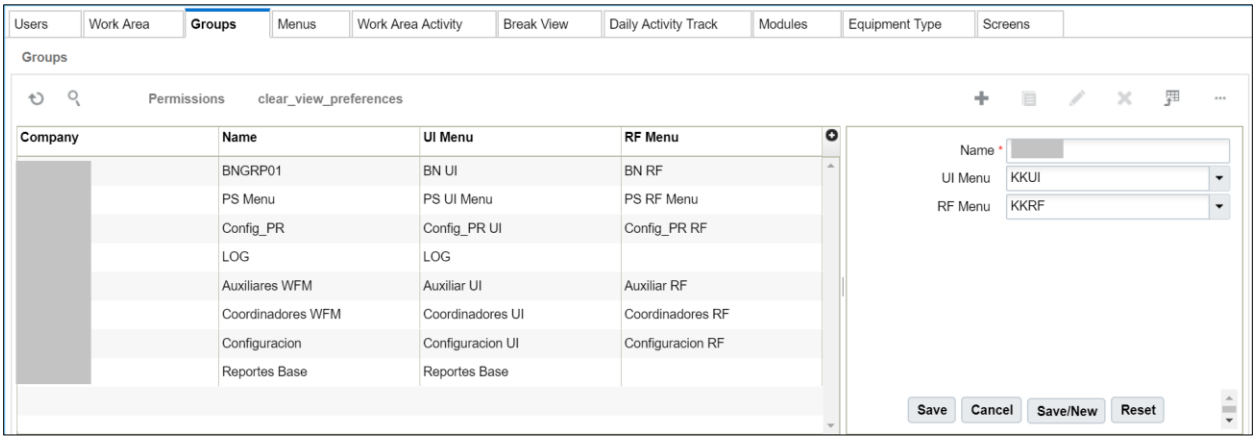

Figure 1-14: Creating a new group

You can use the Permissions button to assign specific permissions to a group. This takes you to a new view where you can choose permission for each screen for this group.

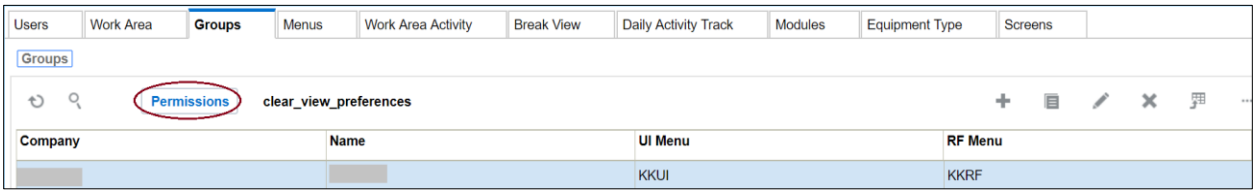

Figure 1-15A: Assigning Permissions to a group

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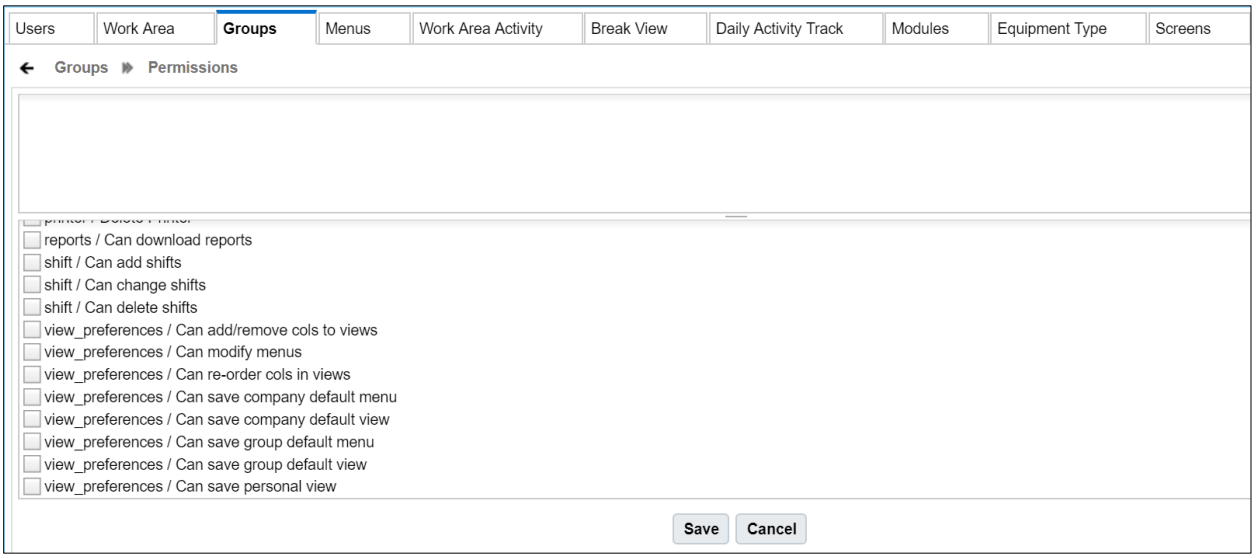

