Oracle® Fusion Cloud EPM

Administering and Working with Strategic Workforce Planning

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1

Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Oracle Fusion Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: Introduction to EPM Center of Excellence.

Learn More

- Watch the Cloud Customer Connect webinar: Creating and Running a Center of Excellence (CoE) for Cloud EPM
- Watch the videos: Overview: EPM Center of Excellence and Creating a Center of Excellence.
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.

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2

Welcome to Strategic Workforce Planning

About Strategic Workforce Planning

Strategic Workforce Planning translates long-term corporate strategy into execution plans by ensuring that the strategy is supported by the right workforce: the right skill sets and headcount at the right time.

You look at long-term demand for resources by exploring scenarios that impact those demands. You also look at what's going to happen with your current workforce, for example, through retirement or natural attrition. Evaluating demand against supply helps you understand what gaps there may be, whether positive or negative, so that you can proactively plan for needed resources. You can anticipate the headcount and skills needed to support your business strategy.

Strategic Workforce Planning provides configurable drivers that enable planners to answer such questions as, "Do our employees have the right skill sets and are they in the right roles to accomplish future plans?".

To plan future workforce needs, you define strategic demand drivers such as:

- Expected revenue
- Manufactured goods
- Number of calls to a call center
- Number of invoices to process
- Insurance claims to process

You select the best calculation logic for each driver, which translates driver values into future long-term full time equivalents (FTEs).

Watch this overview video to learn about Strategic Workforce Planning:

Overview Video

You can also enable Workforce to manage and track headcount expenses. You can then align critical corporate resources—people and dollars—with the strategies that best leverage a competitive advantage. Departments can collaborate to plan headcount and related expenses such as salaries, benefits, bonuses, and taxes. Planners can see up-to-date graphics that show expenses and trends.

If Workforce is enabled with all its features, planners can manage and track headcount expenses:

- Analyze, calculate, and report on headcount, salary, bonuses, taxes, and health care expenses
- Plan for hires, transfers, promotions, terminations, and so on
- Define country-appropriate taxes and benefits

These components help you to meet your workforce planning needs:

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- Compensation Planning
- Other Expenses
- Demographics
- Analysis

Learning More About Strategic Workforce Planning

Oracle offers various resources to help you learn more.

To get more information or help about Strategic Workforce Planning and related services:

- Click **Academy** on the Home page.
- To get Help, click the arrow next to your user icon in the upper right corner of the screen, and then click **Help**.
- See these Related Guides.

Related Guides

You can extend the power and flexibility of Strategic Workforce Planning. See these guides.

Strategic Workforce Planning belongs to the Oracle Fusion Human Capital Management (HCM) family, integrating with its services through Data Management. For information on integrating Human Capital Management with Strategic Workforce Planning or Workforce, see Integrating Oracle HCM Cloud.

Strategic Workforce Planning is also supported by the many Oracle Fusion Cloud Enterprise Performance Management components.

Getting Started

To get started using Strategic Workforce Planning, see these guides:

- Getting Started for Administrators
- Getting Started for Users
- Deploying and Administering Oracle Smart View for Office (Mac and Browser)
- Creating and Running an EPM Center of Excellence
- Getting Started with the Digital Assistant for Oracle Cloud Enterprise Performance Management
- Oracle Enterprise Performance Management Cloud Operations Guide

To extend the power and flexibility of Strategic Workforce Planning, see the following guides. Note that some functionality described in the related guides may not be available in Strategic Workforce Planning. For example, Strategic Workforce Planning provides custom cubes and includes features to support strategic planning for human resources needs.

Design

- Designing with Calculation Manager

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- Designing with Financial Reporting Web Studio
- Designing with Reports for Oracle Enterprise Performance Management Cloud

User

- Working with Planning
- Working with Smart View
- Working with Oracle Smart View for Office (Mac and Browser)
- Working with Predictive Planning in Smart View
- Working with Financial Reporting
- Working with Reports for Oracle Enterprise Performance Management Cloud
- Accessibility Guide

Administration

- Administering Planning
- Administering Data Management
- Administering Data Integration
- Administering Access Control
- Administering Migration
- Working with EPM Automate
- Third-Party Acknowledgments

Development

- Java API Reference for Groovy Rules
- REST API
- Smart View for Office Developer's Guide

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Part I

Administering Strategic Workforce Planning

Maintaining Your Application

As your business changes, continue to update drivers, accounts, users, and so on to keep your application up to date.

You can easily perform these tasks by returning to the Configuration tasks.

On a monthly basis, you must update the current planning period:

1. From the Home page, click **Application**, then **Configure**, and then select a module.
2. From the **Configure** page, select **Planning and Forecast Preparation**.
3. Select the current planning month from the **Period** list and then click **Save**.

Managing Alias Tables

When you enable a Planning module, alias tables are loaded only for the default language, rather than for all of the supported languages.

For new applications, after you enable a module, you can use a new option, **Manage Seeded Alias Tables**, to load alias tables for other languages.

For existing applications, you can remove alias tables for languages you don't need.

To add or delete alias tables:

1. From the Navigator, under **Create and Manage**, click **Alias Tables**.
2. From the **Actions** menu, click **Manage Seeded Alias Tables** (available after you have enabled a module).
3. Select the languages you want to load, or clear the selection for languages you want to delete and then click **OK**.
4. After the languages load, refresh the cube.

Notes about managing alias tables.

- You can load up to 30 alias tables in Planning Modules.
- When you incrementally enable features or new modules, alias tables are loaded for your selected languages for any new members.
- If you've customized any labels in an alias table, those customizations are applied to any new members added when you incrementally enable features.

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Setting Up Your Application

Implementation Checklist

This implementation checklist helps you get started in setting up your Strategic Workforce Planning application.

Perform these tasks to set up Strategic Workforce Planning:

1. Create a Strategic Workforce Planning application. See Creating an Application.
2. If your application is multicurrency, use the Dimension Editor to add dimension members for each currency. See About Editing Dimensions in the Simplified Dimension Editor.
3. Enable features for Strategic Workforce Planning. See Enabling Strategic Workforce Planning.

   Your selections for **Granularity** and **Employee Demographics** are set when you enable Strategic Workforce Planning and are also used if you later enable Workforce. Additionally, make sure you add any required custom dimensions or rename dimensions while enabling Strategic Workforce Planning. These dimensions will also be used if you enable Workforce.

   While you are enabling features, the application is put in maintenance mode and only administrators can use the application. If any metadata changes are detected, the database is refreshed before features are enabled. If any validation errors are detected, they are displayed; you must resolve these errors before features can be enabled.
4. Configure Strategic Workforce Planning. See Configuring Strategic Workforce Planning.

   You must configure **Demand Drivers** and **Valid Intersections for Jobs**.

   The planning and forecast range (configured in **Planning and Forecast Preparation**) can be different for Strategic Workforce Planning and Workforce. For example, you might want to use Strategic Workforce Planning for long-term planning and Workforce for short-term planning.
5. After you configure, and whenever you make configuration changes or import metadata, refresh the database:

   Click **Application** , and then **Configure** . Then from the **Actions** menu, select **Refresh Database**, then **Create**, and then **Refresh Database**.
6. Enable any additional features you need for Workforce. See Enabling Workforce Features.

   Your selections for **Granularity** and **Employee Demographics** are set when you enable Strategic Workforce Planning and are also used when you enable Workforce.

   If you already enabled Strategic Workforce Planning, you can't add any additional dimensions or rename dimensions.
7. Configure Workforce. See Configuring Workforce.

   The planning and forecast range (configured in **Planning and Forecast Preparation**) can be different for Strategic Workforce Planning and Workforce.

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For other configuration tasks, if you've already configured them in Strategic Workforce Planning, you don't also have to configure them again in Workforce.

8. After you configure, and whenever you make configuration changes or import metadata, refresh the database.
9. Set required user variables. See Setting User Variables.
10. Import data and run **Process Loaded Strategic Workforce Data** for Strategic Workforce Planning and **Process Loaded Data** for Workforce.

    See Importing Data.
11. Create the required user and group accounts and grant permissions. See Getting Started with Oracle Enterprise Performance Management Cloud for Administrators.
12. Make the application available to planners. From the Home page, click **Application** , and then **Settings** . In **System Settings**, change **Enable Use of the Application for** to **All Users**.
13. Use any of the following methods to configure and extend the framework:
    - Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud
    - Designing with Reports for Oracle Enterprise Performance Management Cloud
14. To define the approval process, define the approval units and promotional paths for approving plans in your organization. See Managing Approvals.

Creating an Application

Follow these steps to create a Strategic Workforce Planning application.

To create an application:

1. On the landing page, click **SELECT** under **Planning** to view available options for creating a Planning application. Under **Create a new application**, click **START**. Enter an application name and description, and for **Application Type**, select **Strategic Workforce Planning**, and then click **Next**.

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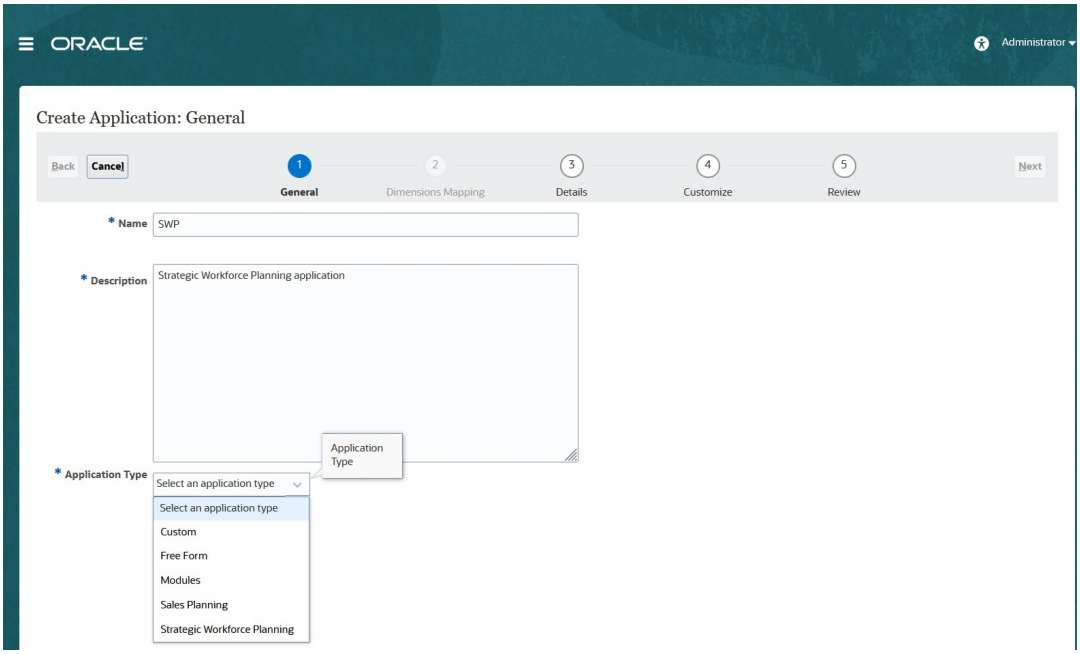

If you are using the legacy Oracle Strategic Workforce Planning Cloud SKU, log in and select **Start** under **Human Capital**. Enter an application name and description and then click **Next**.

2. Specify this information, noting that only monthly planning is supported.

   - **Start and End year**—Years to include in the application. Make sure to include the year that contains the historic actuals required for planning and analysis. For example, for an application beginning in 2019, select 2018 as the start year so that the latest actuals are available for trending and reporting purposes.
   - **First Month of Fiscal Year**—Month in which your fiscal year begins.
   - **Weekly Distribution**—Sets the monthly distribution pattern, based on the number of fiscal weeks in a month.

     This selection determines how data in summary time periods spreads within the base time period. When users enter data into summary time periods, such as quarters, the value is distributed over base time periods in the summary time period.

     If you select a weekly distribution pattern other than **Even**, the application treats quarterly values as if they were divided into 13 weeks and distributes weeks according to the selected pattern. For example, if you select **5-4-4**, the first month in a quarter has five weeks, and the last two months in the quarter have four weeks.
   - **Task Flow Type**—Choose a **Task Flow Type** for the application:
     - **Task List**—Task lists are a classic feature which guides users through the planning process by listing tasks, instructions, and end dates.

       For more information about task lists, see Administering Task Lists in *Administering Planning*.
     - **EPM Task Manager**—This is the default option for new applications. EPM Task Manager provides centralized monitoring of all tasks and provides a visible, automated, repeatable system of record for running a application.

       For more information about EPM Task Manager, see Administering Tasks with Task Manager in *Administering Planning*.

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> **Note**
>
> There is no migration from existing Task Lists to the EPM Task Manager. If you want to continue using classic Task Lists, select the **Task List** option during application creation.

- **Main Currency**—For a multicurrency application, this is the default reporting currency and the currency against which exchange rates are loaded.
- **Multicurrency**—Multicurrency support is provided by the Currency dimension and enables planning in different currencies.

  If you select **Multicurrency**, a member called **No <*Member*>** (for example: No Entity, No Period, No Version) is added to all dimensions to store currency information. You can't edit or delete this member.
- **Name of Reporting Cube**—Strategic Workforce Planning delivers an aggregate storage (ASO) reporting cube called **HCMREP**. You can configure the dimensionality of the cube for your reporting requirements.

  An additional ASO cube is created when you enable either Strategic Workforce or Workforce modules.

3. Click **Next**, review your selections, and then click **Create**.

Enabling Essbase Hybrid Block Storage Option (BSO) Cubes

Hybrid BSO cubes support some Aggregate Storage Option (ASO) capabilities in addition to BSO capabilities. Hybrid cubes provide many benefits including smaller database and application size, better cube refresh performance, faster import and export of data, improved performance of business rules, and faster daily maintenance of the business process. To ensure optimal performance, warnings and error messages are displayed during cube refresh if the business process does not conform to best practices.

Beginning with Release 22.04, Strategic Workforce Planning supports Essbase Hybrid Block Storage Option (BSO) cubes. Any new applications you create are automatically created with Hybrid mode enabled.

If you created your application prior to Release 22.04, or if you create a new application using a release provisioned prior to Release 22.04, you can enable Hybrid mode to support Essbase hybrid block storage option (BSO) cubes if it's not already enabled.

To enable Hybrid cubes for existing applications:

1. From the Home page, select **Application** and then **Overview**.
2. From **Actions**, select **Enable Hybrid Mode**.

For more information:

- About Essbase in Cloud EPM in *Getting Started Guide for Administrators*.
- recreate in *Working with EPM Automate*.

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> **Note**
>
> Because Strategic Workforce Planning supports Hybrid cubes, when Hybrid Mode is enabled, you can set up predictions to run automatically with Auto Predict. For more information, see Setting Up Predictions to Run Automatically with Auto Predict. You can also use IPM Insights to analyze past data and predicted data to help you find patterns and insights into data that you might not have found on your own. See About IPM Insights in *Administering Planning*.

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4

Familiarizing Yourself with Strategic Workforce Planning

Navigating in Strategic Workforce Planning

Learn how to easily navigate around the application.

Useful navigation tips:

- To return to the Home page when you've navigated away from it, click the Oracle logo in the upper left corner (or your custom logo) or the Home icon .
- To see additional administrator tasks in the Navigator, click the horizontal bars next to the Oracle logo (or your custom logo) .
- Expand a dashboard to full screen by clicking the Show/Hide bar at the top of the dashboard. Click it again to return to normal view.
- Hover the cursor in the upper right corner of a form or dashboard to see a menu of options appropriate to the context, such as **Actions**, **Save**, **Refresh**, **Settings**, and **Maximize** .
- In a subcomponent, use the horizontal and vertical tabs to switch tasks and categories.

  For example, use the vertical tabs to switch between reviewing Overview dashboards and planning Demand. The vertical tabs differ, depending on the features that you've enabled.

  Use the horizontal tabs to switch categories within a task.

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5

Configuring Strategic Workforce Planning

Enabling Strategic Workforce Planning

Before users can start strategic workforce planning, enable the Strategic Workforce Planning features you want to use.

Based on your selections, the dimensions, drivers, forms, and rules are populated. In most cases, you can come back later and incrementally enable additional features. However, note these exceptions:

- If you want to use **Employee Demographics**, you must select it the first time you enable features.
- You must enable all the dimensions you want to include in the application and rename dimensions the first time you enable using **Map/Rename Dimensions**.

After you enable a feature, you can't later disable it.

Video

Your Goal	Watch This Video
Learn about enabling Strategic Workforce Planning.	Strategic Workforce Planning | Enabling Strategic Workforce Planning Cloud

> **Note**
>
> Enable and configure Strategic Workforce Planning before enabling and configuring Workforce. Your selections for **Granularity** and **Employee Demographics** are set when you enable Strategic Workforce Planning and are also used if you enable Workforce. Make sure you add any required custom dimensions or rename dimensions while enabling Strategic Workforce Planning. These dimensions will also be used if you enable Workforce.

1. From the Home page, click **Application** , and then click **Configure** .
2. From the **Configure** list, select **Strategic Workforce**, and then click **Enable Features**. Select the features you want to enable. Except as noted, you can come back later and enable additional features, so enable only the features you need to use now.

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Table 5-1 Strategic Workforce Planning Enable Features

Feature	Description
Granularity	Select the level of workforce detail to manage. • Select **Job** to manage long-term workforce planning at the job-only level. • Select **Employee and Job** to manage long-term workforce planning by both employees and jobs. You must select a level of granularity. See Identifying the Level of Workforce Detail to Capture.
Headcount Planning	Select which headcount-related details to manage. • Select **Employee Demographics** to analyze employee attributes such as veteran status, gender, or age band. Applies only to **Employee and Job** granularity. If you want to use **Employee Demographics**, you must select it the first time you enable features. • Select **Strategic Workforce Planning** to align corporate strategy with execution by planning long-range demand and supply for strategic personnel, and then select the desired options. If you enable **Strategic Workforce Planning**, then **Demand Planning** and **Supply Planning** are automatically enabled. See Enabling Headcount Planning.
Map/Rename Dimensions	• Enable up to three additional custom dimensions in your application. • Map custom dimensions to existing dimensions. • Rename base dimensions. You must perform this step the first time you enable Strategic Workforce Planning. These dimensions are also used if you enable Workforce. Make sure you add any required custom dimensions or rename dimensions while enabling Strategic Workforce Planning. For example, on the first pass, if you select the top-level **Headcount Planning** checkbox without selecting options under it (such as **Employee Demographics**), and you later enable **Employee Demographics**, you can't rename its associated dimensions **Age Band**, **Gender**, and **Highest Degree of Education**. For some dimensions, you have the option to choose whether or not they go into the reporting cube (OEP_REP). See Adding Custom Dimensions to the Reporting Cube.

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Identifying the Level of Workforce Detail to Capture

You can enrich Workforce to reflect your organization's planning needs.

Your selection for **Granularity** in Strategic Workforce Planning is also used if you enable Workforce. You can rename **Job** or **Employee and Job** in **Map/Rename Dimensions**.

To help you decide the granularity you want:

Table 5-2 Overview of Granularity Level

Option	Description
Job	If you select **Job**, the Job dimension is added, which stores the roles assigned to employees. Examples of jobs: Engineer, Software Developer, and Mechanic. If you select this option, you must set defaults for Pay Type and Skill Set. Or, if you don't use this information, set them to null (the No *<member name>*). See Setting Defaults.
Employee and Job	With this option, the Job dimension is used with the Employee dimension to facilitate analysis of roles across the organization, to track new hire requests, and to identify employees by role. If you select this option, you must assign defaults for Job and Union Code. See Setting Defaults. If you don't track Union Codes, you can use the No Union Code member or change Union Code to something that's meaningful to your business. **Note:** If you rename Union Code when enabling Workforce, you must still assign a default for the renamed dimension.

Enabling Headcount Planning

If you enable **Strategic Workforce**, then **Demand Planning** and **Supply Planning** are automatically enabled. Select from these features:

- **Employee Demographics**—Select to analyze such employee attributes as veteran status, gender, and age band. If you want to use **Employee Demographics**, you must select it the first time you enable features. Available only for **Employee and Job** granularity.
- **Demand Planning**—Enables you to look at the long-term demand for strategic jobs, based on custom demand drivers that align with your corporate goals. Some examples of demand drivers: revenue, units manufactured, and claims processed.
  Because demand drivers vary by industry, Strategic Workforce Planning includes no predefined demand drivers. Instead, you configure as many as you need using the **Demand Driver** configuration task. You can manually add or import demand drivers.

  As part of **Demand Planning**, you can also enable:

  – **Demand Driver Scaling Factor**—Enables planners to scale demand planning to account for a change in efficiency over time. That is, you can accomplish more with the same number of people. Setting the Demand Scale enables planners to increase the demand driver without increasing the resources needed using the same ratio. For

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example, you expect Call Center Operators to handle more calls in the future because they're more experienced. See Scaling Demand FTE.

If **Demand Driver Scaling Factor** is enabled, but no scaling factor data is entered on the form, 100% is assumed in demand calculations.

  - **Expected Productivity Gains Factor**—Enables planners to account for the impact on the productivity of FTE beyond that of Demand Scale. For example, you plan to improve a process or buy technology that improves productivity and reduces the impact on Demand FTE. Perhaps a new automated system is expected to improve productivity 5% over last year. If you set Expected Productivity to 5% of the previous year's ratio, then doubling the number of calls requires only 95% of the previous year's ratio to meet the demand. See Factoring Productivity Changes into Demand FTE.

- **Supply Planning**—Enables you to assess your supply of personnel using attrition drivers. For example, you can assess your workforce using drivers such as **Attrition by Age Band** or **Attrition by Job**. If you enable **Age Based Retirement**, supply calculations can factor age-based retirement into attrition calculations. Because retirement is employee-specific, this option is available only for the **Employee and Job** level of granularity.
- **Skills Assessment**—Enables you to analyze and plan for skill proficiencies. Examples of skills you might add: Project Management or Java coding. Because skills are specific to employees, this option is available only for the **Employee and Job** level of granularity.
- **Average Compensation**—Enables you to base supply and demand compensation calculations for jobs on an average compensation rate. You can load or specify the rates. You can define whether average compensation includes salary, additional earnings, benefits, and taxes.
  To ensure correct supply and demand compensation calculations, import average compensation rates for jobs into the No_Currency member.

Configuring Strategic Workforce Planning

You configure Strategic Workforce Planning after you've enabled its features. Your Configure options depend on the features you enabled. The options import members (metadata) into the dimensions that were created when you enabled features.

After performing a configuration task, click **Actions** and then **Refresh Database** to update the application.

Video

Your Goal	Watch This Video
Learn about configuring Strategic Workforce Planning.	Strategic Workforce Planning | Configuring Strategic Workforce Planning Cloud

1. From the Home page, click **Application** , and then click **Configure**
2. From the **Configure** list, select **Strategic Workforce**.
3. Perform all mandatory tasks. Perform the optional tasks required for your business.
4. Refresh the application after performing configuration tasks.

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Table 5-3 Strategic Workforce Planning Configuration Tasks

Configure	Description
Entities	Mandatory Import the Entity dimension members that reflect your business hierarchy, such as departments, cost centers, and business units. Entities are shared between Strategic Workforce Planning and Workforce.
Planning and Forecast Preparation	Mandatory Set the timeframe and the starting period for planning and forecasting. You can plan and forecast on a different basis for different years. The planning and forecast range can be different for Strategic Workforce Planning and Workforce. For example, you might want to use Strategic Workforce Planning for long-term planning and Workforce for short-term planning. See Strategic Workforce Planning Planning and Forecast Preparation.
Employee	Optional Import employee names or employee numbers in your organization as members into the Employee dimension.
Job Type	Mandatory Import job types. For example, add members such as Strategic Jobs and Non Strategic Jobs. Only jobs that you identify as strategic are included in calculations that impact strategic decisions. Because different departments have different workforce requirements, when you categorize a job as strategic, you can include specific entities or departments. Then you associate the job types with each job using the **Job** configure option.
Job	Optional Import jobs in your organization as members into the Job dimension.

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Table 5-3 (Cont.) Strategic Workforce Planning Configuration Tasks

Configure	Description
Employee Demographics	Optional Set up employee demographics such as Highest Education Level. Demographics enable you to analyze data based on individual employee characteristics. You can select, add, import, or export a demographic, such as ethnic group. If you enable Employee Demographics, Strategic Workforce Planning provides the Gender, Age Band, and Highest Education Degree attributes, and you can add employee demographics such as veteran status. You typically import demographic attributes for existing employees, and planners assign demographics after new employees are hired. Strategic Workforce Planning provides data maps for reporting on such information as demographics. See Adding and Managing Accounts and Drivers.
Employee Properties	Optional Set up employee properties such as Employee Type. Add, import, or export properties such as Skill Set, FT/PT, Start Month, Merit Month, and Hiring Status. Then to view and edit employee properties, use **Compensation Planning**, then the **Manage Employee Details** tab. See Adding and Managing Accounts and Drivers.
Gender	Optional Import members into the Gender dimension
Highest Education Degree	Optional Import highest education degrees used in your organization by importing members into the Highest Education Degree dimension.
Age Band	Optional Import members into the Age Band dimension. Employees' ages are calculated and assigned to an age band as it changes over time. Oracle recommends that you use the default age bands instead of loading your own.

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Table 5-3 (Cont.) Strategic Workforce Planning Configuration Tasks

Configure	Description
Manage Strategic Skills and Categories	Optional To ensure that your workforce has the right skills to support the organization's goals, you create and manage strategic skills and categories. Strategic Workforce Planning provides three predefined categories: Behavioral, Technical, and Managerial skills. Under each Skill Category, you add individual Skills (such as Java Coding under the Technical category). You can add or rename categories of skills (for example, Language). Analyzing the workforce skills needed to meet your corporate goals prepares you for meeting those goals. The skill gaps inform your plans and provide information to make decisions about whether you need to retrain, hire, transfer, or retain people.
Demand Drivers	Mandatory Define demand drivers. Add or import demand drivers, which enable you to align the long-term demand for strategic jobs with your corporate goals. Some examples of demand drivers: revenue, units manufactured, and claims processed.
Global Assumptions	Mandatory Set foreign exchange rates in a multicurrency application. See Importing Strategic Workforce Planning Data for details on how to load data for a multicurrency application.
Valid Intersections for Jobs	Optional You can define validation rules so that forms and runtime prompts display only those jobs that are relevant for particular entities and scenarios. For example, you can define a rule so that only engineer jobs display in forms for the R&D department. You can select members, substitution variables, and attributes (such as Job Type) as members in a rule. To ensure correct supply calculations, you must select the No Job member and the OWP_Total Jobs member for Jobs. See Defining Valid Intersections in *Administering Planning*.
<Custom Dimension Name, such as Projects>	Optional Populate the application with a dimension you added, such as Projects, by importing members into the dimension.

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Strategic Workforce Planning Planning and Forecast Preparation

You can configure different time frames for the Plan and Forecast scenarios.

To configure the time frame for plans:

1. In **Current Fiscal Year**, select the current fiscal year.
2. From **Period**, select the current actual month. You need to update this value on a monthly basis.
3. From **Plan Start Year**, indicate if planners will plan in the current or next fiscal year.
4. Click **Plan**, and then the **Years** column to select the number of years to configure. For example, to configure the first five years of a ten year application, select 5 Years.
5. Selecting period granularity (i.e. Monthly, Quarterly, Yearly) has no impact on the Strategic Workforce module.
6. Click **Forecast** and repeat these steps to specify the forecasting basis.
   When you select **Quarterly** as the planning basis for **Forecast** for the first year, you can choose how Strategic Workforce Planning determines the current quarter, in cases where the current month is the last month of the quarter.

   When the current month is the last month of the quarter, select an option in **Planning and Forecast Preparation** for how Strategic Workforce Planning should define the current quarter:

   - If you select **Lock Current Period For Forecast**, Strategic Workforce Planning uses the next quarter. For example, if the current month is March, when you select this option, Strategic Workforce Planning defines the Current Quarter as Q2.
   - If you clear **Lock Current Period For Forecast**, Strategic Workforce Planning uses the current quarter. For example, if the current month is March, when you clear (deselect) this option, Strategic Workforce Planning defines the Current Quarter as Q1.

   Note:

   - **Lock Current Period For Forecast** is available only when Quarterly is selected as the planning basis for Forecast for the first year.
   - You can select the option for **Lock Current Period For Forecast** for each module.

This configuration task sets all required substitution variables.

In Workforce and Strategic Workforce, rules, templates, and forms allow different planning years for the Plan and Forecast scenarios in each module.

Workforce and Strategic Workforce business rules and templates use methods that read the start year and end year from the **Planning and Forecast Preparation** configuration task separately for the Plan and Forecast scenario for each module.

Forms display based on the start and end years for the Plan and Forecast using valid intersections. Valid intersections, **OWP_SWP_Scenario Years** and **OWP_SWP_Scenario Years_Reporting**, are created for Strategic Workforce to support the different year ranges for the Plan and Forecast scenarios.

Alternate hierarchies are created in the Account dimension to support differences in Workforce and Strategic Workforce. If both modules are enabled, the Account dimension is added to the appropriate valid intersections referencing these alternate hierarchies to distinguish between Workforce and Strategic Workforce accounts.

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To create custom rules or templates for Strategic Workforce, use these functions rather than the **&OEP_YearRange** substitution variable:

- `[[PlanningFunctions.getModuleStartYear("Strategic Workforce","ScenarioName")]]`
- `[[PlanningFunctions.getModuleEndYear("Strategic Workforce","ScenarioName")]]`

> **Note**
>
> Module name and Scenario name must be enclosed in double quotation marks.

> **Tip**
>
> If you want to create or edit rules to customize your planning and forecasting tasks, you can use Planning Formula Expressions in your rules to call the configured time horizon information such as `[[PlanningFunctions.getModuleStartPeriod("ModuleName","ScenarioName")]]` and `[[PlanningFunctions.isPlanStartYearSameAsCurrentFiscalYear("ModuleName")]]`.
> Module names are not case sensitive and must be enclosed in double quotation marks:
>
> - Workforce
> - Strategic Workforce
>
> See Scenarios in *Designing with Calculation Manager*.

Adding and Managing Accounts and Drivers

To add or modify accounts and drivers:

1. Select the configuration task to set up accounts or drivers.
2. Select a component or category from the list (if available).
3. Perform a task:
   - To add an artifact, select **Add** from the **Actions** menu, and then enter details in the new row.
   - To modify a group of artifacts, or to add many new ones, export the set of predefined artifacts (select **Export** from the **Actions** menu), and then modify the export file in Microsoft Excel. You can edit predefined artifacts, make a copy of an artifact and modify it to create a new one, or add new artifacts. Then, import the modified file (select **Import** from the **Actions** menu). If available, use categories and subcategories to group functionally related artifacts.
   - To export or import all drivers, regardless of their category or grouping, use **Batch Export** or **Batch Import**.
   - To export or import only certain kinds of drivers, specify a **Category** or a **Component**, and then use **Import** or **Export**.

Notes:

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- Specify unique member names and aliases for custom members so they don't conflict with any provided members.
- If you must delete a driver, check the formulas of the other account drivers in its group to see if they reference the driver that you want to remove. If they do, update their logic accordingly.

Setting Global Assumptions: Exchange Rates

If you created a multicurrency application, set up exchange rates. You can enter exchange rates manually as described here, or import them. For information about importing exchange rates, see Importing Exchange Rates for a Simplified Multicurrency Application in *Administering Planning*.

To set up exchange rates manually:

1. Add members for each of your currencies in the Currency dimension.
2. Click **Global Assumptions** to open the **Exchange Rates to <*Base Currency*>** task. Here you'll enter the exchange rates for the currencies that planners will use.
3. Select the members from the Point of View.
4. Enter average and ending exchange rates for each period and each currency, and then save the form.

The form is renamed to **Exchange Rates to <*Base Currency*>**, where **<*Base Currency*>** is the reporting currency you selected when you created the application. For example, if the application base currency is Yen, the form is **Exchange Rates to Yen**. This indicates to planners the currency against which exchange rates are used to convert their data, and enables them to enter rates specific to scenario, year, and version.

> **Note**
>
> If you add a new Version member, you must enter exchange rates in that version.

Strategic Workforce Planning Post Configuration Tasks

Perform these tasks after enabling and configuring Strategic Workforce Planning features.

Setting User Variables

After Strategic Workforce Planning features are enabled and configured, set the predefined user variables. Each user, including administrators, must select members for the provided user variables.

The members that you select for user variables set the initial POV (Point of View) when you open dashboards and forms. You can then can change the POV from within dashboards and forms, and their changes are then reflected in User Variables preferences.

To set user variables:

1. From the Home page, click **Tools** , and then **User Preferences** .
2. On the **User Variables** tab, select members for these user variables:

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- Currency
- Entity
- Job Type
- Reporting Currency
- Scenario—Set the scenario for Workforce
- Scenario View—Set the scenario for Strategic Workforce Planning
- Strategic Start Year and Strategic End Year—For Strategic Workforce Planning, limit skill set planning to a range of years by setting the start and end year
- Version
- Years

> **Note**
>
> For Workforce, set these additional user variables:
>
> - **Employee Parent**—Helps make forms more manageable by letting you include or exclude the employees to display on the forms based on the Employee Parent member you select, such as new hires or existing employees.
> - **Period**—Allows Comments for New Hires to be displayed as well as Total Compensation for all Employees/Jobs on the Mass Update forms.

> **Note**
>
> Administrators can set limits for user variables by selecting **Tools**, then **Variables**, then **User Variables**, and then selecting members for the **User Variable Definition**. Administrators can further limit data entry by assigning permissions, setting variables, and creating valid intersections.

Strategic Workforce Planning Rules

Strategic Workforce Planning provides business rules to calculate values in the application.

To see all the rules in the application, from the Home page, click **Rules**.

To run a rule from within a form, either click **Actions** and then the rule or right-click in a data cell. The available rules depend on the context.

About Strategic Workforce Planning rules:

- **Calculate Demand**—Run this rule after you enter demand driver information to see the impact on demand FTE.
- **Calculate Supply**—Run this rule after you enter supply driver information to see the impact on supply FTE.
- **Calculate Demand for All Data** and **Calculate Supply for All Data**—Run these rules after you enter demand or supply driver information to see the impact on demand FTE. This rule allows you to calculate for all data en-masse whenever you update supply and

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demand assumptions or when you load new data. You can calculate Demand or Supply for all data in your scope using the run time prompts for this rule.
The default Fix Parallel dimension is Entity, which is ideal if you're loading the bulk of your data into the Entity dimension. However, if you load the bulk of your data into another dimension, you can improve performance by modifying the FIXPARALLEL statement to apply to this dimension instead. Update the FIXPARALLEL statement in the Calculation Manager Template named OWP_FIXPARALLEL_T in the OEP_WFP cube. See Performance Considerations for Strategic Workforce Planning Rules.

When running these rules across a large set of employees and jobs, to avoid impact on user activity, Oracle recommends that you not run the rules while the system is under heavy usage, nor should you run multiple instances of this rule at the same time.

- **Process Loaded Strategic Workforce Data**—Run this rule after your import new data from HCM to compute headcount projections for Strategic Workforce Planning. Running this rule sets the Headcount to 1 and the Partial Payment Factor to 100% for every employee unless you've loaded different values at the processing month. This rule copies the data to the necessary periods in the planning year range.

  Best Practice Recommendations:

  – Don't run **Process Loaded Strategic Workforce Data** and the Workforce Module's **Process Loaded Data** rules at the same time.

  – You can run the rules **Process Loaded Strategic Workforce Data** and the Workforce Module's **Process Loaded data** for multiple entities at a time by selecting the parent entity under Total Entity. Oracle recommends that for performance reasons, you run multiple instances of rules by selecting different children under Total Entity instead of running rules for all entities in one pass.

- **Rollup WFP Cube**—Run this rule to see aggregated data.

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6

Configuring Workforce

Enabling Workforce Features

Before users can start workforce planning, enable the Workforce features you want to use.

Enable and configure Strategic Workforce Planning before enabling and configuring Workforce, and then enable any additional Workforce features you need.

Based on your selections, dimensions, drivers, forms, and accounts are populated. In most cases, you can come back later and incrementally enable additional features. However, note these exceptions:

- If you want to use **Employee Demographics**, you must select it the first time you enable features.
- You must enable all the dimensions you want to include in the application and rename dimensions the first time you enable using **Map/Rename Dimensions**.
- Your selections for **Granularity** and **Employee Demographics** are set when you enable Strategic Workforce Planning and are also used if you enable Workforce.
- Make sure you add any required custom dimensions or rename dimensions while enabling Strategic Workforce Planning. These dimensions are also used for Workforce. If you've already enabled Strategic Workforce Planning, you can't add custom dimensions or rename dimensions when you enable Workforce.

> **Tip**
>
> If your company doesn't use Union Code, you can rename the Union Code dimension to a dimension that's more meaningful for your business. You must do so when you first enable features.

After you enable a feature, you can't later disable it.

Table 6-1 Video

Your Goal	Watch This Video
Learn about enabling and configuring Workforce.	Configuring Workforce Planning in Oracle Enterprise Planning Cloud

1. From the Home page, click **Application**, and then click **Configure**.
2. From the **Configure** list, select **Workforce**, and then click **Enable Features**.
   Select the features you want to enable. Except as noted, you can come back later and enable additional features, so enable only the features you need to use now.

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Table 6-2 Workforce Enable Features

Feature	Description
Granularity	Select the level of workforce detail to manage: • **Job**—Manage job workforce expenses at the job-only level. • **Employee and Job**—Manage workforce expenses by both employees and jobs. You must select a level of granularity. If you already enabled Strategic Workforce Planning, Granularity for Workforce is already set based on what you enabled in Strategic Workforce Planning. To learn more, see Identifying the Level of Workforce Detail to Capture.
Expense Planning	Select which workforce-related expenses to manage. To learn more, see Enabling Expense Planning.
Headcount Planning	Select the headcount-related details to manage. **Headcount Planning** option: Select **Headcount Planning** and **Employee Demographics** to analyze such employee attributes as veteran status, gender, and age band. If you want to use **Employee Demographics**, you must select it the first time you enable features. Available only for **Employee and Job** granularity. If you already enabled Strategic Workforce Planning, your selection for **Employee Demographics** in Workforce is already set based on what you enabled in Strategic Workforce Planning.
Workforce Management	Select to plan expenses based on employee or job hiring, terminating, or transferring to another department, or to split an FTE across multiple dimensions. To learn more, see Enabling Workforce Management.

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Table 6-2 (Cont.) Workforce Enable Features

Feature	Description
Map/Rename Dimensions	• Enable up to three additional custom dimensions in your application. • Map custom dimensions to existing dimensions. • Rename base dimensions. You must perform this step the first time you enable Workforce. If you've already enabled Strategic Workforce Planning, you can't add custom dimensions or rename dimensions. For example, on the first pass, you select the top-level **Headcount Planning** checkbox without selecting options under it (such as **Employee Demographics**). Then you later enable **Employee Demographics**. You can't rename its associated dimensions Age Band, Gender, and Highest Degree of Education. For some dimensions, you have the option to choose whether or not they go into the reporting cube (OEP_REP). See Adding Custom Dimensions to the Reporting Cube.

Identifying the Level of Workforce Detail to Capture

You can enrich Workforce to reflect your organization's planning needs.

Your selection for **Granularity** in Strategic Workforce Planning is also used if you enable Workforce. You can rename **Job** or **Employee and Job** in **Map/Rename Dimensions**.

To help you decide the granularity you want:

Table 6-3 Overview of Granularity Level

Option	Description
Job	If you select **Job**, the Job dimension is added, which stores the roles assigned to employees. Examples of jobs: Engineer, Software Developer, and Mechanic. If you select this option, you must set defaults for Pay Type and Skill Set. Or, if you don't use this information, set them to null (the No *<member name>*). See Setting Defaults.