Figure 1-15B: List of Permissions

Assigning Groups to Users

Now that Groups have been created, you now add users to each group. On the User screen:

1. Select a user to assign to a group.
2. Click on **Groups**.
3. Using the Create + button, add the Group(s) to assign the user to the Group.

Creating and Assigning Facilities & Companies to Users

Facilities and Companies in Oracle Workforce Management Cloud need to match the facilities and companies in Oracle WMS.

To create companies, on the Companies screen:

1. Click the **Create** + button.
2. Populate the company's information such as the Code, Name, and Address.

   Note: The first company is the parent company in the environment by default. The Parent Company has the same code in the Parent Company Column OR has a *.

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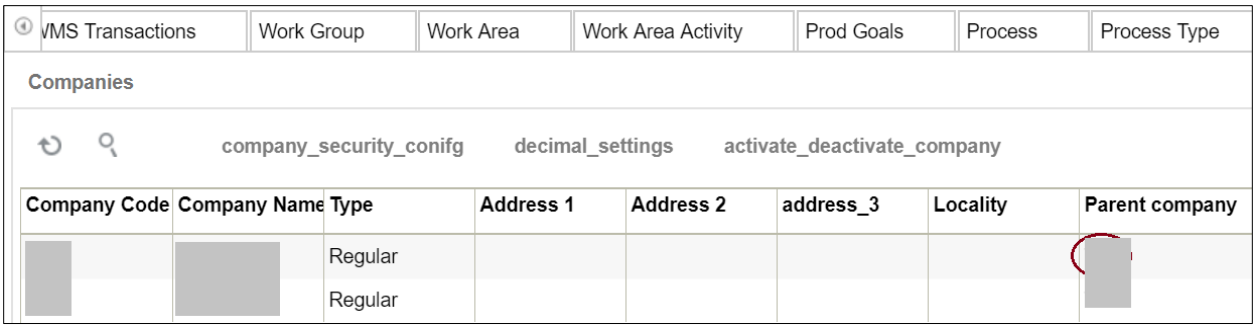

Figure 1-16: Parent and child companies

3. Click **Save** when complete.

Facilities are controlled at the company level. This means that every company has its own set of facilities. This link is defined in the Parent Company column in the Facilities screen.

To Create Facilities, on the Facilities screen:

1. Click the Create ✚ button.
2. Populate the facility's information such as the Code, Name, and Address.

Functional Field Descriptions for Facilities

- **Parent Company**: Denotes the company that the facility belongs to.

Once the Companies and Facilities have been created, the next task is to assign them to users. This was described under the Creating Users section.