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Table 6-3 (Cont.) Overview of Granularity Level

Option	Description
Employee and Job	With this option, the Job dimension is used with the Employee dimension to facilitate analysis of roles across the organization, to track new hire requests, and to identify employees by role. If you select this option, you must assign defaults for Job and Union Code. See Setting Defaults. If you don't track Union Codes, you can use the No Union Code member or change Union Code to something that's meaningful to your business. **Note:** If you rename Union Code when enabling Workforce, you must still assign a default for the renamed dimension.

Enabling Expense Planning

Select **Expense Planning** and then select the workforce-related expenses to manage.

Compensation Expenses

If you select **Expense Planning**, then **Compensation Expenses**, which includes salary planning, is also selected by default. You can also enable **Additional Earnings**, **Benefits**, **Taxes**, and **Non Compensation Expenses** by the level of granularity you selected.

For **Additional Earnings**, **Benefits**, and **Taxes**, select an option to enable it, and then select the number of members to create. (By default, the minimum, one member, is selected for each enabled option.) You can have a maximum of 30 members across **Additional Earnings**, **Benefits**, and **Taxes**.

Configure **Additional Earnings**, **Benefits**, and **Taxes** based on the maximum number of components that an employee or job can receive. Set the number of **Additional Earnings**, **Benefits**, and **Taxes** based on your current needs, not your future needs, because you can change these values in the future.

For example, if Employee 1 receives 3 additional earnings, 3 benefits, and 2 taxes while Employee 2 receives 5 additional earnings, 2 benefits, and 4 taxes, then the configuration for the number of additional earnings, benefits, and taxes should be set to 5 additional earnings, 3 benefits, and 4 taxes.

About **Compensation Expenses**:

- Oracle recommends that you do not specify aliases for Additional Earnings, Benefits, and Taxes members. These members are placeholders used for assigning defaults to entities.
- If you reduce the number of **Additional Earnings**, **Benefits**, or **Taxes**, corresponding members are removed from the Account dimension. Before removing a component and its assigned expenses, back up by creating a snapshot. Additionally, review any customizations related to removed members on the forms, member formulas, or business rules (wherever the member is referenced) and make modifications as needed. Workforce won't remove members that are referenced in any customized artifacts such as forms, member formulas, and so on.
- After increasing the number of **Additional Earnings**, **Benefits**, or **Taxes**, which adds members, assign defaults to new members, and then run **Synchronize Defaults** to re-calculate compensation expenses.

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- After decreasing the number of **Additional Earnings**, **Benefits**, or **Taxes**, which removes members, run **Synchronize Definition** to re-calculate compensation expenses.
- If you decrease the number of **Additional Earnings**, **Benefits**, or **Taxes**, line items are removed from the lower end of the hierarchy. For example, if you had 10 members for **Additional Earnings**, and you decrease it to 5, then Earning6 to Earning10 are removed.

Additional Options

Merit Based Planning enables you specify merit rates for employees. You can select **Merit Based Planning** only if you enable granularity for either **Employee** or **Employee and Job**.

About **Merit Based Planning**:

- If you select only **Merit Based Planning** (and not **Merit Assumptions**), merit rates are set at the entity level. You must also enter a **Merit Month** and **Performance Rating** to use **Merit Based Planning**.
- Beginning with 18.04, Oracle provides a **Default Rate** so you no longer need to enter a **Performance Rating** depending on your business needs. You need to enter only a **Merit Month** for each employee.
- Merit for new hires is calculated based on the default merit rate.
- **Merit Based Planning** using user-entered performance ratings is available only for existing employees.
- Optionally, if you enable **Merit Assumptions**, you can specify at what level to plan: **Global** or **Per Entity**. Selecting **Merit Assumptions** also enables additional options for setting merit assumptions for **Merit Rate**, **Merit Month** and **Cut-off Date** for existing employees. See Setting Assumptions.
- If you select **Merit Assumptions**, the **Global** or **Per Entity** selection applies to all merit-based assumptions, including merit rate, merit month, and cut-off date. Ensure that you load merit rates to the level you select.
- You can incrementally enable **Merit Assumptions**.

> **Note**
>
> To plan merit for new hires, select **Merit Based Planning**; Oracle recommends that you also select **Merit Assumptions** and plan at the global or per entity level. Additionally, select **Workforce Management**, **New Hires** and **Merit Based Planning For New Hires**. For more information, see Enabling Workforce Management.

Enabling Workforce Management

Select **Workforce Management** and then select the options you want to plan expenses based on employee or job hiring, terminating, transferring to another department, or to split an FTE across multiple dimensions.

Workforce Management options:

- **New Hires**—Enables planning for new hires and their impact on expenses.
- **Merit Based Planning for New Hires**—Enables you to plan merit for new hires. You must also select **Merit Based Planning** in **Expense Planning Additional Options** to enable this option. Oracle recommends that you also select **Merit Assumptions** and plan at the global or per entity level.

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- **Terminations**—Enables planning for employee departures and their impact on expenses.
- **Transfers**—Enables you to transfer employees from one department (or entity) to another. Transferring employees changes the department against which their compensation expenses are calculated.
- **Split-Funded FTE**—Enables you to plan an FTE to be split-funded across multiple sparse dimensions such as cost center, entity, project, and so on.

Workforce Management options can be incrementally enabled.

About Merit Based Planning for New Hires

To plan merit for new hires, select **Merit Based Planning for New Hires**. You must also select **Merit Based Planning** in **Expense Planning Additional Options** to enable this option. Oracle recommends that you also select **Merit Assumptions** and plan at the **Global** or **Per Entity** level.

Granularity must be either **Employee** or **Employee and Job** to enable **Merit Based Planning**.

Merit Based Planning using user-entered performance ratings is available only for existing employees.

For information about merit based planning, see Enabling Expense Planning and Planning Merit Rates in *Working with Planning Modules*.

About Split-Funded FTE

The **Split-Funded FTE** option allows an FTE to be split-funded across multiple sparse dimensions such as cost center, entity, project, and so on.

When **Split-Funded FTE** is enabled, the Benefits and Taxes wizard is updated with a selection, **Flat Amount FTE Ratio**, for **Value Type** and **Maximum Value Type** for Benefits, Taxes, and Additional Earnings. Additionally, for Taxes, there is a selection available, **Threshold Amount FTE Ratio**, for **Maximum Value Type**. For each component in the Benefits and Taxes wizard, administrators can choose whether to use the **Flat Amount** calculation or the **Flat Amount FTE Ratio** calculation to calculate benefits, taxes, and additional earnings. For example, a fee for medical benefits might be the same amount whether the FTE is 1.0 or .5, so you would choose **Flat Amount FTE Ratio**. But a tax might be a based on a percentage of the FTE, so you would choose **Flat Amount**.

When you enable **Split-Funded FTE**, you **MUST** also enter the **Master FTE Value** for each employee on the **Employee Master Data** form. Missing existing employee master FTE will calculate incorrect ratio component expense. For more information, see Entering Employee Master Data.

Notes:

- You can incrementally enable **Split-Funded FTE**.
- **Granularity** must be either **Employee** or **Employee and Job** to enable **Split-Funded FTE**.
- **Value Type** and **Max Value Type** must match when using FTE Ratio. To ensure that either the FTE Ratio or FTE value is applied consistently, the Benefits and Taxes wizard does not allow a mismatch of methodologies for FTE Ratio.
- If the Tax tier changes based on a new Master FTE, then Tax Tiers aren't calculated with **Calc Compensation**. Run **Synchronize Defaults** or **Synchronize Definition** to calculate the Tax Tiers.
- If the Master FTE is changed, then run the **Synchronize Definition** rule.

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Adding Custom Dimensions to the Reporting Cube

Many Workforce and Strategic Workforce Planning dimensions are added to the Reporting cube (OEP_REP) by default. You can choose whether to add the custom dimensions to the reporting cube.

For new applications, you can perform this task only once, when you first enable features.

For new applications, you can also choose whether to disable Employee Demographics dimensions (Highest Education Degree, Skillset, Gender, and Age Band) from going to the reporting cube. (This option is not available for existing applications.)

For existing applications, you have a one-time option to perform this task the next time you make a change in **Enable Features** in either **Workforce** or **Strategic Workforce**. **Before you enable features**, you must clear data in the OEP_REP cube.

You can add custom dimensions using **Enable Features** for either **Workforce** or **Strategic Workforce**. Because the cubes are shared between the two modules, you can make the dimension updates in either module; the updates apply to both. Once you've made the change in one of the modules, you can't undo the change for the other module.

To choose whether a dimension should go in the reporting cube:

1. In **Enable Features** for either Workforce or Strategic Workforce Planning , in the **Map/ Rename Dimensions** section, click next to a dimension name.
2. In the **Valid For** section, click **Workforce Reporting Cube** and then click **OK**.
   The label in the **Selected Features** column is updated to **WorkforceReportingCube**.
3. For new applications, to disable Employee Demographics dimensions from going into the reporting cube, click next to an employee demographics dimension name, and in the **Valid For** section, clear the selection for **Workforce Reporting Cube** and then click **OK**.
   The label in the **Selected Features** column is updated to remove **WorkforceReportingCube**.

Additionally, when you push data to the reporting cube, merit data is also pushed and mapped to Merit Increase in the reporting cube.

About Configuring Workforce

For most configuration tasks, if you've already configured them in Strategic Workforce Planning you don't also have to configure them again in Workforce.

The planning and forecast range (configured in **Planning and Forecast Preparation**) can be different for Strategic Workforce Planning and Workforce. For example, you might want to use Strategic Workforce Planning for long-term planning and Workforce for short-term planning.

Configuring Workforce

Perform these configuration tasks after you've enabled Workforce features.

1. From the Home page, click **Application**, and then click **Configure**.
2. From the **Configure** list, select **Workforce**.

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3. Perform all mandatory tasks. Perform the optional tasks required for your business. Use the **Filter** to check the status of configuration actions. Use **Actions** to update task status.
4. After configuring, and any time you make changes in configuration or import metadata, refresh the database. From the **Configure** page, select **Refresh Database** from the **Actions** menu. Click **Create**, and then click **Refresh Database**.

Table 6-4 Configuration Options in Workforce

Configure	Description
Component	Optional Import selected Grades, Taxes, Benefits, and Additional Earnings, which are considered Workforce components. After importing a component, configure it with the appropriate **Configure** option. **Tip:** You can import metadata and data into components in a batch file. You can also use a template to import data. See Importing Data.
Entities	Mandatory Import the Entity dimension members that reflect your business hierarchy, such as departments, cost centers, and business units.
Salary Grades	Mandatory Define the salary basis (for example, Annual or Hourly) and the pay rates for the Salary Grades that you imported.
Options and Tiers	Optional Set options for Additional Earnings such as overtime or bonus and for Benefits such as medical benefit rates. Set tiers for Taxes, such as employer-paid taxes. After setting options and tiers, use the Benefits and Taxes Wizard to configure Additional Earnings, Benefits, and Taxes. See Adding and Managing Accounts and Drivers and Configuring Benefits, Taxes, and Additional Earnings.
Planning and Forecast Preparation	Mandatory Set the timeframe, the starting period, and the level of granularity for planning and forecasting. You can plan and forecast on a different basis for different years. See Workforce Planning and Forecast Preparation.
Benefits and Taxes	Mandatory Set up Benefits, Taxes, and Additional Earnings. A component is a tax, a benefit, or an additional earning. A wizard guides you through setting up a component with business-based questions. See Configuring Benefits, Taxes, and Additional Earnings.

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Table 6-4 (Cont.) Configuration Options in Workforce

Configure	Description
Workforce Assumptions	Mandatory Set default assumptions such as hours worked per day, week, and year. Also, set the partial payment factor, which sets the pay percentage to apply to Maternity status. You can set these assumptions by Scenario, Version, Entity, and Currency. For more information, see Setting Assumptions.
Employee Type	Optional Import more employee types in your organization as members into the Employee Type dimension. The provided employee type members are Regular, Contractor, and Temporary. This option is available for the Employee-only level of granularity.
Pay Type	Optional Import pay types in your organization as members into the Pay Type dimension. The provided pay types are Exempt and Non-Exempt. This option is available for the Employee-only level of granularity.
Employee Demographics	Optional Set up employee demographics such as Highest Education Level. Demographics enable you to analyze data based on individual employee characteristics. You can select, add, import, or export a demographic, such as ethnic group. If you enable Employee Demographics, Workforce provides the Gender, Age Band, and Highest Education Degree attributes, and you can add employee demographics such as veteran status. You typically import demographic attributes for existing employees, and planners assign demographics after new employees are hired. Workforce provides data maps for reporting on such information as demographics. See Adding and Managing Accounts and Drivers.
Employee Properties	Optional Set up employee properties such as Employee Type. Add, import, or export properties such as Skill Set, FT/PT, Start Month, Merit Month, and Hiring Status. Then to view and edit employee properties, use **Compensation Planning**, then the **Manage Employee Details** tab. See Adding and Managing Accounts and Drivers.

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Table 6-4 (Cont.) Configuration Options in Workforce

Configure	Description
Non Compensation Expenses	Optional Set up noncompensation expenses such as training or travel expenses. Add, import, or export a noncompensation expense. After noncompensation expenses are added, enter the data in the form (**Other Expenses**, and then **Non Compensation Expenses**). See Adding and Managing Accounts and Drivers.
Performance Metrics	Optional Add, import, export, or delete a performance metric for a component. For example, add performance ratings such as Meets Expectations and Exceeds Expectations. See Adding and Managing Accounts and Drivers.
Merit Rates	Mandatory Define merit rates by year. Select the scenario, version, and currency to which to apply the merit rates.
Employees	Optional Import employee names or employee numbers in your organization as members into the Employee dimension.
Jobs	Optional Import jobs in your organization as members into the Job dimension.
Skill Sets	Mandatory for Job Granularity Import skill sets used in your organization by importing members into the Skill Set dimension.
Union Codes	Mandatory for Employee and Job Granularity Import union codes used in your organization by importing members into the Union Code dimension. If you don't track Union Codes, you can rename the dimension to something that's meaningful to your business. However, you must still assign a default to the renamed dimension.
Gender	Optional Import members into the Gender dimension
Highest Education Degree	Optional Import highest education degrees used in your organization by importing members into the Highest Education Degree dimension.

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Table 6-4 (Cont.) Configuration Options in Workforce

Configure	Description
Age Band	Optional Import members into the Age Band dimension. Employees' ages are calculated and assigned to an age band as it changes over time. Oracle recommends that you use the default age bands instead of loading your own. If you are an existing customer, continue to use your existing age bands and members.
<Custom Dimension Name, such as Projects>	Optional Populate the application with a dimension you added, such as projects, by importing members into the dimension.
Global Assumptions	Mandatory Set foreign exchange rates in a multicurrency application.

For information on importing data, see Importing Data. You can also add members using the Dimension Editor.

After importing dimensions and members, you can view the hierarchical structure in the Dimension Editor.

Note the following:

- Don't change the member order of the provided members. Retaining the member order is important to support the provided calculations and logic.
- You can't add members to the Property dimension.

Workforce Planning and Forecast Preparation

You can configure different time frames and granularity for the Plan and Forecast scenarios.

To configure the time frame and granularity for plans:

1. In **Current Fiscal Year**, select the current fiscal year.

> **Note**
>
> Changing the current year affects all modules.

2. From **Period**, select the current actual month. You need to update this value on a monthly basis.
3. From **Plan Start Year**, indicate if planners will plan in the current or next fiscal year.
4. Click **Plan**, and then the **Years** column to select the number of years to configure. For example, to configure the first five years of a ten year application, select 5 Years.
5. Select the planning basis for each year that you are configuring. If plans will be prepared at the same frequency each year, click **All**, and then select the frequency (for example,

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Monthly). If plans will be prepared at different frequencies in certain years, select the frequency in each year's row. For example, to plan monthly in FY20 but quarterly in FY21, select **Monthly** in the row for FY20 and **Quarterly** in the row for FY21.

6. Click **Forecast** and repeat these steps to specify the forecasting basis.
When you select **Quarterly** as the planning basis for **Forecast** for the first year, the provided valid intersections are set up so that forecast data entry is allowed only in the appropriate periods; quarterly forecast periods prior to the current month can't be updated. The substitution variable OEP_CurQtr is provided whenever you enable Quarterly planning.

   When you select **Quarterly** as the planning basis for **Forecast** for the first year, you can choose how the current quarter is determined, in cases where the current month is the last month of the quarter.

   When the current month is the last month of the quarter, select an option in **Planning and Forecast Preparation** for how the current quarter should be defined.

   - If you select **Lock Current Period For Forecast**, Strategic Workforce Planning uses the next quarter. For example, if the current month is March, when you select this option, Strategic Workforce Planning defines the Current Quarter as Q2.
   - If you clear **Lock Current Period For Forecast**, Strategic Workforce Planning uses the current quarter. For example, if the current month is March, when you clear (deselect) this option, Strategic Workforce Planning defines the Current Quarter as Q1.

   Note:

   - **Lock Current Period For Forecast** is available only when Quarterly is selected as the planning basis for Forecast for the first year.
   - You can select the option for **Lock Current Period For Forecast** for each module.

This configuration task sets all required substitution variables.

> **Note**
>
> - In a Fiscal application (first month of the application is other than January), Workforce includes an additional prior year for the **Plan** scenario to compute benefits, earnings, and taxes that are to be paid based on the calendar year. This ensures that the appropriate thresholds are applied correctly starting from the prior year.
>
>   The same logic also applies to the **Forecast** scenario when the Start Month is the first month of the application.
> - Saving the **Planning and Forecast Preparation** configuration task restarts the application and requires you to refresh the database. If a background job is running, you must refresh the database later.

In Workforce and Strategic Workforce, rules, templates, and forms allow different planning years for the Plan and Forecast scenarios in each module.

Workforce and Strategic Workforce Planning business rules and templates use methods that read the start year and end year from the **Planning and Forecast Preparation** configuration task separately for the Plan and Forecast scenarios for each module.

Forms display based on the start and end periods for the Plan and Forecast using valid intersections. Valid intersections, **OWP_Scenario Years** and **OWP_Scenario**

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Years_Reporting, are created for Workforce to support the different year ranges for the Plan and Forecast scenarios.

Alternate hierarchies are created in the Account dimension to support differences in Workforce and Strategic Workforce. If both modules are enabled, the Account dimension is added to the appropriate valid intersections referencing these alternate hierarchies to distinguish between Workforce and Strategic Workforce accounts.

To create custom rules or templates for Workforce, use these functions rather than the **&OEP_YearRange** substitution variable:

- `[[PlanningFunctions.getModuleStartYear("Workforce","ScenarioName")]]`
- `[[PlanningFunctions.getModuleEndYear("Workforce","ScenarioName")]]`

> **Note**
>
> Module name and Scenario name must be enclosed in double quotation marks.

> **Tip**
>
> If you want to create or edit rules to customize your planning and forecasting tasks, you can use Planning Formula Expressions in your rules to call the configured time horizon information such as `[[PlanningFunctions.getModuleStartPeriod("ModuleName","ScenarioName")]]` and `[[PlanningFunctions.isPlanStartYearSameAsCurrentFiscalYear("ModuleName")]]`.
> Module names are not case sensitive and must be enclosed in double quotation marks:
>
> - Workforce
> - Strategic Workforce
>
> See Scenarios in *Designing with Calculation Manager*.

Using a Custom Dimension as the Forecast Scenario

If you have a custom scenario you want to use for the **Forecast** scenario, associate the **Hsp_Forecast** UDA with the scenario. Account member formulas calculate from the **Forecast** Start Year and Start Period in the first year if the UDA is associated with the scenario.

Adding and Managing Accounts and Drivers

To add or modify accounts and drivers:

1. Select the configuration task to set up accounts or drivers.
2. Select a component or category from the list (if available).
3. Perform a task:
   - To add an artifact, select **Add** from the **Actions** menu, and then enter details in the new row.

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- To modify a group of artifacts, or to add many new ones, export the set of predefined artifacts (select **Export** from the **Actions** menu), and then modify the export file in Microsoft Excel. You can edit predefined artifacts, make a copy of an artifact and modify it to create a new one, or add new artifacts. Then, import the modified file (select **Import** from the **Actions** menu). If available, use categories and subcategories to group functionally related artifacts.
- To export or import all drivers, regardless of their category or grouping, use **Batch Export** or **Batch Import**.
- To export or import only certain kinds of drivers, specify a **Category** or a **Component**, and then use **Import** or **Export**.

Notes:

- Specify unique member names and aliases for custom members so they don't conflict with any provided members.
- If you must delete a driver, check the formulas of the other account drivers in its group to see if they reference the driver that you want to remove. If they do, update their logic accordingly.

About Adding Employee Properties

You can add custom employee properties to the Account dimension using the **Configure** task for **Employee Properties** or using the Dimension Editor.

After adding a new custom property, add it as a shared member under the parent **OWP_Workforce Planning Accounts for Forms** so it shows up on forms. Refresh the database after making your changes.

To ensure that custom properties are transferred when you change an employee's job or transfer an employee, use a custom template, **OWP_Custom Template** to customize the rules and templates. For more information, see Customizing Workforce.

Setting Global Assumptions: Exchange Rates

If you created a multicurrency application, set up exchange rates. You can enter exchange rates manually as described here, or import them. For information about importing exchange rates, see Importing Exchange Rates for a Simplified Multicurrency Application in *Administering Planning*.

To set up exchange rates manually:

1. Add members for each of your currencies in the Currency dimension.
2. Click **Global Assumptions** to open the **Exchange Rates to <*Base Currency*>** task. Here you'll enter the exchange rates for the currencies that planners will use.
3. Select the members from the Point of View.
4. Enter average and ending exchange rates for each period and each currency, and then save the form.

The form is renamed to **Exchange Rates to <*Base Currency*>**, where **<*Base Currency*>** is the reporting currency you selected when you created the application. For example, if the application base currency is Yen, the form is **Exchange Rates to Yen**. This indicates to planners the currency against which exchange rates are used to convert their data, and enables them to enter rates specific to scenario, year, and version.

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> **Note**
>
> If you add a new Version member, you must enter exchange rates in that version.

Configuring Benefits, Taxes, and Additional Earnings

The following sections describe how to use the Benefits and Taxes Wizard to configure benefits, taxes, and additional earnings. You can have a maximum of 30 members in any combination across Additional Earnings, Benefits, and Taxes.

> **Tip**
>
> You can set up valid intersections for Options and Tiers to their respective parents in the Components dimension. For information on setting up valid intersections, see Defining Valid Intersections in *Administering Planning*.

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
This 90-minute tutorial shows you how to configure additional earnings, benefits, and taxes in Workforce.	Defining New Additional Earnings and Configuring Benefits & Taxes

Before You Use the Benefits and Taxes Wizard

Ensure that you have performed these tasks before you launch the wizard:

- Imported Benefits, Taxes, and Additional Earnings using **Components** on the Workforce **Configure** page. Importing the component makes it available in the wizard.
- Configured **Options and Tiers** on the **Configure** page to set up Benefits and Additional Earnings (Options) and Taxes (Tiers), which creates the options and tiers.

Then you're ready to launch the Benefits and Taxes Wizard to define each option for Benefits, Taxes, and Additional Earnings.

About the Benefits and Taxes Wizard

Using business-based questions, a wizard guides you through the steps to defining options for Benefits and Additional Earnings and defining tiers for (employer-paid) Taxes.

Examples:

- Additional Earnings: Overtime Pay, Merit Increase
- Benefits: Health Insurance, House Loan, Car Allowance
- Employer-paid Taxes: US FICA, Canada Pension Plan (CPP)

In the wizard, you specify the logic, such as whether a tax rate is a flat amount, a percentage of salary, incurred monthly, quarterly, or annually, and so on. You can also use the wizard to

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maintain taxes, benefits, and additional earnings. Each component can vary by scenario and version.

To launch the wizard, from **Configure**, click the **Benefits and Taxes** link. Use **Filter** to select the component to configure. You are guided through three steps: Details, Rates, and Review.

Note:

- Ensure that all entities have a rate and threshold (if the component uses a threshold). If the same rates and thresholds apply globally, run the rule **Copy Rates Across Entities** from a source entity. See Applying Rates by Hierarchy.
- Whenever you update an entity default for a benefit, tax, or additional earning, you must run the **Synchronize Defaults** rule to apply the entity default at the employee-job level. When you update an existing component (a benefit, tax, or additional benefit) in the wizard, you must run the **Synchronize Component Definition** rule to push the updated definition to employees and jobs.

Common Properties for the Components

Additional Earnings, Benefits, and Taxes share certain properties.

The components share these properties:

- Payment Terms, such as Monthly, Quarterly, or Annually.
- Payment Frequency, such as One-time Pay or Pay During Last Period. Payment Frequency is tied to Payment Terms.
- Component Types: Simple, Rate Table, Rate Table with Threshold, and Custom.

Component Types in the Wizard

On the **Details** screen, you select a component type (a calculation rate type) for a benefit, tax, or additional earning.

The component types:

- **Simple**—A single rate option per year with a threshold value. Then you assign the desired option to the appropriate drivers as defaults. Because the Simple component type is a single rate option or tier with a threshold value for all defaults, there's only one row: No Option for Additional Earnings and Benefits and No Tier for Taxes.
- **Rate Table**—Provides different rate options with no threshold values. With this component type, you assign the desired option or tier to the appropriate drivers as defaults. The rate table provides rows of options and tiers (you defined these rows of options and tiers with the **Options and Tiers** on the **Configure** page), with no threshold values that are assigned.
- **Rate Table and Threshold**—Provides different rate options with thresholds. With this component type, you assign the desired option or tier to the appropriate drivers as defaults. The rate table with threshold provides rows of options or tiers with thresholds as previously configured. Additional Earnings and Taxes support the Maximum Value Type of Threshold Amount, which crosses all tiers regardless of the option or tier assigned as a default.
- **Custom**—Enables you to create custom calculation logic for a component's additional earnings, benefits, or taxes. See Creating Custom Calculation Logic in a Component.

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> **Tip**
>
> A threshold is a cap or maximum value on the resulting expense value. For example, Car Allowance is a percent of salary up to a threshold of $4,000, when the Car Allowance benefit would stop. The rate changes when a cap is reached. For example, the tax rate in the first tier is 4.5% up to a threshold of $50,000, and the second tier is 12.6% up to $100,000. Not only does a threshold apply only to the tiered structure, but you can also set a maximum value with the Additional Earning, Benefit, or Tax calculations.

About One-time Pay Options

Using **One-time Pay Options** enables you to specify which month an additional earning, benefit, or tax is paid. Your options depend on which **Payment Terms** you've selected for the component.

For example, if a benefit needs to be paid once every six months in February and August, then select **Payment Terms** as **Semiannually (Calendar)**, **One-time Pay** as the **Payment Frequency**, and Second Month in the **One-time Pay Options**.

Another example: if your **Payment Terms** is **Annually (Fiscal Year)**, and you select **One-time Pay** as the **Payment Frequency**, then the one-time payment occurs once in the fiscal year. For **One-time Pay Options**, you can then select which month in the fiscal year (first through twelfth) the expense is calculated. If your fiscal year starts in July, and you select the eleventh month, the expense is added in May.

You access these options in the Benefits and Taxes Wizard on the **Details** page for the component.

About Value Type

Table 6-5 Value Type Options

Value Type	Description
Flat Amount	Available for: • Benefits • Additional Earnings • Taxes
Percentage of Salary	Available for: • Benefits • Additional Earnings • Taxes
Percentage of Overall Earnings	Available for: • Benefits • Taxes
Percentage of Taxable Earnings	Available for: Taxes
Flat Amount FTE Ratio	For use with split-funded FTE. Available for: • Benefits • Additional Earnings • Taxes

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About Maximum Value Type

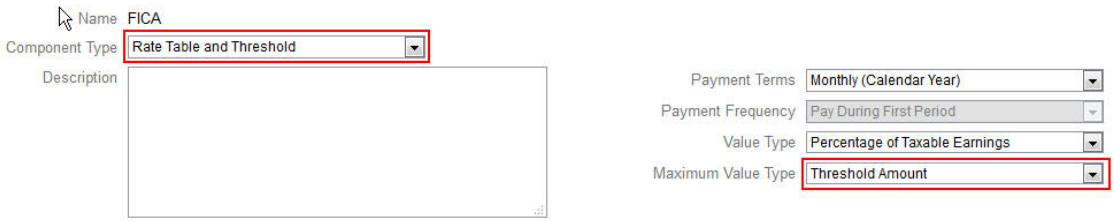
The available options for **Maximum Value Type** are based on whether the component is an Additional Earning, Benefit, or a Tax.

Value Type and **Max Value Type** must match when using FTE Ratio. To ensure that either the FTE Ratio or FTE value is applied consistently, the Benefits and Taxes wizard does not allow a mismatch of methodologies for FTE Ratio.

Setting the **Maximum Value Type** to **Threshold Amount** is available only for Taxes (not for Additional Earnings or Benefits). If the **Maximum Value Type** is set to **Threshold Amount**, then the threshold of each tier drives the tiered calculations. The application applies all tiers to the default assignment, as appropriate, regardless of the tier assigned as a default. If you need to apply a tiered tax with multiple tier rates, then select **Component Type** as **Rate Table and Threshold with Maximum Value Type** as **Threshold Amount**.

If you select the **Component** type as **Simple**, then you provide rates in No Tier. In this case, tiered calculation logic isn't applied even if **Maximum Value Type** is **Threshold Amount**.

You set the **Maximum Value Type** on the **Details** page of the wizard.



If the **Maximum Value Type** isn't set to **Threshold Amount**, then the assignment of each option or tier row is relevant and needs to be assigned appropriately.

For example, let's use US FICA tax as an example of setting the **Maximum Value Type** to **Threshold Amount**. No one row will be assigned as a default because all rows apply. So the tax rate is 7.65% of salary for the first $118,500, then 1.45% of salary over $118,500 up to $200,000. Then 2.35% tax is applied to salaries over $200,00. (You still have to select an option or tier when assigning the default; it is just ignored in the calculation.)

Example:

Entity	Scenario View	Version View	Currency	Component
No Entity	Plan	Working	USD	FICA

	FY16		FY17		FY18	
	Rate	Threshold	Rate	Threshold	Rate	Threshold
Tier1	7.65	118,500	7.65	119,000	7.65	120,000
Tier2	1.45	200,000	1.45	200,000	1.45	200,000
Tier3	2.35	99,999,999	2.35	99,999,999	2.35	99,999,999

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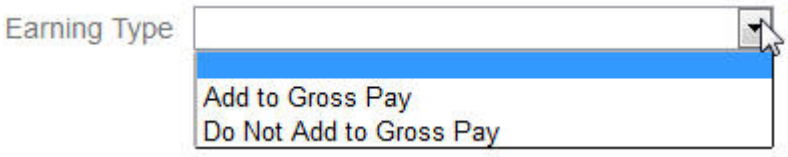
Table 6-6 Maximum Value Type Options

Value Type	Description
Flat Amount	Available for: • Benefits • Additional Earnings • Taxes
Percentage of Salary	Available for: • Benefits • Additional Earnings • Taxes
Percentage of Taxable Earnings	Available for: Taxes
Percentage of Overall Earnings	Available for: • Benefits • Taxes
Threshold Amount	Available for: Taxes
Flat Amount FTE Ratio	For use with split-funded FTE. Takes the FTE for the current intersection of data and divides it by the Master FTE, and multiplies by the Flat Amount. Available for: • Benefits • Additional Earnings • Taxes
Threshold Amount FTE Ratio	For use with split-funded FTE. Takes the FTE for the current intersection of data and divides it by the Master FTE, and multiplies by the Threshold Amount. Available for: Taxes

About Earning Type

Earning Type is valid only for Additional Earnings.



The earning types **Add to Gross Pay** and **Do Not Add to Gross Pay** drive the Benefits and Taxes **Value Type** and **Maximum Value Type** of Overall Earnings. So if the **Earning Type** is set to **Add to Gross Pay**, then those Additional Earnings will be included in any Benefit or Tax based on % Overall Earnings.

If the **Earning Type** is set to **Do Not Add to Gross Pay**, then any Benefit or Tax using % Overall Earnings for the **Value Type** and **Maximum Value Type** will exclude those Additional Earnings from any Benefit or Tax calculations based on % Overall Earnings.

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About Taxable Component

Taxable Component works like **Earning Type** in that any Additional Earning or Benefit set to Yes for **Taxable Component** will be included in any Tax calculation where the **Value Type** or **Maximum Value Type** is set to % Taxable Earnings.

About Entering Rates

You can enter component rates and logic by period and by entity in the Benefits and Taxes Wizard. You can account for rates that change during the year and assess their impact on compensation expenses. For example, you can account for a tax rate that changes in July.

The **Rates** page in the Benefits and Taxes Wizard opens with the YearTotal member collapsed with the Time Balance property of Account set to Balance. You can enter a value in YearTotal, and the value automatically spreads to the last of its child time periods. If no distribution exists (that is, the values for all children are zeros or are missing), the value is spread across its children. Or, you can expand YearTotal and manually enter or change rates in the level 0 members.

About Rates and Threshold Scope

The **Threshold Scope** option (**YTD** or **Monthly**) for a component enables you to set rate tiers for an additional earning, benefit, or tax that are calculated independently each month or year.

For example, an insurance program may apply rate tiers that start from zero each month.

In this example, assume employees in Finance earn $4,000, where tax is defined as **Percent of Salary**, with a **Threshold Scope** of **Monthly** and three rate tiers:

Scenario	Version	Currency	Entity
Plan	Working	USD	Finance US

	FY18		
	Rate	Threshold	
	YearTotal	YearTotal	Y
Tier1	12	1000	
Tier2	20	3000	
Tier3	30	5000	

Their tax rate is 12% for the first 1,000 monthly compensation, 20% between 1,000 and 3,000 earned, and 30% between 3,000 and 5,000.

Applying Rates by Hierarchy

You can apply the same rates and thresholds to members within a section of the Entity hierarchy by using the **Copy Rates Across Entities** rule. Using this rule saves you from having to manually enter or import rate data.

The **Copy Rates Across Entities** rule is especially useful when a number of entities use the same rates and thresholds for additional earnings, benefits, or taxes. On the **Rates** page, you can copy component rates and thresholds from one entity to another section of the hierarchy by running this rule from the **Actions** menu. In the **Member Selector**, select the source level 0 Entity member whose rate you want to copy and the target parent or level 0 member to copy the rate to.

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For example, you can enter rate data for a benefit for France and then use **Copy Rates Across Entities** to copy the benefit rate using relationship functions to all level 0 descendants of Total Europe and level 0 descendants of Total Nordic.

Creating Custom Calculation Logic in a Component

Defining your own Workforce calculations in a custom component gives you great flexibility in applying conditional logic and specifying value drivers to calculations for additional earnings, benefits, or taxes.

For example, you could create a bonus calculation that applies to new hires who start in the first 6 months of a calendar year, but not for those who start in the last 6 months of the calendar year in their first year of hire. You can also select a value driver other than the predefined ones (for example, Flat Amount, Percentage of Salary, and so on). So, for example, you could base an additional earning such as commissions on a custom member that you create, for example, Revenue. To specify a member as the Value Type driver, you include it in the member formula for the custom component.

To customize logic in a custom component:

1. In the Benefits and Taxes Wizard, on the **Details** page, edit an existing component, and for **Component Type**, select **Custom**.
2. Continue setting up the component, optionally entering rates to be used in your custom logic.
   Include any thresholds in the member formula.
3. Create a member formula for the **OWP_Custom Expense** member in the Property dimension:
   a. On the Home page, select **Application**, then **Overview**, and then **Dimensions**.
   b. Click the down arrow to the right of **Cube**, and then select **OEP_WFP**.
   c. Click **Property**, right-click in the **Member Name** column header, and then clear **Default mode**.
   d. Select the member **OWP_Custom Expense**, scroll right to the **OEP_WFP Formula** column, and then click in the intersection cell.
   e. In the upper left of the grid, click the Member Formula icon

   .
   f. Enter the member formula.

Notes:

- Before creating your own custom calculation logic, Oracle encourages you to first do due diligence in using the predefined calculations.
- Evaluate the performance of your custom formula before taking the application into production.
- To create and use multiple custom components, modify the **OWP_Custom Expense** member formula to accommodate each component's custom logic. For example, use nested IF conditions for each custom component type.

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> **Tip**
>
> See the next topics for advice on customizing calculation logic and for several sample formulas.

Creating Custom Formulas for **OWP_Custom Expense**

Use these tips and the formula examples that follow to help you create custom formulas for **OWP_Custom Expense**. These tips assume that the application granularity is Employee and Job.

- Data for properties such as Payment Terms, Payment Frequency, and Value Type are stored at the corresponding Property member > No Currency > Begbalance > Account (Benefit1:10/Earning1:10/Tax1:Tax10) at the Employee and Job combination.
- Rates are stored at OWP_Value > Currency > Account (Benefit1:10/Earning1:10/Tax1:Tax10) at the Employee and Job combination.
- Thresholds are stored at OWP_Maximum Value > Currency > Account (Benefit1:10/Earning1:10/Tax1:Tax10) at the Employee and Job combination.
- You can refer to the provided formulas for evaluating the periods to calculate the expenses based on Cal Tp-Index of the month, corresponding to different Payment Terms options.
- To add multiple custom formulas, nest them in the OWP_Custom Expense member formula.

Customizing Benefit and Tax Calculations

Review these examples to help you customize your benefit and tax calculations.

Use Case 1

You want to calculate commission as a percentage of the Commission Basis account, which is a custom account not provided with Workforce. Commission is calculated by multiplying the rate entered in the Benefits and Taxes Wizard times the custom Commission Basis account.

Sample Formula

```
IF("No Property"->"BegBalance"==[OWP_EarningList.Commission])
    IF(@ISMBR(@RELATIVE("OWP_Existing Employees",0)))
        "Commission Basis"->"No Property" * ("OWP_Value"/100);
    ELSE
        #Missing;
    ENDIF
ENDIF
```

Use Case 2

Building on the previous example, you want to add a benefit called Insurance, which is calculated as a percentage of the Merit account, with the following values selected in the Benefits and Taxes Wizard:

- **Component Type**—Custom
- **Payment Terms**—Quarterly (Calendar Year)
- **Payment Frequency**—Pay During First Period

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- **Maximum Value Type**—Flat Amount
- **Threshold Scope**—YTD
- **Taxable Component**—Yes
- **Rate for all months**—10
- **Threshold**—400
- **Value Type**—You can select any value for Value Type as we are calculating the benefit as a percentage of Merit in the custom logic.

Sample Formula

```
IF("No Property"->"BegBalance"==[OWP_EarningList.Commission])
    IF(@ISMBR(@RELATIVE("OWP_Existing Employees",0)))
        "Commission Basis"->"No Property" * ("OWP_Value"/100);
    ELSE
        #Missing;
    ENDIF
ELSEIF("No Property"->"BegBalance"==[OWP_BenefitList.Insurance])
    IF("Cal TP-Index"==1 OR "Cal TP-Index"==4 OR "Cal TP-Index"==7 OR "Cal TP-
Index"==10)
        "OWP_Expense amount"="OWP_Merit"->"OWP_Expense amount"*("OWP_Value"/
100);
    ENDIF;
    IF("OWP_Expense amount"!=#MISSING)
        IF("OWP_Calculated Max Value"!=#MISSING)
            IF("OWP_CYTD(Prior)"+"OWP_Expense amount">"OWP_Calculated Max
Value")
                IF("OWP_CYTD(Prior)"<="OWP_Calculated Max Value")
                    "OWP_Expense amount"="OWP_Calculated Max
Value"-"OWP_CYTD(Prior)";
                ELSE
                    "OWP_Expense amount"=#MISSING;
                ENDIF;
            ENDIF;
        ENDIF;
    ENDIF;
    "Custom Expense"="OWP_Expense amount";
ENDIF;
```

Use Case 3

Building on the previous examples, you want to add a Tax (Tiered Tax) named SUTA, which is calculated as a percentage of Benefit1, Benefit2, Benefit3, and Benefit4, with the following values selected in the Benefits and Taxes Wizard:

- **Component Type**—Custom
- **Payment Terms**—Monthly
- **Maximum Value Type**—Threshold
- **Threshold Scope**—Monthly
- No rates are provided in the Rates page.
- For the custom tiered tax, rates need to be provided as part of the custom formula.