1.3 System Integration Framework

Oracle Workforce Management Cloud uses the following methods for processing interface files into Oracle Workforce Management Cloud:

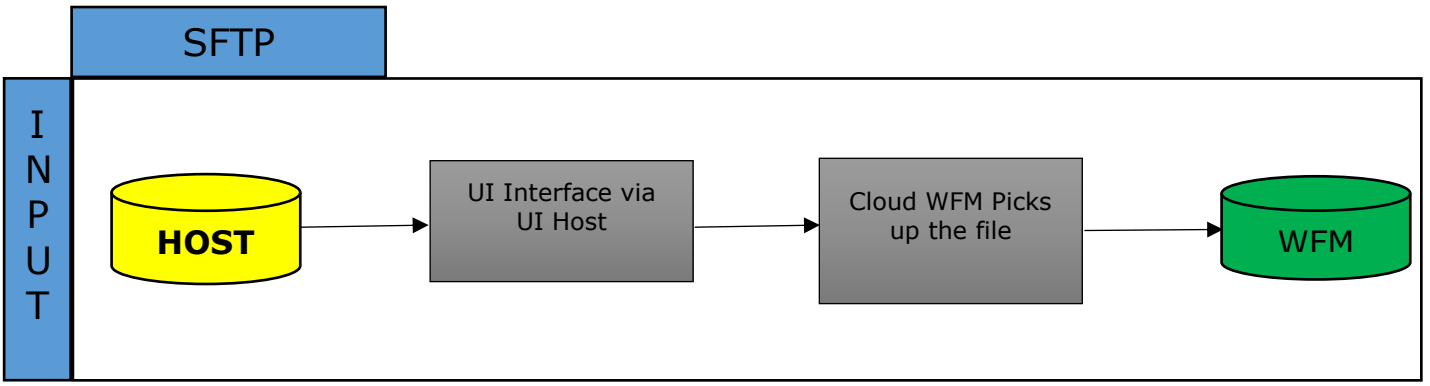

Figure 1-17: SFTP Method in Oracle Workforce Management Cloud

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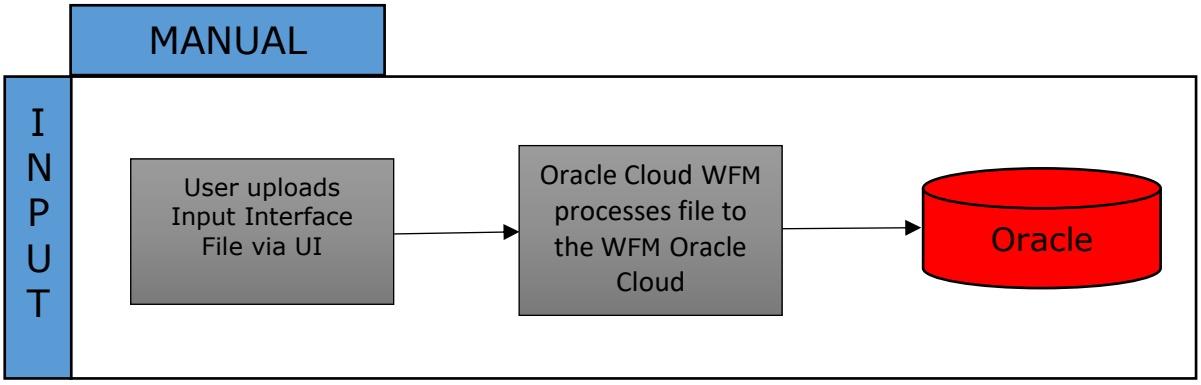

Figure 1-18: Interfacing Methods in Oracle Workforce Management Cloud

1.3.1 Supported Formats

Oracle Workforce Management Cloud supports the following formats with interfaces:

- Flat files
- XML files
- CSV files
- XLS files

1.3.2 Input Interfaces

- User
- Sku Lines
- Prod Goal Line
- Prod Goal VAS
- Clock

1.3.3 Uploading Interface Files with Oracle Workforce Management Cloud

If you are manually preparing the input interface file via Excel, it is important to follow these best practices:

- The filename must start with the phrase as specified in the Input File Formats document (the filename must begin with USR for uploading User files).
- The columns specified as required in the interface specification document must be populated.
- You must populate the correct sequence in the seq_nbr field (i.e. no duplicate values).

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2. Clock In/Out

2.1 What is Clock In/Out?

Clocking is a process that is done in order to ensure that the time stamps of every user entering and exiting the Warehouse/facility is captured in WFM. It also captures the user's entry and exit into Work Areas, VAS activities, Manual activities, and Break.