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Sample Formula

```
IF("No Property"->"BegBalance"==[OWP_EarningList.Commission])
    IF(@ISMBR(@RELATIVE("OWP_Existing Employees",0)))
        "Commission Basis"->"No Property" * ("OWP_Value"/100);
    ELSE
        #Missing;
    ENDIF
ELSEIF("No Property"->"BegBalance"==[OWP_BenefitList.Insurance])
    IF("Cal TP-Index"==1 OR "Cal TP-Index"==4 OR "Cal TP-Index"==7 OR "Cal TP-
Index"==10)
        "OWP_Expense amount"="OWP_Merit"->"OWP_Expense amount"*("OWP_Value"/
100);
    ENDIF;
    IF("OWP_Expense amount"!=#MISSING)
        IF("OWP_Calculated Max Value"!=#MISSING)
            IF("OWP_CYTD(Prior)"+"OWP_Expense amount">"OWP_Calculated Max
Value")
                IF("OWP_CYTD(Prior)"<="OWP_Calculated Max Value")
                    "OWP_Expense amount"="OWP_Calculated Max
Value"-"OWP_CYTD(Prior)";
                ELSE
                    "OWP_Expense amount"=#MISSING;
                ENDIF;
            ENDIF;
        ENDIF
    ENDIF
    "Custom Expense"="OWP_Expense amount";
ELSEIF("No Property"->"BegBalance"==[OWP_TaxList.SUTA])
    IF("OWP_Benefit1"->"OWP_Expense amount"+"OWP_Benefit2"->"OWP_Expense
amount"+"OWP_Benefit3"->"OWP_Expense amount"+"OWP_Benefit4"->"OWP_Expense
amount"<=1000)
        ("OWP_Benefit1"->"OWP_Expense amount"+"OWP_Benefit2"->"OWP_Expense
amount"+"OWP_Benefit3"->"OWP_Expense amount"+"OWP_Benefit4"->"OWP_Expense
amount")*(10/100);
    ELSEIF("OWP_Benefit1"->"OWP_Expense amount"+"OWP_Benefit2"->"OWP_Expense
amount"+"OWP_Benefit3"->"OWP_Expense amount"+"OWP_Benefit4"->"OWP_Expense
amount"<=1200)
        (("OWP_Benefit1"->"OWP_Expense amount"+"OWP_Benefit2"->"OWP_Expense
amount"+"OWP_Benefit3"->"OWP_Expense amount"+"OWP_Benefit4"->"OWP_Expense
amount")-1000)*(20/100) + 1000*(10/100);
    ELSEIF("OWP_Benefit1"->"OWP_Expense amount"+"OWP_Benefit2"->"OWP_Expense
amount"+"OWP_Benefit3"->"OWP_Expense amount"+"OWP_Benefit4"->"OWP_Expense
amount"<=1300)
        (("OWP_Benefit1"->"OWP_Expense amount"+"OWP_Benefit2"->"OWP_Expense
amount"+"OWP_Benefit3"->"OWP_Expense amount"+"OWP_Benefit4"->"OWP_Expense
amount")-1200)*(30/100) + (1200-1000)*(20/100) + 1000*(10/100);
    ELSE
        (1300-1200)*(30/100) + (1200-1000)*(20/100) + 1000*(10/100);
    ENDIF
ENDIF
```


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> **Note**
>
> Do not assign values to the **OWP_Expense Amount** member. If there is a use case to apply further logic on a computed value, then assign the **OWP_Expense Amount** to **OWP_Custom Expense**. Refer to similar Use Case 2 above.

After Configuring Using the Wizard

After configuring Additional Earnings, Benefits, and Taxes using the wizard, perform these tasks:

- Assign defaults for Salary, Additional Earnings, Benefits, and Taxes. See Setting Defaults.
- Assign defaults for Salary Grades for New Hires.
- To assign the defaults to employees (in Employee only or Employee and Job granularity) and jobs (in Job only granularity), run the **Synchronize Defaults** rule. This rule is applied to both new hires and existing employees or jobs.

  To run the rule for a single employee or job or an employee-job combination, in the form, select that row and then click **Actions**, and then **Synchronize Defaults**. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**. To run the rule for a parent level employee/job, click **Actions**, then **Business Rules**, and then **Synchronize Defaults**.

Example - Adding a Fringe Benefit

This example walks you through the steps to creating a new fringe benefit. Let’s say that you want the benefit to be a percentage of employees' salary. You want to specify a different percentage for employees in North America, EMEA, and APAC, ranging from 33% to 35%.

Before you start, we assume that:

- You've enabled Workforce for, at a minimum, **Expense Planning**, **Compensation Expenses**, and **Benefits**. (All three granularity levels support benefits.)
- You've imported the application metadata to include the Fringe Benefit Rate component member.
- You’ve set the user variables.

Add the Fringe Benefit as a Component

First, we'll use the Benefits and Taxes Wizard to create a new benefit.

1. From the Home page, click **Application**, and then **Configure**.
2. From the **Configure** list, click ▼, and then **Workforce**.
3. From **Configure: Workforce**, click **Options and Tiers**.

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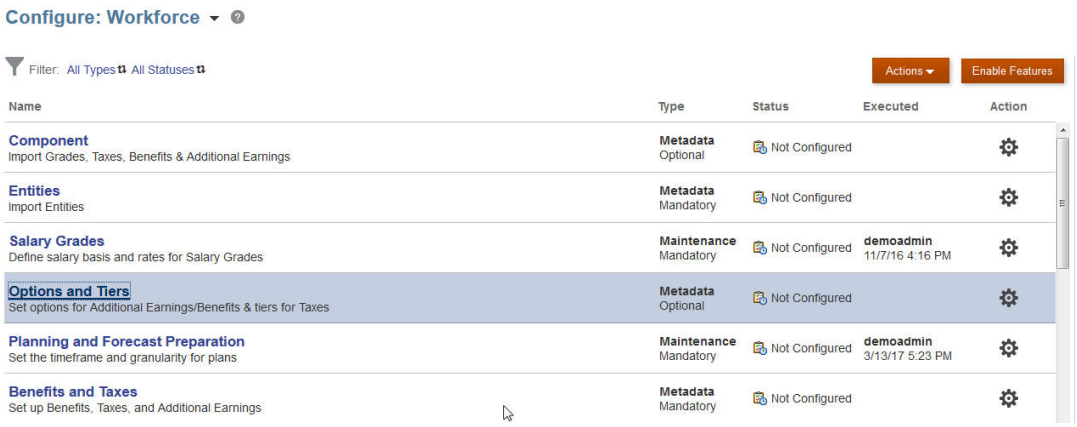


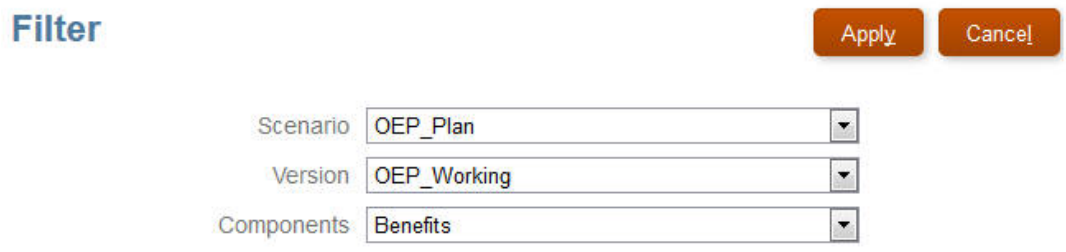
4. On **Options and Tiers**, from **Component**, select **Options**.
5. From **Actions**, select **Add**, then in the text box, enter *Fringe Rate – North America*. Repeat to add an option for EMEA and APAC:

6. Click **Save**, then **Next**, and then **Close**.

Define the Fringe Benefit

Next, we use the Benefits and Taxes Wizard to set the rate for the fringe benefit options.

1. From **Configure: Workforce**, click **Benefits and Taxes**.
2. Click Filter .
3. Select the Scenario and Version for the fringe benefit and from **Components**, click **Benefits**, and then **Apply**:



4. Under **Details**, set the fringe benefit parameters:

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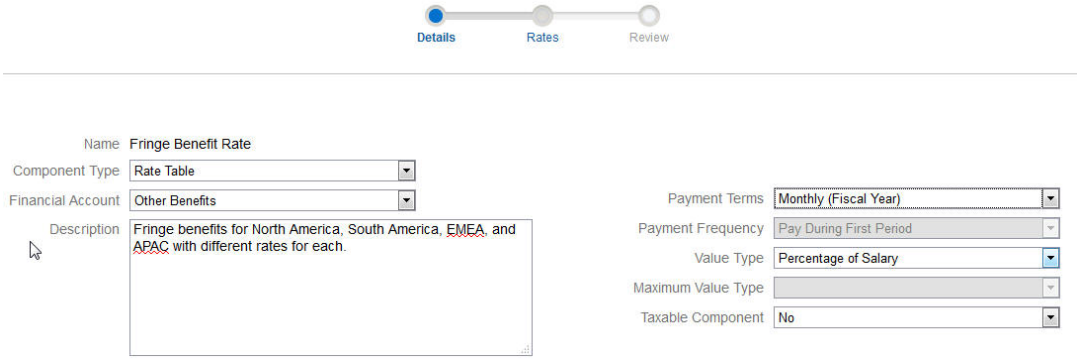
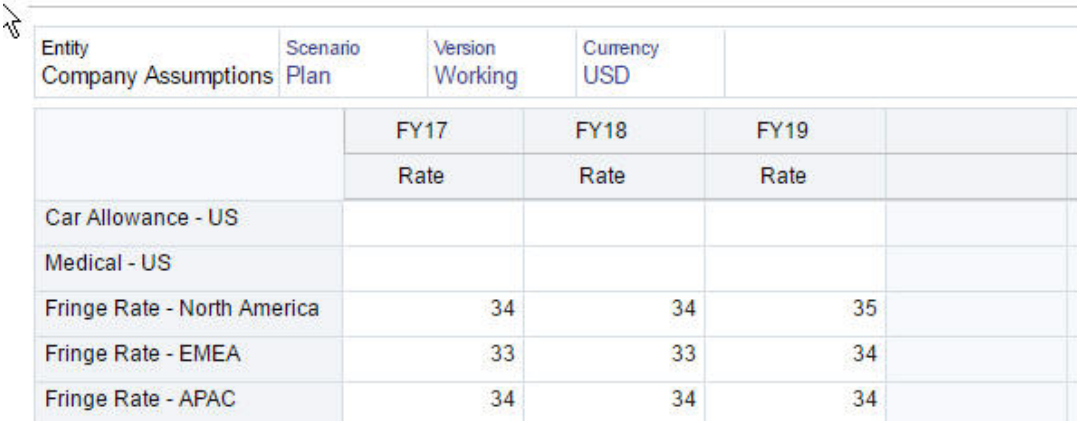


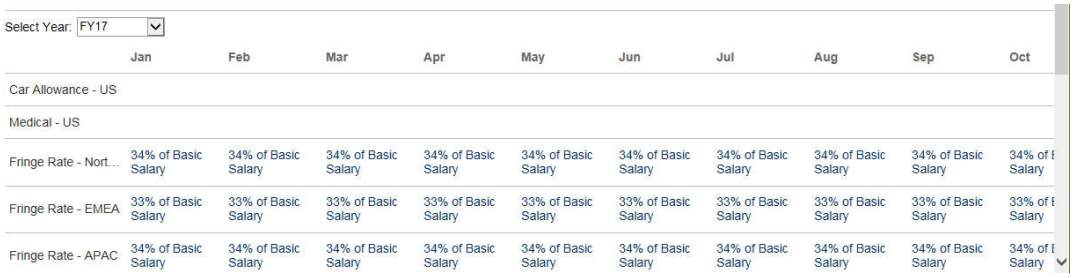
5. Click **Save** and **Next**.
6. On **Rates**, enter the fringe benefit rates for each fringe rate option for each year:



Entity: Company Assumptions | Scenario: Plan | Version: Working | Currency: USD

	FY17	FY18	FY19
	Rate	Rate	Rate
Car Allowance - US			
Medical - US			
Fringe Rate - North America	34	34	35
Fringe Rate - EMEA	33	33	34
Fringe Rate - APAC	34	34	34

7. Click **Save** and **Next**.
8. Review the new benefits options:



Select Year: FY17

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Car Allowance - US										
Medical - US										
Fringe Rate - Nort...	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary
Fringe Rate - EMEA	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary	33% of Basic Salary
Fringe Rate - APAC	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary	34% of Basic Salary

9. Click **Save**, and then **Close**.

Set the Benefit Defaults

Next we'll set the benefit defaults for the children members of each parent entity: North America, EMEA, and APAC.

1. Click **Workforce** on the Home page.
2. Click **Compensation Planning**, then **Defaults**, and then **Benefits**.
3. From the POV, select the Entity member.

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In this example, we'll set the benefit default for *Sales Italy*.

4. Click **Actions**, and then **Add Benefit Default**.
5. On **Add Benefit Defaults**, for **Benefit**, select **Fringe Benefit Rate**, and for **Option**, select **Fringe Rate – EMEA**:

6. Click **Launch**.

Now, whenever you add a hiring requisition (using the Add TBH business rule) to Sales Italy, the new fringe benefit rate that we set up for EMEA (for example, 34% for 2017) is applied. Compensation is automatically calculated, including the fringe benefit. (The fringe benefit rate is also applied when you run the **Synchronize Default** business rule.) If you update the fringe benefit rate using the Benefits and Taxes Wizard, to apply the updated rate, run the **Synchronize Component Definition** business rule.

Post Configuration Tasks

Related Topics

- Setting Assumptions
  Assumptions (and defaults) drive the calculations for workforce-related expenses.
- Setting Defaults
  Defaults (and assumptions) drive the calculations for workforce-related expenses.
- Entering Employee Master Data
- Synchronizing Defaults
- Customizing Workforce
  Learn how to customize Workforce.
- Post Update Tasks
  After updating Workforce content from a monthly update, note the following information.

Setting Assumptions

Assumptions (and defaults) drive the calculations for workforce-related expenses.

To set assumptions, click **Compensation Planning**, then the **Assumptions** tab . Then, click the tab for **General**, **Salary Grades**, or **Merit Rates**. Administrators set these workforce assumptions as part of configuration. If they're granted permissions, planners can then update them as needed.

Assumptions include:

- **General** assumptions including hours worked per day and week, and working days per month, which drive salary expenses for hourly employees, and the partial payment factor (that is, the pay percentage to apply to Maternity Status).

  For assumptions other than merit, you can set assumptions by entity or at the No Entity level (for default assumptions). If you set assumptions for the entity, then they are used for

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calculations; otherwise, the assumptions set for No Entity (at the organization level) are used.

If you enabled **Merit Assumptions**, you can also set merit assumptions for **Merit Month** and **Cut-off Date** for existing employees.

- **Merit Month** specifies, for each year, the month in which to give a merit increase.
- For existing employees, the **Cut-off Date** indicates the date, for each year, by which an employee must be hired to be eligible for a merit increase.

Merit assumptions are set at either a global level or entity level depending on how merit assumptions were enabled. For information whether the global or entity level will be used for setting merit assumptions, see Enabling Expense Planning.

> **Note**
>
> For existing employees, you must run **Process Loaded Data** to see the impact of **Merit Month** and **Cut-off Date**.
> Whenever you update **Merit Month** or **Cut-off Date**, you must run **Process Loaded Data** to synchronize at the employee level.

- **Salary Grades** assumptions, including the salary basis (for example, annual) and rate for Salary Grades.

  You can set assumptions by entity or at the No Entity level (for default assumptions). If you set assumptions for the entity, then they are used for calculations; otherwise, the assumptions set for No Entity (at the organization level) are used.

- **Merit Rates**, which are added to salary calculations.

  Merit rates are set at a global level or entity level depending on how merit assumptions were enabled. For information whether the global or entity level will be used for setting merit assumptions, see Enabling Expense Planning.

After setting assumptions, run the **Synchronize Defaults** rule (see Synchronizing Defaults.) To set defaults for Salary, Additional Earnings, Benefits, and Taxes, see Setting Defaults.

Setting Defaults

Defaults (and assumptions) drive the calculations for workforce-related expenses.

If you want a default for salary, additional earnings, benefits, or taxes to be used for all employees in a specific job, select that job when adding the default. For example, if you select Accountant when adding the default for Job, then all employees who are Accountants are assigned that default.

If Employee and Job granularity is enabled, you must set defaults based on Job and Union Code. This setting defaults compensation elements for new hires for a specific job. For example, you might set the default Salary Grade to Grade 3 for a Warehouse Worker with the Union Code of Teamster.

To apply a compensation element default to all employees in all jobs, such as when setting defaults for salary, additional earnings, benefits, and taxes, select the OWP_All <*member*>. For example, select the OWP_All Union Code member and the OWP_All Jobs member if you want the default compensation element to be used for all employees in any job and in any union. So for example, if you select the OWP_All Union Code member and the OWP_All Job member, then Sue Doe in Accounting (whose Union Code is Default No Union Code) would get the

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same compensation element default as Tom Blue in the Warehouse (whose Union Code is Teamsters).

> **Note**
>
> Workforce seeds a level 0 member named No Union Code as a sibling to Total Union Code. However, when you add defaults for salary, additional earnings, benefits, and taxes, No Union Code isn't available for selecting in the runtime prompt. To meet this need, Workforce expects you to add at least one sibling null metadata member (such as OWP_Unspecified Union Code) to OWP_All Union Code.
>
> If your company doesn't use Union Code, you can rename that dimension to something that's meaningful to your business when you enable Workforce. If you didn't rename Union Code when you enabled Workforce, you can create whatever members you want in the Union Code dimension and change the alias of the dimension to your preferred name.

Set Workforce defaults by clicking or tapping **Compensation Planning**, then the **Defaults** tab. Then:

- To set Salary defaults, click **Salary**. These defaults are used for new hires or job salary defaults. Using **Assumptions**, and then **Salary Grades** , planners can then set the salary basis (for example, Annual or Hourly) and the salary rate for the Salary Grades that you imported.

  If you import the salary basis and salary rates to the OEP_No Entity member, they are used across all entities. Alternately, select OEP_No Entity (in **Compensation Planning**, then **Assumptions**, and then **Salary Grades**).
- To set Additional Earnings defaults, click **Additional Earnings**.
- To set Benefits defaults, click **Benefits**.
- To set Taxes defaults, click **Taxes**.

> **Note**
>
> When adding defaults, you can select parent driver dimension members or level zero members.

> **Tip**
>
> To copy defaults for **Salary**, **Additional Earnings**, **Benefits**, and **Taxes**, right-click a member and then select **Copy Data Across Entities**, and then click **OK**. Select **From** and **To** entities, and then click **Launch**. This action clears the target before copying the members.
> Use **Copy Data Across Entities for Grades** to copy grades and rate information for grades.

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Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
This 45-minute tutorial shows you how to modify out-of-the-box templates in order to disable Salary Defaults. You first create a new Salary Option Smart List, and then modify Groovy Templates used in Workforce--Add Requisition, Change Requisition, and Change Existing Details--to use the salary options specified in the smart list: Salary Grade, and Salary Basis & Rate.	Disabling Salary Defaults

Entering Employee Master Data

When you enable **Split-Funded FTE**, you **MUST** also enter the **Master FTE Value** for each employee on the **Employee Master Data** form.

From the Home page, click **Workforce**, then **Compensation Planning**, then **Manage Employees**, and then **Employee Master Data**.

You enter the Master FTE for each fiscal year, at the periodicity defined for that year. Master FTE is required if you are using Split-Funded FTE.

> **Tip**
>
> The Employee Master Data form displays columns for all of the valid years. To make it easy to enter FTE for multiple time periods, enter data for YearTotal; the value is spread to the periods. You can expand the periods to change data for a specific month or quarter.

A new member in the Entity dimension, **OEP_Home Entity**, stores the Master FTE Value. **OEP_Home Entity** is enabled for the Workforce cube and the Workforce Reporting cube. If someone other than an administrator will be entering or editing Master FTE Values, make sure to give write access to **OEP_Home Entity**.

> **Tip**
>
> You can use data import templates to quickly load the Master FTE value for employees. See Importing Workforce Data.

Note: If an employee's total assigned FTE value changes over various projects (or other custom dimensions), make sure to update the Master FTE Value so that it matches the total assigned FTE to ensure that calculations are correct.

If the Master FTE is changed, then run the **Synchronize Definition** rule.

To help ensure that Master FTE matches the total assigned FTE, administrators can review the **FTE Assignment Analysis** form to see if an FTE is over- or under- allocated compared to the Master FTE. (From the Home page, click **Workforce**, then **Compensation Planning**, then **Validate**, and then **FTE Assignment Analysis**.) To retrieve data for this form, run the data

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map **Headcount and FTE Data for Reporting**. Positive values mean an FTE is underallocated; negative values mean an FTE is overallocated. You can resolve any over or under allocations by updating the Master FTE or the Assigned FTE.

Notes for new hires:

- FTE Ratio is applicable to new hires.
- You don't need to enter a Master FTE value in **OEP_Home Entity** for new hires. The Workforce calculations assume that the FTE for new hires is Master FTE.

Synchronizing Defaults

Whenever you update the entity defaults for benefits, taxes, or additional earnings using the **Benefit and Taxes** wizard on the **Configure** page, you must push the updated data to the input forms by running the **Synchronize Defaults** business rule.

1. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**.
2. Highlight a row with an individual or a blank row.

   If you intend to execute the business rule for:

   - Only one person, highlight the row containing that person's name, and then run the rule
   - Multiple people or to select the dimensionality with a runtime prompt, highlight a blank row and then run the rule
3. Click **Actions**, then **Business Rules**, and then **Synchronize Defaults**.

The business rule recalculates and updates data in the forms.

> **Note**
>
> When you update the metadata for a component (for example, salary grades, benefits, taxes, and additional earnings), run the **Synchronize Component Definition** business rule to push the updated definition to already-assigned employees and jobs. This rule doesn't update the entity defaults.

Customizing Workforce

Learn how to customize Workforce.

Customizing Workforce Tax Calculation Tiers

You can customize the Workforce Tax calculation tiers in the out-of-box scripts to add additional tiers.

There is a custom script in the Tax calculation in the following scripts, so you can add your own logic for tax calculations and add additional tiers:

- OWP_Synchronize Defaults_T
- OWP_Synchronize Definition_T
- OWP_Assign Target Defaults

The following rules are affected by this change:

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- OWP_Synchronize Defaults
- OWP_Synchronize Definition
- OWP_Process Loaded Data
- OWP_Change job
- OWP_Transfer

This option gives you more flexibility if your organization's tax structure requires more than the three provided tax tiers.

Using a Custom Template to Support Workforce Customizations

Workforce provides a custom template, **OWP_Custom Template**, with three blank script blocks for each supported rule, which allows you to customize the supported rules. For example, use the script blocks to include custom employee properties when you transfer an employee or change an employee's job.
OWP_Custom Template is not considered for updates, so you can write and maintain your custom, flexible code in one place. For example, the custom template ensures that any custom **Employee Properties** you may have added in the **Account** dimension are copied to the target job when you run the **Change Job** or two-step **Transfer** rules. Because you make your customizations in **OWP_Custom Template**, you don't need to edit the other provided rules or templates. This makes the other provided rules and templates easier to maintain during updates because you don't need to reapply any customizations you have made.

The following rules support **OWP_Custom Template** and will read any of the modifications you make to the custom script blocks:

- **OWP_Change Job**
- **OWP_Transfer**
- **OWP_Transfer In**
- **OWP_Transfer Out**

You don't need to make changes to any of the following templates to copy your custom properties. Use **OWP_Custom Template** instead.

- **OWP_Assign Target Defaults**
- **OWP_Change Job**
- **OWP_Transfer_T**
- **OWP_Transfer In_T**
- **OWP_Transfer Out_T**
- **OWP_Calculate Employee Compensation_Te**
- **OWP_Process Loaded Data_T**
- **OWP_Synchronize Defaults_T**
- **OWP_Synchronize Definition_T**

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> **Note**
>
> After adding a new custom property, make sure you added it as a shared member under the parent **OWP_Workforce Planning Accounts for Forms** so it shows up on forms. Refresh the database after making your changes. For more information, see About Adding Employee Properties.

To use the custom template, **OWP_Custom Template**:

1. From the Navigator, click **Rules** under **Create and Manage** to open Calculation Manager.
2. Open **OWP_Custom Template** to make your custom changes to the script blocks associated with the rule you want to customize.
   The descriptions in the script blocks give you more information about how to use the script blocks.
3. Click the custom script block for the rule you want to customize, enter your custom code, and save your changes.
   For example, to customize the **OWP_Change Job** rule to support a custom employee property, **Hire Date**, make changes in **Change Job Script 1**:

```
FIX("No Property")
        "OWP_Action" (
            IF ( @ISMBR( {Year}))
              IF ( "Fiscal TP-Index" >= @MEMBER(@CONCATENATE("HSP_ID_",
@HspNumToString({StartMonth})))->"Fiscal TP-Index")
                 "Hire Date"->{TargetJob} = "Hire Date";
               ENDIF
            ELSE
                "Hire Date"->{TargetJob} = "Hire Date";
            ENDIF
            ;
        )
        ENDFIX
```

4. Validate and deploy the associated rule or rules.

Post Update Tasks

After updating Workforce content from a monthly update, note the following information.

Enhancements available in certain releases include updates to some provided artifacts. If you haven't modified these artifacts, then the artifacts and features are available to you automatically with the release. Because customized artifacts are not updated during releases, if you have customized these artifacts and want to take advantage of the new features, review the information in the appendix Updating Workforce and Strategic Workforce Planning.

Also, check this appendix to see the list of new rules. To make new rules available to users, you must give users access to the rules. To do so, on the Home page, select **Rules**, the OEP_WFP cube, the new rule, and then the **Permission** icon.

October 2022

Perform these tasks immediately after updating the Workforce **October 2022** content:

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- All users must set values for two new user variables. These variables are required before you can use the Mass Update forms:
  - **Employee Parent**—Helps make forms more manageable by letting you include or exclude the employees to display on the forms based on the Employee Parent member you select, such as new hires or existing employees.
  - **Period**—Allows Comments for New Hires to be displayed as well as Total Compensation for all Employees on the Mass Update forms.
- Run the rule **OWP_Calculate existing employee compensation** or any of the **Synchronize** rules to ensure that merit is calculated correctly for part-time employees.
- Run the data map **Headcount and FTE Data for Reporting** to repopulate the data in the Workforce Reporting cube with the new detailed account data.

August 2021

Perform these tasks immediately after updating the Workforce **August 2021** content.

Adding Custom Dimensions to the Reporting Cube

In this update, for new applications, you have the option to choose whether to add custom dimensions to the reporting cube (OEP_REP) the first time you enable features.

For existing applications, you have a one-time option to add custom dimensions to the reporting cube the next time you enable features. **Before you enable features**, you must clear data in the OEP_REP cube.

To choose which dimensions are pushed to the reporting cube (OEP_REP), see Adding Custom Dimensions to the Reporting Cube:

- For new applications, you can perform this task only once, when you first enable features.
- For existing applications, you have a one-time option to perform this task the next time you make a change in **Enable Features** for either **Workforce** or **Strategic Workforce**.

Merit Assumptions

- Give users access to access to the new dashboard **Workforce and Merit Assumptions**.
- If you enabled **Merit Assumptions**, and you specify to plan at the **Global** level, the **Workforce and Merit Assumptions** dashboard uses **Company Assumptions**, and Entity is hidden. If you you specify to plan at the **Per Entity** level, the **Workforce and Merit Assumptions** dashboard uses Entity and **Company Assumptions** is hidden.
- For existing customers, if you enable **Merit Assumptions** and choose to plan by **Entity** or by **Global**, you must enter data for **Merit Rate**, **Merit Month**, and **Cut-off Date** at **Entity** or **Global** level. When you are loading data for existing employees using Data Management or Data Integration, these assumptions are copied to employees as part of the **Incremental Process Data with Synchronize** rule. Alternatvely, you can run **Process Loaded Data** whenever you update **Merit Month** or **Cut-off Date**.

Updated Employee Details Form

There is a new member, **Merit Increase**, in the **Component** dimension, which is assigned as a Smart List value for **Merit Account**. For existing customers, after updating content for 21.08, in the **Employee Details** form, the row heading for **Merit** displays **1** instead of the new Smart List value. To update the **Employee Details** form to display the new member, **Merit Increase**, run either the **Calculate Compensation** or **Synchronize** rule.

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February 2020

Immediately after updating the Workforce **February 2020** content, you must run the new rule **1X Populate New Properties** to convert existing Start Month data to the Start Date account. Run this rule only once for each Scenario and Version combination with data, immediately after updating content. Specify only Scenario and Version combinations whose data you want to recalculate. For example, you may not want to recalculate historical data.
For optimum performance, before running **1xPopulate New Properties**, change the FIX Parallel dimension to use the dimension that is appropriate to parallelize the process by moving the dimension from FIX statement to FIX Parallel and move the entity member selection to FIX statement in the place of the dimension that's moved to FIX Parallel statement. This change needs to be made in **OWP_Populate New Properties_T** template in Calculation Manager. Save the changes and then deploy the **OWP_Populate New Properties** rule.

> **Note**
>
> If you don’t run this rule immediately after updating, the consequence of running any rules is the possibility of losing some data. If you inadvertently run rules before running **1X Populate New Properties**, run **1X - Populate New Properties** and then rerun the rules that you previously ran.

May 2019

Immediately after updating the Workforce **May 2019** content, you must run the new rule **1X Copy Compensation Details from BegBalance to Periods**, which copies compensation details from the BegBalance member to all months. Run this rule only once for each active Scenario and Version combination with data, immediately after updating content. To run this rule, on the Home page, click **Rules**, then **All Cubes**, and then select OEP_WFSC from the **Cube** drop-down list. Then click **Launch** for the rule **Copy Compensation Details from BegBalance to Periods**.

February 2019

Workforce provides four forms for quickly updating and processing data on existing employees. Each form is associated with a Groovy rule that processes only the changed data. The forms are designed for optimal processing efficiency, depending on the kind of data being updated. You access these forms from the **Mass Update** tab. See Updating Employees and Jobs Details in *Working with Planning Modules*.

On these forms, all the Flex dimensions and the Entity dimension are initially on the Page. Oracle recommends that you analyze the form load performance and then modify the layout of these forms, moving certain dimensions from the Page to the rows based on your requirements. Year and Period are also on the Page; Oracle assumes you'll use the selected Year and Period for loading and processing the changed data. Your Year and Period selection is equivalent to the runtime prompt values for the **Process Loaded Data** rule.

To provide processing efficiency for multiple simultaneous users, the default parallelism for the Groovy rule is set to 2. However, if you don't provide access to these forms for planners or if you expect a low level of concurrency, then you can adjust a design-time prompt (DTP) value to increase the parallelism to 4. Doing so will increase processing speed for large-scale changes in data.

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July 2018

- Immediately after updating the Workforce **July 2018** content, you must run the new rule **One Time - Copy Rates to Months**, which copies rates from the BegBalance member to all months. Run this rule only once for each active Scenario and Version combination with data, immediately after updating content. To run this rule, on the Home page, click **Rules**, then **All Cubes**, and then select OEP_WFSC from the **Cube** drop-down list. Then click **Launch** for the rule **One Time - Copy Rates to Months**.
- For components configured with the **Payment Frequency** set to **One-time Pay**: Unless you select a **One-time Pay Option**, your component expenses continue to occur in the first month of your selected payment frequency.

Mapping Data for Reporting in Workforce

For complete reporting on data, Workforce provides data maps, which enable you to push consolidated data from one cube to a reporting cube. For example, you can push compensation data to the reporting cube.

Workforce also provides Groovy rules for administrators that execute these data maps. The Groovy rules execute the pre-defined data maps with runtime prompts for Entity, Scenario, and Version.

Table 6-7 Workforce Data Maps and Groovy Rules for Reporting

Data Map	Groovy Rule
Compensation Data for Reporting	Compensation Data for Reporting
Non Compensation Data for Reporting	Non Compensation Data for Reporting
Headcount and FTE Data for Reporting	Headcount Data for Reporting

You can modify existing data maps if needed, or create new ones for any customizations you make to the application. Synchronize or push data as needed. For more information about data maps, see Defining Data Maps in *Administering Planning*.

Workforce Rules

Run the Workforce business rules in the situations described here.

> **Tip**
>
> For suggestions on enhancing the execution performance of rules, see Performance Considerations for Strategic Workforce Planning Rules.

To launch a business rule, click **Actions**, then **Business Rules**, and then the rule.

Beginning with the 24.12 update, Workforce uses the following rules for all new applications:

- **Synchronize Defaults 2.0**—Run this rule after you update the entity defaults for a benefit, tax, or additional earning. For example, you set up a new benefit or removed an existing benefit from entity defaults. Running this rule from the New Hires or Manage Existing Employees form pushes the updated entity default at the employee-job level. If you launch

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Synchronize Defaults 2.0 using the right-click menu, you use it for a selected employee-job combination.

If you intend to execute the **Synchronize Defaults 2.0** rule for:

- Only one person, highlight the row containing that person's name, and then run the rule.
- Multiple people, or to select the dimensionality with a runtime prompt, right-click in the white space, and then run the rule.

- **Synchronize Definition 2.0**—Run this rule after you update an existing benefit, tax, or additional earning. For example, you updated a rate table, payment frequency, salary grade, or maximum value. Running **Synchronize Definition 2.0** pushes the updated component definition to employees and jobs. This rule doesn't update the entity defaults.
- **Process Loaded Data with Synchronize Defaults**—After you import new compensation data, run the rule **Process Loaded Data with Synchronize Defaults** to copy the data from the current/selected period to the future periods in the planning year range as well as apply the entity defaults for benefits, taxes, and additional earnings. Running this rule sets the Headcount to 1 and the Partial Payment Factor to 100% for every employee unless you've loaded different values at the processing month. Please note that this rule applies the entity defaults and calculate the benefits, taxes, and additional earnings at the employee-job combination, so there is no need to execute any additional rule in order to compute compensation for the employees.
- **Process Loaded Data with Synchronize Definition**—After you import new compensation data, run the rule **Process Loaded Data with Synchronize Definition** to copy the data from the current/selected period to the future periods in the planning year range as well as copy the properties and rates for benefits, taxes, and additional earnings being loaded to the employees. Running this rule sets the Headcount to 1 and the Partial Payment Factor to 100% for every employee unless you've loaded different values at the processing month. Please note that this rule copies the rates and calculate the benefits, taxes, and additional earnings at the employee-job combination, so there is no need to execute any additional rule in order to compute compensation for the employees.
- **Calculate Compensation for all 2.0**— Run this rule to calculate data across all entities or all employees or jobs within an entity.
- **Process Loaded Strategic Workforce Data**—Run this rule to copy the data from the current/selected period to the future periods in the planning year range.
- **Calculate Supply for All Data**—Run this rule to calculate Supply data across all entities or, all employees or jobs within an entity.
- **Calculate Demand for All Data**—Run this rule to calculate Demand data across all entities or all employees or jobs within an entity.

Prior to the 24.12 update, Workforce used the following rules. Oracle recommends that you update your application to use the new rules. For more information, see Performance Considerations for Strategic Workforce Planning Rules

- **Synchronize Defaults**—Run this rule after you update the entity defaults for a benefit, tax, or additional earning. For example, you set up a new benefit or removed an existing benefit from entity defaults. Running this rule from the New Hires or Manage Existing Employees form pushes the updated entity default at the employee-job level. If you launch **Synchronize Defaults** using the right-click menu, you use it for a selected employee-job combination.

  If you intend to execute the **Synchronize Defaults** rule for:

  - Only one person, highlight the row containing that person's name, and then run the rule.

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  - Multiple people, or to select the dimensionality with a runtime prompt, right-click in the white space, and then run the rule.

- **Synchronize Component Definition**—Run this rule after you update an existing benefit, tax, or additional earning. For example, you updated a rate table, payment frequency, salary grade, or maximum value. Running **Synchronize Component Definition** pushes the updated component definition to employees and jobs. This rule doesn't update the entity defaults.
- **Calculate Compensation**—When you update data on a form, to recalculate expenses, run the **Calculate Compensation** rule. For example, if you change an employee's status, review that employee's FTE, and then run **Calculation Compensation**.

  Run this rule to calculate compensation for an individual employee or job.
- **Calculate Employee Compensation for All Data** and **Calculate Job Compensation for All Data** (in a Job only model)— Run these rules to calculate data across all entities or all employees or jobs within an entity.
- **Process Loaded Data**—After you import new compensation data, run the rule **Process Loaded Data** to copy the data to the necessary periods in the planning year range. Running this rule sets the Headcount to 1 and the Partial Payment Factor to 100% for every employee unless you've loaded different values at the processing month.

> **Tip**
>
> You can quickly make changes to the source data for existing employees, entities, and jobs in four Workforce **Mass Update** forms. Each form is associated with a Groovy rule that processes only the changed data. See Updating Multiple Employees and Jobs Details in *Working with Planning Modules*.

> **Note**
>
> You can run the rules **Synchronize Defaults**, **Synchronize Component Definition**, and **Process Loaded Data** for multiple entities at a time by selecting the parent entity under Total Entity. Oracle recommends that for performance reasons, you run multiple instances of rules by selecting different children under Total Entity instead of running rules for all entities in one pass.

> **Note**
>
> If you get an error message about invalid data when running a business rule, see Troubleshooting a Rule's Error Message.

Groovy Templates used in Workforce

Make sure to set security for the Groovy templates used in Workforce:

- OWP_Add Requisition_GT—**Add Hiring Requisition** menu item
- OWP_Change Existing Details_GT—**Change Existing Details** and **Change Existing Employee Details** menu items
- OWP_Change Requisition_GT—**Change Requisition** menu item

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- OWP_Enable Job_GT

  —**Add Job** menu item
- OWP_Change Salary_GT

  —**Change Salary** menu item
- OWP_Incremental Process Data with Synchronize Definition_GT—Runs on save in form
- OWP_Incremental Process Data with Synchronize Defaults_GT—Runs on save in form
- OWP_Incremental Synchronize Defaults_GT—Runs on save in form
- OWP_Incremental Synchronize Definition_GT—Runs on save in form
- OWP_Copy Data across Entities_GT
- OWP_Copy Data Across Entities For Grades_GT

To set security for groovy templates:

1. From the **Home** page, click **Rules**, then **Filter**, and then select a cube and artifact type.
2. Next to the rule or template, click **Permission** and then click **Assign Permission**.
3. In **Assign Permission**, click **Permissions**, and then assign permissions. See Setting Up Access Permissions for more information.

FTE and Headcount Calculations

Headcount and FTE are both metrics for counting employees.

- Headcount is calculated as the actual number of employees.
- FTE, Full-Time Equivalent, is calculated as the number of full-time hours. A full-time employee has an FTE of 1.0. A part-time employee has FTE less than 1.0. Any employee's Headcount is always 1.0 as long as FTE is greater than 0.

FTE and Headcount might show different results if FTE is not a whole number for an Employee. FTE is rounded to the nearest integer. The only exception is for those greater than 0 but less than 1, FTE is always rounded to 1. For example, a 0.25 FTE is rounded up to 1.0 (even though 0 is the nearest integer, for headcount purposes, the employee still needs to be counted). For Jobs where FTE is 1.25, the headcount is rounded to the nearest integer of 1.0.