WFM provides multiple options of clocking in and clocking out. If a 3rd party time management system is used by the warehouse, user's exit into and out of the facility can also be interfaced from this system into WFM as the facility clock-in/clock out time.

Note: If users do not clock in/out, then WFM will fail to report user activities appropriately.

2.2 UI Clock Screen

The user can select an option in the clocking mode to clock in/out, and once all parameters have been selected using the drop-downs, he can click clock in/out.

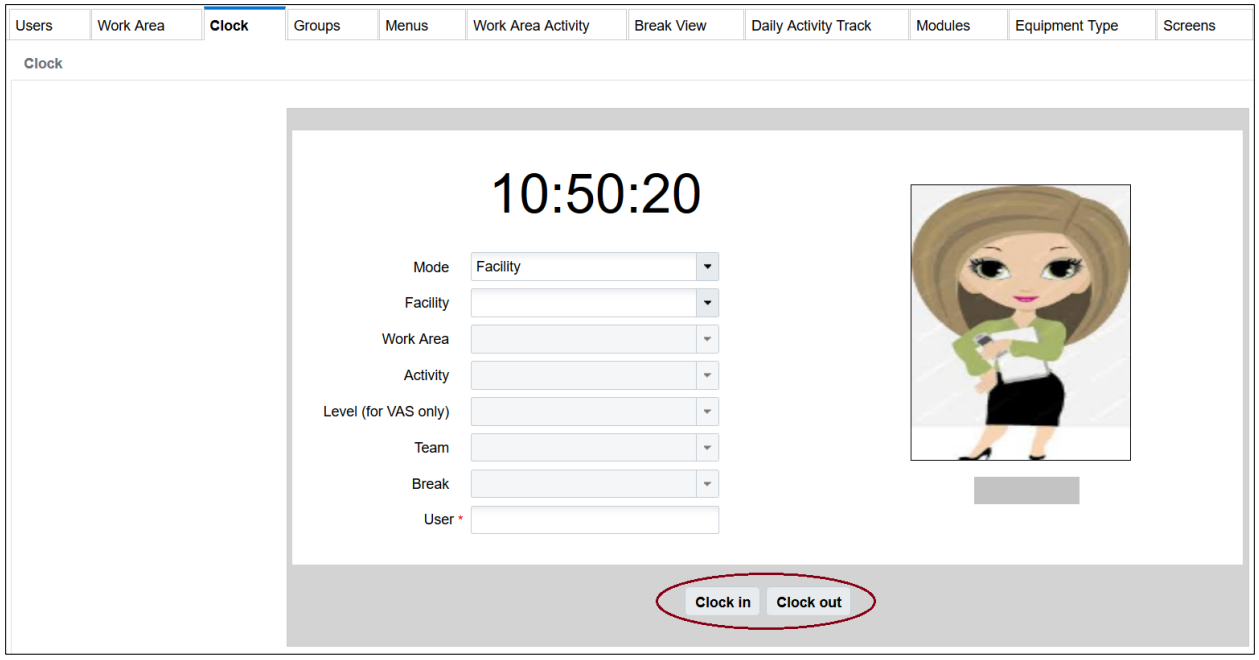

Figure 2-1: UI- Clock Screen

2.3 Clocking Process Flow

Users are required to follow a specific clock-in/clock out process. The following figure depicts a typical clock-in/out flow assuming that the user is performing activity in a single work area on this day.

Every user has to clock into (CI) the facility (FAC) when he/she enters the warehouse/building. As the next logical step, the user needs to clock into the Work Area (WA) where the user will start performing his warehouse activities (WAA – Work Area Activities). If the user needs to step out for lunch or tea breaks, he needs to clock in/out to indicate that to WFM. Finally he needs to clock (CO) of the Work Area and from the Facility.

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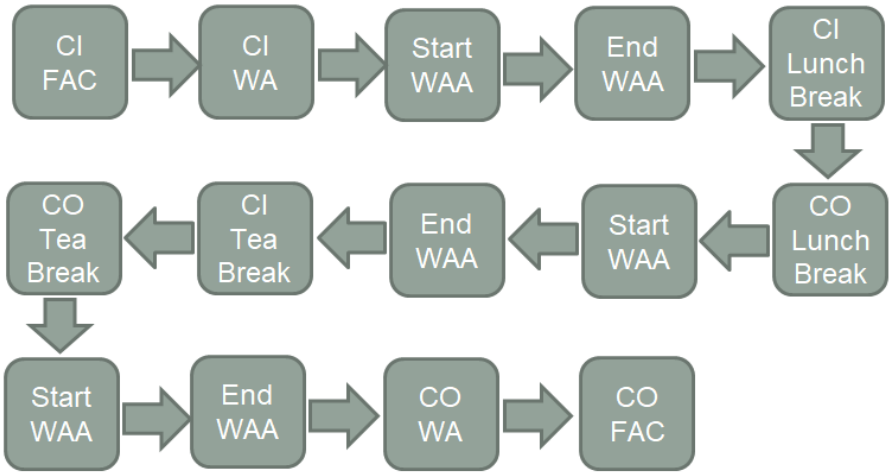

Figure 2-2: Clocking Process Flow

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3. Integration of WMS with WFM

3.1 WMS Activity

For transactions to move from WMS to WFM, the Facility parameter "WRITE_WMS_ACTIVITY_RECORD" in WMS must be set to "YES". This parameter allows transaction details to be logged in the WMS_ACTIVITY tables in WMS database. Transaction data will remain in these tables only for a brief period of time, since it must be purged from time to time so as not to impair the performance of the WMS.

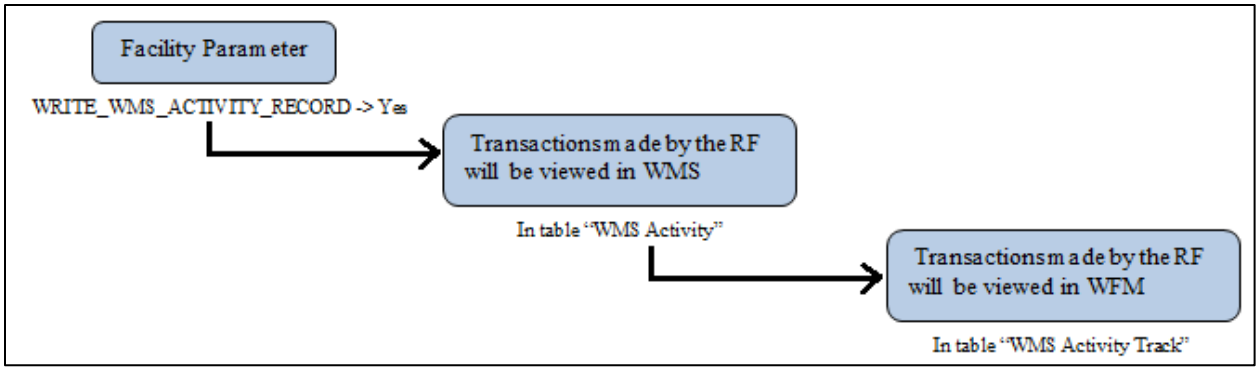

Figure 3-3-1: UI – WMS Activity

One of the integration touch points between the WMS and WFM is the "SKU Line" which is used for grouping of articles with reasonably similar physical characteristics that is created to segment the item master. The SKU LINE can take any field that comes within the item master that is sent by interface. To have the SKU LINE field in the WMS, the company parameter "ITEM_INTF_SKU_LINE_MAP_FIELD", used with the name of the field selected in the item master.