Checklist for Compensation Calculation

Use this checklist before calculating compensation to verify the minimum necessary prerequisites for successful compensation calculation.

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Table 6-8 Checklist for Compensation Calculations

Account	Checklist
Basic salary calculation	1. Check mandatory data load properties for **Employee and Job** model: • **OWP_FTE** • **OWP_Start Date** • **OWP_Applicable Union Code** • **OWP_Employee Type** 2. Check mandatory data load properties for **Employee** model: • **OWP_FTE** • **OWP_Start Date** • **OWP_Employee Type** • **OWP_Pay Type** 3. Check mandatory data load properties for **Job** model: • **OWP_Regular Headcount** • **OWP_Temporary Headcount** • **OWP_Contractor Headcount** • **OWP_Pay Type** • **OWP_Skill Set** 4. If salary grades are loaded, make sure salary basis and rates are available for grades.
Common check	If you change the planning and forecasting scenario range, ensure that the corresponding rates for salary, earnings, benefits, and taxes are available for the new range.
Merit calculation	1. Ensure that **Merit Rates** are available in the **Merit Rates** form, and employees are assigned a **Merit Month**. 2. If **Merit Assumptions** is enabled, ensure that **Cut-off Date** and **Merit Month** is available at the year level in the **Merit Assumptions** form. • If **Merit Assumptions** are set at the **Global** level, ensure that **Merit Month**, **Merit Rates** and **Cut-off Date** are available at the global entity level. • If **Merit Assumptions** are set at **Entity** level, ensure that **Merit Month**, **Merit Rates**, and **Cut-off Date** are available at the entity level.

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Table 6-8 (Cont.) Checklist for Compensation Calculations

Account	Checklist
Earnings, benefits, and taxes calculation	1. Ensure that Earnings, Benefits, and Taxes are configured and the rates have been entered in the Benefits and Taxes wizard. 2. Ensure that Entity defaults are set for earnings, benefits, and taxes. 3. For the **Custom Component Type**, review the custom formula for member **OWP_Custom Expense** to make sure there is no assignment to the **OWP_Expense Amount** member. 4. If you enabled **Split-Funded FTE**, ensure that data is loaded for **OEP_Home Entity**.
Transfer-related checks	**Source** and **Target** RTPs should not be same. At least one of the target dimensions should be different.

For information about resolving errors, see Resolving HSP_ID_xxxx Errors while Running Rules in Workforce in *Operations Guide*.

Performance Considerations for Strategic Workforce Planning Rules

Consider these best practice tips to potentially improve the execution performance of Workforce rules.

Beginning with the 24.12 update, if Hybrid Oracle Essbase is enabled, rules automatically determine the best `FIXPARALLEL` dimension at runtime.

If you were an existing customer before the 24.12 update and your environment has Hybrid Essbase enabled, you can take advantage of new rules that automatically determine the `FixParallel` dimension:

- Synchronize Defaults 2.0
- Synchronize Definition 2.0
- Process Loaded Data with Synchronize Defaults
- Process Loaded Data with Synchronize Definition
- Calculate Compensation for all 2.0
- Process Loaded Strategic Workforce Data
- Calculate Supply for All Data
- Calculate Demand for All Data

Oracle recommends that any customers who created applications prior to the 24.12 update modify the following Action menus to use the 2.0 version of the rules:

- Existing Actions
- New Hires Actions

Use the information in this topic if your environment does not have Hybrid Essbase enabled or if you are using the older version of the rules.

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- Workforce rules in environments without Hybrid Essbase enabled assume that the FIXPARALLEL statement runs on the Entity dimension, which is ideal if you're loading the bulk of your data into the Entity dimension. However, if you load the bulk of your data into another dimension, for example, a Flex dimension such as Project, you can improve performance by modifying the FIXPARALLEL statement to apply to the Project dimension instead. Workforce provides a template named **OWP_Fix Parallel_T** that is used in several rules and templates. See table Table 1 for a detailed list of rules and templates dependent on **OWP_Fix Parallel_T**. If you modify the FIXPARALLEL statement to reflect your optimal dimension, all dependent rules and templates take advantage of the performance improvement.

  > **Tip**
  >
  > To determine the best dimension to include in the FIXPARALLEL statement, Oracle recommends that you do some testing using realistic and representative data.

  To modify the template **OWP_Fix Parallel_T**:

  1. As an example, assuming you want to set Flex Dim1 instead of Entity as the dimension used in the FIXPARALLEL statement:
     a. Open the **OWP_Fix Parallel_T** template in Calculation Manager in the **OEP_WFP** cube.
     b. In **"Template Designer"**, select "Flex Dimension 1"->"FlexDim1Fix=,@RELATIVE(…" Design-time Prompts assignment object. Remove the leading comma from the right side of the Formula equation leaving only "@RELATIVE({FlexDim1},0)" from ",@RELATIVE({FlexDim1},0)".
     c. In **"Template Designer"**, select "Member selection of…" Design-time Prompts assignment object.
        i. Swap the right side of the formula equation for the FixParDimSel and FixStmtMbrSel formulae for "@RELATIVE({Department},0)" and "[FlexDim1Fix]", respectively.
        From

        ```
        FixParDimSel = @RELATIVE({Department},0)
        FixStmtMbrSel = {Scenario}, {Version} [FlexDim1Fix]
        [FlexDim2Fix] [FlexDim3Fix] [CurrencyDTP]
        ```

        To

        ```
        FixParDimSel = [FlexDim1Fix]
        FixStmtMbrSel = {Scenario}, {Version} ,@RELATIVE({Department},0)
        [FlexDim2Fix] [FlexDim3Fix] [CurrencyDTP]
        ```

        ii. Ensure a leading comma is placed before "@RELATIVE({Department},0)" which should now be in the FixStmtMbrSel formula.
     d. Save the template.

     Note: Fix Parallel can have multiple dimensions. You can have one or more dimensions on the right side of FixParDimSel in "Template Designer"->"Member selection of…". Choose the right dimensions from Entity, Employee, Job or custom dimensions enabled for best results.

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2. Redeploy the following rules and templates after modifying **OWP_Fix Parallel_T**.

Table 6-9 OWP_Fix Parallel_T Dependent Rules and Templates

Rule/Template	Name
Rule	OWP_Process Loaded Data
Rule	OWP_Process Loaded Strategic Workforce Data
Rule	OWP_Synchronize Defaults
Rule	OWP_Synchronize Definition
Template	OWP_Incremental Process Data with Synchronize Defaults_GT
Template	OWP_Incremental Process Data with Synchronize Definition_GT
Template	OWP_Incremental Synchronize Defaults_GT
Template	OWP_Incremental Synchronize Definition_GT

> **Note**
>
> – Test your changes in your Test instance before applying the changes in Production.
>
> – When you modify the template, ensure that the syntax (for example, the placement of commas) is valid and balanced by reviewing the Design-time Prompts (DTP).

- If your organization's usual practice is to run **Synchronize Defaults** immediately after running **Process Loaded Data**, you can reduce execution time by modifying the **Process Loaded Data** rule to substitute the **Synchronize Defaults** templates in place of the **Synchronize Definition** templates in the same relative positions. By doing this, you eliminate the execution time of the **Synchronize Definition** templates, which is unnecessary if you include the **Synchronize Defaults** templates in the **Process Loaded Data** rule because **Synchronize Defaults** includes the logic in **Synchronize Definition**.
- If you load the additional earning, benefit, and tax assignments directly from a source Human Resources or Payroll system, such as Oracle Fusion Human Capital Management, then you do not need to run **Synchronize Defaults** nor **Calculate Compensation**. Running **Process Loaded Data** is sufficient in this use case to calculate compensation for all the loaded data, because it includes **Synchronize Component Definition**.
- Oracle strongly recommends using the **Incremental Data Load** process using Data Integration for bulk-loading all Workforce data. This process is the most efficient and optimized solution to load and calculate your Workforce data. See Loading and Calculating Incremental Workforce and Strategic Workforce Planning Data.

About Groovy Business Rules

Groovy business rules allow you to design sophisticated rules that solve use cases that normal business rules can't solve; for example, rules to prevent users from saving data on forms if the data value is above a predefined threshold.

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> **Note**
>
> Groovy is an advanced customizable rules framework that comes with Cloud EPM Platform and is available with Enterprise Performance Management Enterprise Cloud Service along with Enterprise PBCS and PBCS Plus One. You can create and edit Groovy rules in:
>
> - Planning (including these application types: Custom, Module, Sales Planning, Strategic Workforce Planning, and Cash Forecasting)
> - Enterprise Profitability and Cost Management
> - Financial Consolidation and Close
> - FreeForm
> - Tax Reporting

You create Groovy rules in Calculation Manager and execute them from any place that you can execute a calc script rule in an application; for example, on the Rules page, within the context of a form, in the job scheduler, in dashboards, in task lists, and so on.

Groovy rules are also supported in rulesets. You can have a combination of calc script rules and Groovy rules within a ruleset.

Groovy rules are not supported in composite forms.

You can execute jobs of type rules, rulesets, and templates synchronously from a Groovy rule.

You can write Groovy scripts to run select EPM Automate commands directly in Oracle Fusion Cloud EPM, without installing EPM Automate client on a client machine. Refer to Running Commands without Installing EPM Automate and Supported Commands in *Working with EPM Automate* for information on which EPM Automate commands can be run using Groovy and example scripts.

Oracle supports two types of Groovy rules:

- Rules that can dynamically generate calc scripts at runtime based on context other than the runtime prompts and return the calc script which is then executed against Oracle Essbase.

  For example, you could create a rule to calculate expenses for projects only for the duration (start and end dates) of the project.

  Another example is a trend-based calculation that restricts the calculation to the accounts available on the form. You could use this calculation for various forms in Revenue, Expense, Balance Sheet, and Cash Flow. This allows for optimization and reuse.
- Pure Groovy rules that can, for example, perform data validations and cancel the operation if the data entered violates company policies.

Video

Your Goal	Watch This Video
Learn about training options for creating Groovy rules in Oracle Fusion Cloud Enterprise Performance Management.	Learning Groovy in Oracle Cloud EPM

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Workforce Groovy Rules

Workforce provides Groovy rules that execute pre-defined data maps with runtime prompts for Entity, Scenario, and Version. Additionally, these Groovy rules use the Years defined in the **Planning and Forecast Preparation** configuration task per Scenario. Conversely, the data maps execute for all Entities, all Versions, all Scenario, and all Years.

Table 6-10 Workforce Groovy Rules

Data Map	Groovy Rule
Compensation Data for Reporting	Compensation Data for Reporting
Non Compensation Data for Reporting	Non Compensation Data for Reporting
Headcount and FTE Data for Reporting	Headcount Data for Reporting

Only service administrators can execute these Groovy rules. Using the Groovy rules can improve performance by focusing the scope of the data to be pushed.

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7

Updating Strategic Workforce Planning and Workforce

When you update Strategic Workforce Planning, any custom modifications you have made are maintained. For example, any modifications to unlocked predefined artifacts (such as forms) are tracked internally. No changes are made to these modified artifacts during the update.

> **Note**
>
> If you plan to modify the navigation flow, make a copy of the Default navigation flow and edit your copy. Only inactive navigation flows can be modified. When you execute the monthly content update, Oracle applies the update to the original navigation flow and leaves your modified navigation flows unchanged.

Before updating, the application is put in maintenance mode and only administrators can use the application.

If any metadata changes are detected, the database is refreshed before content update. If any validation errors are detected, you must resolve the errors before you can update content.

Use the Job Console to review the errors.

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Part II

Working with Strategic Workforce Planning

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8

Task Overview

The Workflow for Strategic Workforce Planning

To analyze future workforce requirements using Strategic Workforce Planning, review the tasks you'll perform.

Video

Your Goal	Watch This Video
Learn about an overview of the workflow in Strategic Workforce Planning.	Entering Planning Data In Workforce for Oracle Enterprise Planning Cloud

In general, you'll perform tasks in this order:

1. Click **Strategic Workforce** .
2. Set up user variables.

   See Setting User Variables.
3. Assess the current FTE by job, individual employee information or job information, and (if **Average Compensation** is enabled) average compensation rates. Click **Overview** .

   See Skills Assessment Planning.
4. Review and update the assessment of employees across different skills and jobs. Click **Skills Assessment** .

   See Assessing and Updating Skills.
5. Plan the demands on your workforce. Click **Demand** .

   See Demand Planning.
6. Analyze the organization's supply of critical jobs and skills, factoring in such aspects as attrition. Click **Supply** .

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See Supply Planning.

7. Analyze and address any gaps between your workforce requirements (demand) and available resources (supply). Click **Gap Analysis** .

   See Analyzing the Gap Between Demand and Supply.

If your administrator also enabled Workforce, see The Workflow for Workforce.

Setting User Variables

After Strategic Workforce Planning features are enabled and configured, set the predefined user variables. Each user, including administrators, must select members for the provided user variables.

The members that you select for user variables set the initial POV (Point of View) when you open dashboards and forms. You can then can change the POV from within dashboards and forms, and their changes are then reflected in User Variables preferences.

To set user variables:

1. From the Home page, click **Tools** , and then **User Preferences** .
2. On the **User Variables** tab, select members for these user variables:
   - Currency
   - Entity
   - Job Type
   - Reporting Currency
   - Scenario—Set the scenario for Workforce
   - Scenario View—Set the scenario for Strategic Workforce Planning
   - Strategic Start Year and Strategic End Year—For Strategic Workforce Planning, limit skill set planning to a range of years by setting the start and end year
   - Version
   - Years

> **Note**
>
> For Workforce, set these additional user variables:
>
> - **Employee Parent**—Helps make forms more manageable by letting you include or exclude the employees to display on the forms based on the Employee Parent member you select, such as new hires or existing employees.
> - **Period**—Allows Comments for New Hires to be displayed as well as Total Compensation for all Employees/Jobs on the Mass Update forms.

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> **Note**
>
> Administrators can set limits for user variables by selecting **Tools**, then **Variables**, then **User Variables**, and then selecting members for the **User Variable Definition**. Administrators can further limit data entry by assigning permissions, setting variables, and creating valid intersections.

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9

Using Average Compensation Rates

Your administrator may have enabled **Average Compensation Rates** for jobs and seeded those rates for jobs that are defined as strategic. Or, you can enter average compensation rates for jobs by clicking **Overview** , and then **Average Compensation Rates**. These rates are multiplied by Total Demand FTE and Total Supply FTE, resulting in Supply Compensation and Demand Compensation.

With these rates defined for jobs, you can see the financial impact of adding or eliminating jobs.

> **Note**
>
> The values you enter here are not related to earnings calculations in Workforce.

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10

Skills Assessment Planning

After employee and job information is imported from a Human Resources system, review the information for existing employees who are assigned to strategic jobs, including their Employee Type, FTE, age (if **Age Based Retirement** is enabled), and primary skill set. If **Average Compensation** is enabled, you can review these rates and update them if necessary.

To review employee and job information, click **Strategic Workforce** , then **Overview** , and then the horizontal tabs.

Assessing and Updating Skills

If your administrator enabled Skills Assessment, you can rate employee skills for strategic jobs.

Video

Your Goal	Watch This Video
Learn about rating employee skills.	Strategic Workforce Planning | Rating Employee Skills in Strategic Workforce Planning

Evaluate and update skills by clicking **Strategic Workforce** , and then **Skills Assessment** . Then use its horizontal tabs:

- To assess the relative distribution and correlation of skills across years, click **Skills Summary**. Here you can graphically view Average Skills Comparison and Average Skills Correlation by Entity for each Scenario planning year.
- To assess the trend over years of skills by category, click **Skills by Category**. You can compare years, entities, and skills categories such as Management, Technical, and so on. You can also drill into categories to examine the underlying data. (Your administrator can add categories.)
- To assess and update skill proficiencies by the individuals holding specific jobs, click **Skills by Employee**. This form includes **Skills Gap** data, which is the difference in a skill level between the Strategic Start Year and Strategic End Year. For example, suppose that the

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Skills Gap for Rob Stark is -1, which indicates that you want his Java skill to be at a 4 (favorable) rating by FY18, and his Java skill is currently rated only as 3.

This form displays only those employees whose skill ratings already exist, usually by importing them. To add a skill and rating for an employee, see Adding Skills and Ratings for an Employee.

- To assess and update skill data for an individual, click **Employee Skill Details**.

Adding Skills and Ratings for an Employee

On the **Skills by Employee** form, you can add skills and ratings for an employee. To do so, click the employee's name, then right-click, and then select **Skill Assessment**. The **Skill Assessment by Employee** form opens, where the non-rated skills display. Populate the skill and save the form. The skill then displays on the **Skills by Employee** form.

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11

Demand Planning

Demand analysis gives you insight into what resources the long-term strategy requires, such as headcount or FTE and strategic jobs. This information helps you to be proactive in planning resources and preparing for their needed skill sets.

Video

Your Goal	Watch This Video
Learn about working with demand drivers.	Strategic Workforce Planning | Setting Up Demand Drivers in Strategic Workforce Planning

To work with demand data, click **Strategic Workforce** , and then **Demand** . Then use its horizontal tabs:

- For a graphical summary of the demand for strategic jobs, click **Summary Demand FTE**. You can view the totals by job and entity.
- To set and update the calculation logic for demand drivers and demand data by year, click **Demand Driver Data**. See About Demand Drivers.
- To provide granular information on demand drivers, click **Demand Data by Entity**. Here you set:
  - Assumptions to select a demand driver.
  - The calculation logic if you want to override the calculation logic set at the demand driver level on the **Demand Driver Data** form. This isn't required; you change the calculation logic here only if you want to override the calculation logic for a job.
  - The demand rate and scale. You enter the rate only for drivers whose calculation logic is **Demand = Driver / Rate** or **Demand = Driver * Rate** (or that uses Custom calculation logic, depending on how the formula is defined). **Demand Scale** applies only if **Demand Driver Scaling Factor** is enabled and if the calculation logic is based on **Previous Year's Ratio**.
  - Expected productivity for jobs if **Expected Productivity Gains Factor** is enabled. See Factoring Productivity Changes into Demand FTE.

  You can view demand data on either **Demand Data by Entity** or **Demand Data by Job**. On one form the Entity dimension is on the POV and the Job dimension is on the row. On the other form the Job dimension is on the POV and the Entity dimension is on the row. See Setting Demand Data by Entity or Job.

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> **Note**
>
> To focus your organization on certain forms and hide others, you can accomplish this using **Navigation Flows**. See "Designing Custom Navigation Flows" in *Administering Planning*.

- To view and adjust FTE by entity, click **Demand FTE by Entity**.
- To view and update demand data by job and entity, click **Demand Data by Job**. The charts at the bottom graphically depict Demand FTE and Headcount by year.
- To see, adjust, and calculate the total demand FTE by job by year, click **Demand FTE by Job**. If needed, update the data, then click **Actions**, and then **Calculate Demand**.
- If **Average Compensation** is enabled, you can see the calculated compensation for jobs based on the FTE calculations by clicking **Demand Compensation**. The calculated values on this form are read-only.

About Demand Drivers

On the **Demand Driver Data** tab, you set targets for demand drivers that reflect your industry. Here you enter demand data and see the impact of the demand over time. Suppose that you want to double revenue in the next few years. To support that, you'll need the right resources in the company: the right people with the right skills at the right time. You manage demand requirements by setting and manipulating demand drivers. Examples of demand drivers include revenue units, support representatives, production personnel, support calls, insurance policies, transactions, and so on.

Your administrator configures demand drivers when configuring Strategic Workforce Planning.

Setting Demand Data by Entity or Job

Different jobs might depend on different driver calculations, which in turn calculate the demand data. For example, Sales Representatives might be related to the revenue sales driver; for every $1,000,000 in revenue, you need one Sales Representative. The number of production line personnel might be derived from the units sold driver. Customer Support data might be related to the number of support calls.