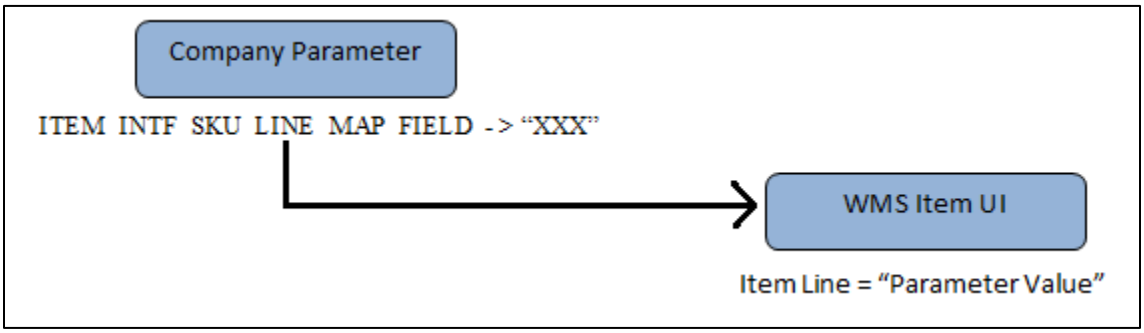

Figure 3-3-2: UI – SKU_LINE

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3.2 Data Flow from WMS to WFM using ETL

The ETL SCRIPT can be scheduled run and fetch WMS Activity data based on the customer's requirement from WMS to the WFM.

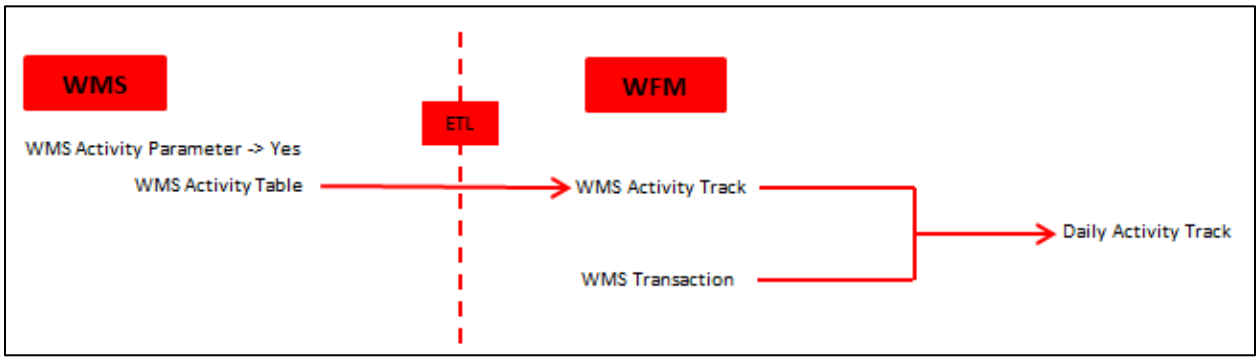

Figure 3-3-3: UI – Data flow from WMS to WFM

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4. WFM Reports

There are several reports in WFM that help to provide information regarding users and their productivity.

A few sample reports are as below:

Daily Report

This report provides visibility of:

- Time the usersclock into and out of the facility
- Time the users clock into and out of different work areas
- Time spent on lunch and tea/coffee breaks

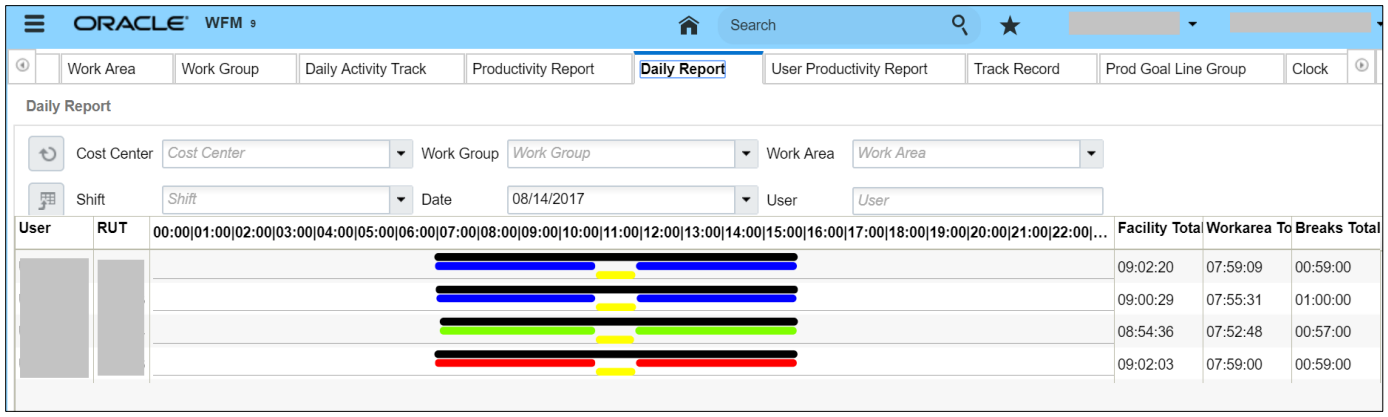

Figure 4 – 1: Daily Report

Break Report

This report compares the time users take for each break against the time allocated for breaks.

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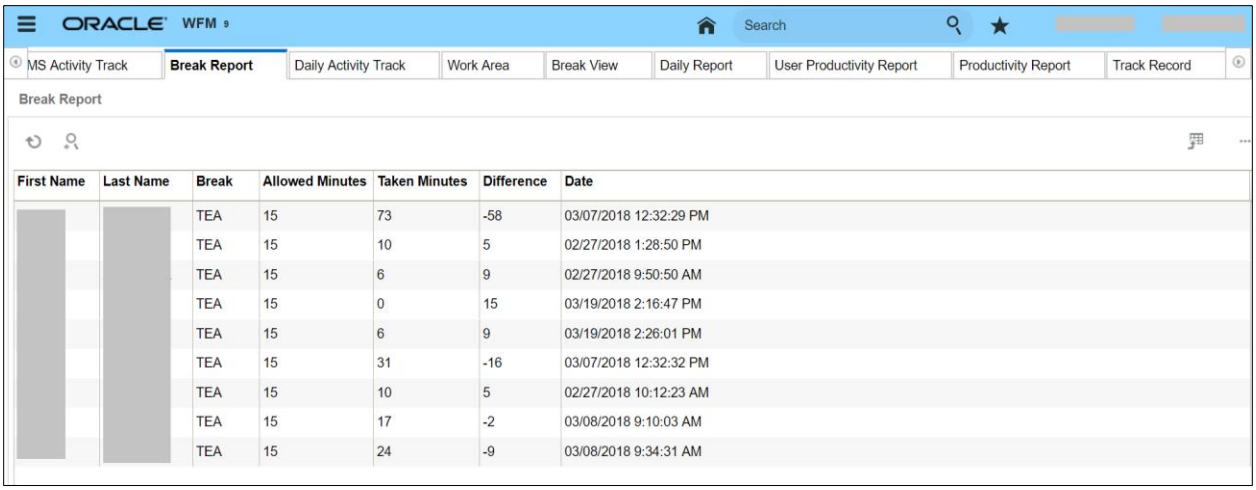
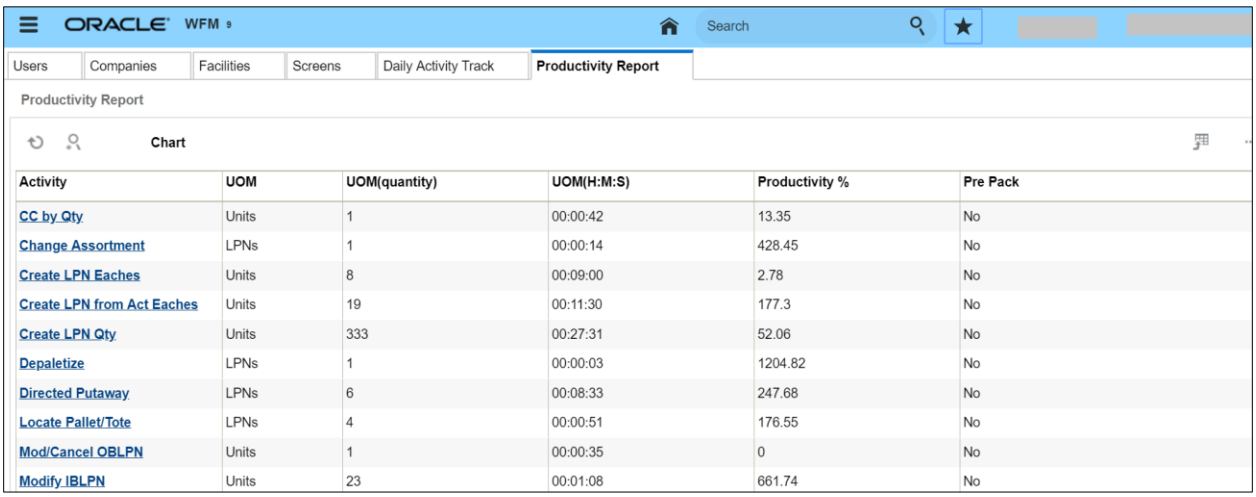


First Name	Last Name	Break	Allowed Minutes	Taken Minutes	Difference	Date
		TEA	15	73	-58	03/07/2018 12:32:29 PM
		TEA	15	10	5	02/27/2018 1:28:50 PM
		TEA	15	6	9	02/27/2018 9:50:50 AM
		TEA	15	0	15	03/19/2018 2:16:47 PM
		TEA	15	6	9	03/19/2018 2:26:01 PM
		TEA	15	31	-16	03/07/2018 12:32:32 PM
		TEA	15	10	5	02/27/2018 10:12:23 AM
		TEA	15	17	-2	03/08/2018 9:10:03 AM
		TEA	15	24	-9	03/08/2018 9:34:31 AM

Figure 4-2 : Break Report

Productivity Report

This report shows the total productivity of users grouped by activities. Each of these activities can be further drilled down to list users that worked on each activity and drilled to a second level to list all SKU lines that each user worked on.



Activity	UOM	UOM(quantity)	UOM(H:M:S)	Productivity %	Pre Pack
CC by Qty	Units	1	00:00:42	13.35	No
Change Assortment	LPNs	1	00:00:14	428.45	No
Create LPN Eaches	Units	8	00:09:00	2.78	No
Create LPN from Act Eaches	Units	19	00:11:30	177.3	No
Create LPN Qty	Units	333	00:27:31	52.06	No
Depaletize	LPNs	1	00:00:03	1204.82	No
Directed Putaway	LPNs	6	00:08:33	247.68	No
Locate Pallet/Tote	LPNs	4	00:00:51	176.55	No
Mod/Cancel OBLPN	Units	1	00:00:35	0	No
Modify IBLPN	Units	23	00:01:08	661.74	No

Figure 4-3: Productivity Report

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5. Appendix

4.1 Roles and Permissions

PERMISSIONS FOR ROLE: ADMINISTRATOR				
Add company	10	Add facility	19	Save company menu
Delete company	11	Change facility	20	Save group menu
Change company	12	Delete facility	21	Modify view columns
Add user	13	Modify view columns	22	Reorder view columns
Delete user	14	Reorder view columns	23	Save group view
Change user	15	Save company view	24	Save user view
Add group	16	Save group view	25	Modify menus
Delete group	17	Save user view	26	Save company menu
Change group	18	Modify menus	27	Save group menu.

Note: By default, Administrators have access to all companies that the facility is eligible to access.

PERMISSIONS FOR ROLE: MANAGEMENT			
1	Change user	10	Modify menus
2	Add user	11	Save group menu
3	Add facility	12	Modify view columns
4	Change facility	13	Reorder view columns
5	Delete facility	14	Save group view
6	Modify view columns	15	Save user view
7	Reorder view columns	16	Modify menus
8	Save group view	17	Save group menu.
9	Save user view		

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PERMISSIONS FOR ROLE: SUPERVISOR			
1	Change user	5	Save group view
2	Change facility	6	Save user view
3	Modify view column	7	Modify menus
4	Reorder view columns	8	Save group menu.

PERMISSIONS FOR ROLE: GUARD	
1	Read-only access; users cannot create, copy, edit or delete.

PERMISSIONS FOR ROLE: EMPLOYEE	
1	Read-only access; users cannot create, copy, edit or delete.

Note: These permissions apply for the UI screens only; RF permissions are not affected.

4.2 Clocking Modes

Clocking Modes	
1	Facility
2	Work Area
3	VAS
4	Manual
5	Break

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