You assign the demand driver that is appropriate for each strategic job on either the **Demand Data by Entity** or **Demand Data by Job** tab. One form has the Entity dimension on the POV with the Job dimension on the row, and the other has Job on the POV with Entity on the row. The two forms share the same data points and instructions for entering values. The only difference is that their axes are reversed for the Entity and Job dimensions.

On the **Demand Data by Entity** and the **Demand Data by Job** tabs, you can:

- Assign the demand driver that is appropriate for each strategic job.
- Optionally enter an override to the default driver calculation logic that is set at the demand driver level on the **Demand Driver Data** form. Change the calculation logic only if you want to override the calculation logic for a job.
- Enter an optional demand scaling factor if **Demand Driver Scaling Factor** is enabled and if the calculation logic is based on **Previous Year's Ratio**. See Scaling Demand FTE.
- Enter the demand rate for calculation logic based on **Demand = Driver / Rate** or **Demand = Driver * Rate** (or **Custom** calculation logic, depending on its logic).

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To assign demand drivers to jobs:

1. Click **Demand** .
2. Click **Demand Data by Entity** or **Demand Data by Job**.
3. Select the entity to work with and the job you want to assign a demand driver for.
4. Under **Assumptions**, select a demand driver.

   Your administrator defines the demand drivers when configuring Strategic Workforce Planning.
5. To override the default calculation logic that is set on the **Demand Driver Data** form, under **Calculation Logic**, select how to calculate the driver for a job:
   - **Previous Year's Ratio**
   - **Demand = Driver / Rate**
   - **Demand = Driver * Rate**
   - **Custom**
6. For drivers whose calculation logic is **Demand = Driver / Rate** or **Demand = Driver * Rate** (or **Custom**, depending on how it's defined), under **Demand Rate**, enter the rate. For example:
   - The Driver is Consulting Revenue, which is $15M
   - The Rate for the Job called Partner is $5M
   - So, for every $5M in Revenue, you need 1 FTE for the Partner Job
7. Under **Demand Scale**, enter a scaling factor.

   Demand Scale is available only if **Demand Driver Scaling Factor** is enabled, and applies only if the calculation logic is **Previous Year's Ratio** (or **Custom** calculation logic, depending on how it's defined). See Scaling Demand FTE.
8. Under **Expected Productivity**, enter a value to adjust your anticipated demand for strategic jobs by factoring in possible gains or losses in productivity.

   To indicate 25%, enter .25. **Expected Productivity** is available only if **Expected Productivity Gains Factor** is enabled. See Factoring Productivity Changes into Demand FTE.

Setting the Calculation Logic of Demand Drivers

On the **Demand Driver Data** tab, you set the demand calculation logic and the values of the demand drivers for each year.

To set the calculation logic for a driver that calculates the Demand FTE:

1. Click **Demand** .
2. Click **Demand Driver Data**, and under **Calculation Logic**, select one of the following:
   - **Previous Year's Ratio**: Bases the demand on the previous year's demand rate and applies the **Demand Scale** value if **Demand Driver Scaling Factor** is enabled and scaling is set. If no calculation logic is specified, then **Previous Year's Ratio** is

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applied. See Scaling Demand FTE and Factoring Productivity Changes into Demand FTE.

- **Demand = Driver / Rate**: Derives demand by dividing the driver by the rate. For example, for every $5 million in revenue, you need one partner.
- **Demand = Driver * Rate**: Derives demand by multiplying the driver by the rate. For example, multiply processing units by cost.
- **Custom**: Derives demand using a custom member formula on the dynamically calculated member *Demand FTE Custom*. If the predefined calculation logic doesn't fit your needs, your administrator can create a custom member formula using the Dimension Editor.

  For example, here's a simple member formula that returns the Demand FTE as 52:

```
IF ("OWP_Calculation Logic"->"OWP_Headcount Driver"->"No Year"-
>"Begbalance" == [OWP_Demand_CalcLogic.Custom]) "OWP_Demand FTE"->"No
Property" = 52; ENDIF;
```

> **Note**
>
> Refer to the *OWP_Demand FTE* account member in the formula because that member is used in forms. The member *Demand FTE Custom* isn't used in forms. Also, ensure that the formula is appropriate and doesn't impact performance.

3. Under **Demand Units**, enter the demand units (for example, the number of insurance policies or the number of revenue units).
4. Enter a value into **Demand Scale** to increase or decrease the calculated Demand FTE when using the **Previous Year's Ratio** calculation logic.

   If your administrator enabled the option **Demand Driver Scaling Factor**, you can use **Demand Scale** to scale your demand planning to account for a change in productivity over time. In calculating the future demand for FTE, demand scaling factors in natural logarithm as an exponent of the ratio. If you don't enter a **Demand Scale** value, the demand is assumed to be 100% of the demand driver. The demand scale applies to all jobs in the entity, regardless of whether the demand driver is based on Entity or Job. If a driver's calculation logic is not set to **Previous Year's Ratio** and you enter a value into **Demand Scale**, the value won't impact the demand calculations. (Custom calculation logic might be an exception to this rule, depending on how the formula is defined.) See Scaling Demand FTE.
5. Enter a value into **Expected Productivity** to further refine FTE calculations.

   If your administrator enabled **Expected Productivity Gains Factor**, you can adjust FTE calculations by setting a value in **Expected Productivity**. Regardless of the calculation logic selected, **Expected Productivity** is factored into Demand FTE calculations if **Expected Productivity Gains Factor** is enabled and a value entered. See Factoring Productivity Changes into Demand FTE.

Scaling Demand FTE

If your administrator enabled the option **Demand Driver Scaling Factor**, you can use **Demand Scale** to scale your demand planning to account for a change in productivity over time. In calculating the future demand for FTE, **Demand Scale** factors in natural logarithm as an exponent of the ratio.

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Enter a demand scale value to increase or decrease the calculated Demand FTE when using the **Previous Year's Ratio** calculation logic. (Demand scale applies only if you are using Previous Year's Ratio as the calculation logic.) Demand scale enables you to increase the demand driver without increasing the resources needed using the same ratio. For example, enter 80% to reduce the calculated Demand FTE by 20% when the demand driver doubles. If you don't enter a demand scale value, the scale is assumed to be 100% (that is, no scaling is applied).

A demand scale of n% means that for each time the demand driver doubles (for example, the number of calls to the Call Center), the productivity becomes n% of the previous year's Demand FTE, while factoring in a linear relationship of the demand scale effect.

For example, assume that FY17 is the baseline year with an FTE of 50 Call Center Operators handling 1,000 calls per year:

	FY17	FY18	FY19	FY20
Demand driver (Transaction type: number of calls)	1000	2000	3000	2500
Demand scale		80%	80%	80%
Productivity gain		0%	1%	1%
Demand FTE	50	80	104.2624	91.21628

You expect the demand driver (the number of calls to the Call Center) to double from FY17 to FY18, but the demand FTE (the number of Call Center Operators) doesn't likewise double. In this case, you assume that a year's experience increases the employees' efficiency. For each doubling of the demand driver, you need only 80% of the demand FTE value because you assume a 20% gain in productivity.

The formula that Strategic Workforce Planning uses to calculate Demand FTE while factoring in Demand Scale and Expected Productivity gains is:

```
((PY Total Demand FTE / PY Demand Units) * ((CY Demand Units/ PY Demand
Units)^(LN(CY Demand Scale)/LN(2))) * (1 – Expected Productivity)) * CY
Demand Units
```

where:

- `PY` = Previous Year
- `CY` = Current Year
- `LN` = Natural Logarithm

You can further refine FTE calculations by entering values in **Expected Productivity**. The calculation that determines the Demand FTE factors in the values you set for both Demand Scale and Expected Productivity.

See Factoring Productivity Changes into Demand FTE.

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Factoring Productivity Changes into Demand FTE

If your administrator enabled **Expected Productivity Gains Factor**, you can use the **Expected Productivity** value to account for the impact on the productivity of FTE beyond that of **Demand Scale**. For example, you plan to acquire a new automated system or improve a process, which improves productivity and reduces the impact on Demand FTE.

As an example, assume that FY16 is the baseline year with an FTE of 50 Call Center Operators handling 1,000 calls per year:

	FY16	FY17	FY18	FY19
Demand Driver (Transaction type: number of calls)	1000	2000	3000	2500
Expected Productivity		5%	5%	5%
Demand FTE	50	95	135.375	107.1719

You expect the number of calls to the Call Center (the demand driver) to double from FY16 to FY17, but you also plan to buy a new call answering system, which will increase productivity. You set **Expected Productivity** to 5% of the Previous Year's Ratio, which assumes a 5% productivity gain. So, doubling the number of calls (from 1,000 to 2,000) requires only 95% of the Previous Year's Ratio to meet the demand. The Demand FTE is decreased because the ratio that determines how many FTE are needed is based on the demand driver value (that is, the number of calls) and the Expected Productivity gains (that is, the new call answering system).

> **Note**
>
> The calculation that determines the Demand FTE factors in the values you set for both **Demand Scale** and **Expected Productivity**. See Scaling Demand FTE.

Viewing and Adjusting the Demand FTE

You can see a summary of the calculated demand FTE over years, based on your demand drivers and their calculation logic. You can also adjust the FTE, which affects the **Total Demand FTE** for each job. Adjustment FTE values are factored into the **Previous Year's Ratio** calculation logic.

To see a summary of or adjust the calculated FTE:

1. Click **Demand** .
2. Click **Demand FTE by Entity** or **Demand FTE by Job**.

   Demand FTE by Entity has the Entity dimension on the POV, with the Job dimension on the row. **Demand FTE by Job** has the Job dimension on the POV with Entity on the row.

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The two tabs share the same data and instructions for entering values. Their only difference is that their axes are reversed for the Entity and Job dimensions.

3. View the currently calculated FTE.
4. To adjust the FTE, enter an adjustment factor under **Demand FTE Adjustment**.

   For example, if you plan to hire 3 Engineers in the coming year, enter 3 in the cell for Engineer. Adjustments you enter on either **Demand FTE by Entity** or **Demand FTE by Job** are reflected in both tabs.

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Supply Planning

With supply planning, you look ahead at how your workforce resources will meet your workforce demands.

Video

Your Goal	Watch This Video
Learn about working with supply calculations.	Strategic Workforce Planning | Setting Up Supply Drivers in Strategic Workforce Planning

The Supply Headcount or FTE beginning balance for a given year is reduced by the previous year's retirement FTE. Retirement and attrition values negatively impact the Supply Headcount and FTE.

To work with supply data, click **Supply** . Then use its horizontal tabs:

- To see a graphical view of supply jobs and FTE, click **Summary Supply FTE**.
- To set attrition data by entity, click **Attrition Driver**. See Setting Attrition Drivers.
- To set the retirement age by entity and by year, click **Retirement Age**. See Setting Retirement Ages for Attrition Calculations.
- To set attrition data by age ranges, click **Attrition Data by Age Band**. See Setting Attrition by Age Band.
- To set attrition by job, click **Attrition Data by Job**. See Setting Attrition by Job.
- To see calculated FTE totals for strategic jobs by year, click **Supply FTE**.
- To see headcount totals for jobs, click **Supply Headcount**.
- To see supply compensation, click **Supply Compensation**. Supply compensation is calculated by multiplying the FTE for a job by its average compensation rate if **Average Compensation** is enabled.

Setting Attrition Drivers

Attrition drivers typically account for about 90% of employee turnover. Strategic Workforce Planning provides two attrition drivers by default:

- **Attrition by Job**
- **Attrition by Age** (if **Age-Based Retirement** is enabled). If **Age-Based Retirement** is enabled, then you can set the age for calculating attrition by retirement age.

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To set attrition drivers, click **Attrition Driver**, and then **Attrition by Job** or **Attrition by Age** (if the option is enabled).

See:

- Setting Retirement Ages for Attrition Calculations
- Setting Attrition by Age Band
- Setting Attrition by Job

Setting Retirement Ages for Attrition Calculations

Supply and Attrition FTEs are derived from the Retirement Age. If the calculated age of an employee is higher than the retirement age, then that affects retirement attrition by minus one. The Retirement Age applies to all jobs and employees in an entity.

With the **Employee and Job** level of granularity and the **Age-based Retirement** option enabled, retirement is calculated at the Employee and Job level of detail.

Setting Attrition by Age Band

If your administrator enabled **Age-Based Retirement** and imported the ages for employees, Workforce calculates their ages for the age band calculations. Click **Attrition Data by Age Band** to set attrition data by age band. For each year, you can enter the number of headcount/FTE you anticipate leaving the company. Because attrition data reduces supply resources, enter the data as negative percentages (for example, -.05). The data you enter here reduces the summary FTE.

Setting Attrition by Job

You can plan attrition data by job by clicking **Attrition Data by Job**. Enter the attrition values for jobs as negative percentages (for example, -.05). The data you enter here reduces supply resources.

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Analyzing the Gap Between Demand and Supply

After planning the resources your plans require (demand) and the resources that you expect to be available to meet those demands (supply), you can see how well they match up by looking at the gap between demand and supply. Then you can take action to minimize those gaps.

To view the gap between demand and supply, click **Gap Analysis** .

- To view the supply and demand summary data and their variance, click **Supply vs Demand**. In the top left form, you can view the data. In the charts, you can review the trends.
- To view the difference between supply and demand headcount, click **Supply vs Demand Headcount**. This information helps guide you in addressing the gap by updating your hiring or training plans. Examples:
  - Transfer people from non-strategic jobs to strategic jobs.
  - Add training courses to build strategic skills.
  - Hire people that have needed strategic skills.
  - Create incentive programs to retain people with strategic skills.

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14

Reporting in Strategic Workforce Planning

Related Topics

- Working with the Reports Reporting Solution
- Working with Legacy Financial Reports

Working with the Reports Reporting Solution

Reports is available in Strategic Workforce Planning alongside, and eventually replacing, Financial Reporting. Reports provides a user-friendly, robust report development framework along with an enriched report viewer experience.

Reports also includes books and bursting. Books provide the ability to group together one or more reports, books, and other documents, to generate a single PDF output. The bursting feature enables you to run a single report or book for more than one member of a single dimension for one data source, and publish a PDF output for each member. You can schedule a bursting definition as a Scheduled Job.

Reports, books, and bursting definitions are stored in the repository, along with Documents used and generated with Books and Bursting. For example, MS Word and PDF documents inserted in Books and CSV files used in a bursting definition, along with PDF files generated by a bursting definition.

You can migrate Financial Reporting reports to Reports either with in-place migration where you can migrate all or individual reports, or by importing Financial Reporting report files that were exported locally from the Explore Repository. Please note when migrating, the system will convert as many elements of the original report into the Reports equivalent as possible. However, there are differences between the two solutions, and not all elements exist in both solutions. You may have to modify certain elements after the report has been migrated in order to produce a report that is equivalent to the original report.

Financial Reporting will eventually be removed at some future undetermined date, after you have ample time to migrate your content from Financial Reporting to Reports.

To view the next-generation Reports, on the Home page, click **Reports**, and then click the **Reports** tab

on the left side of the page.

For more information, see:

- Working with Reports for Oracle Enterprise Performance Management Cloud
- Designing with Reports for Oracle Enterprise Performance Management Cloud

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Working with Legacy Financial Reports

Strategic Workforce Planning provides a comprehensive report authoring solution that enables you to quickly create dynamic and interactive reports in PDF, HTML, and Excel format. Accurate and timely reports based on real-time data are critical for planning and decision making at multiple levels in a sales organization.

The graphical interface of the report designer allows you to swiftly design report frameworks using objects. The wide range of formatting and design options give you maximum control on the layout of the report.

Power users build report definitions using the Report Designer. Power users assign access to viewers, who use these report definitions to generate reports.

Report definitions that are built using the report designer act as a framework to retrieve real-time data in reports.

In the Reporting Web Studio, you can design reports by inserting, positioning, and customizing objects such as grids, charts, textboxes and images.

The Reporting Web Studio provides:

- Different chart types
- Dynamic member selection
- Sorting
- Conditional formatting and suppression
- Zoom and drill to details
- Report linking
- Data source features such as:
  - Supporting detail
  - Cell text and file attachments
  - Drill to source data

You can preview reports any time from the report designer and save them as time-specific snapshots.

Once a report is designed, viewers such as regional or operations managers can view and interact with reports in HTML, PDF or Excel format. They can specify criteria for report data by selecting members for dimensions. They can also zoom and drill to access more information and they can download reports.

To design reports, from the Navigator , click **Reporting Web Studio**.

To work with reports, on the Home page, click **Reports**, and then click the **Financial Reports** tab on the left side of the page.

For more information, see:

- Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud.
- Working with Financial Reporting for Oracle Enterprise Performance Management Cloud

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Part III
Working with Workforce

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15

Task Overview

The Workflow for Workforce

If your administrator enabled both Strategic Workforce Planning and Workforce, first review the tasks you'll perform in Strategic Workforce Planning. See The Workflow for Strategic Workforce Planning.

In general, you'll perform Workforce tasks in this order:

1. Before creating or updating plans and forecasts, run these business rules: **Synchronize Defaults** and **Calculate Compensation**.
   Access these business rules from **Compensation Planning**, then **Manage Employees**, then **Existing Employees**.
2. Set up user variables.

   See Setting User Variables.
3. Review or enter workforce assumptions and defaults. Your administrator may have set up initial assumptions.
   Use **Compensation Planning**, then **Assumptions** and **Defaults**.
4. Update workforce details.
   See the table below.
5. Run the **Calculate Compensation** business rule again to recalculate values.
6. Review dashboards and analytics.
7. Report on data using data maps.

> **Note**
>
> You might not see all the features described in this section, depending on which features your administrator enabled.

To get started, click **Workforce** , and then select a component.

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Table 15-1 Strategic Workforce Planning Tasks

Tasks	Perform These Tasks	More Information
	• See an overview of compensation data • Manage new hires and existing employees • Manage employee details • Transfer employees from one entity to another • Set workforce assumptions (for example, hours worked per day) • Set the salary basis (for example, annual) and rate for Salary Grades • Set defaults for salary, additional earnings, benefits, and taxes	Managing Compensation Expenses
	• View the total of non compensation expenses • Enter or update non compensation expenses	Managing Noncompensation Expenses
	• See a headcount summary by demographic • See workforce expenses by demographic • Assign demographics to employees or jobs	Managing Demographics
	• See a dashboard summary of headcount and FTE (full-time equivalent) • Analyze compensation trends over time • View headcount and expenses by skill set • See an overview of utilization and staffing, by existing employees to hires	Analyzing Workforce Expenses

Setting User Variables

After Strategic Workforce Planning features are enabled and configured, set the predefined user variables. Each user, including administrators, must select members for the provided user variables.

The members that you select for user variables set the initial POV (Point of View) when you open dashboards and forms. You can then can change the POV from within dashboards and forms, and their changes are then reflected in User Variables preferences.

To set user variables:

1. From the Home page, click **Tools** , and then **User Preferences** .

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2. On the **User Variables** tab, select members for these user variables:
   - Currency
   - Entity
   - Job Type
   - Reporting Currency
   - Scenario—Set the scenario for Workforce
   - Scenario View—Set the scenario for Strategic Workforce Planning
   - Strategic Start Year and Strategic End Year—For Strategic Workforce Planning, limit skill set planning to a range of years by setting the start and end year
   - Version
   - Years

> **Note**
>
> For Workforce, set these additional user variables:
>
> - **Employee Parent**—Helps make forms more manageable by letting you include or exclude the employees to display on the forms based on the Employee Parent member you select, such as new hires or existing employees.
> - **Period**—Allows Comments for New Hires to be displayed as well as Total Compensation for all Employees/Jobs on the Mass Update forms.

> **Note**
>
> Administrators can set limits for user variables by selecting **Tools**, then **Variables**, then **User Variables**, and then selecting members for the **User Variable Definition**. Administrators can further limit data entry by assigning permissions, setting variables, and creating valid intersections.

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16

Managing Compensation Expenses

Before updating employee-related information, you can review current expenses trends and summaries by clicking or tapping **Compensation**, and then **Overview**.

Managing Hiring Requisitions

A hiring requisition adds placeholder expenses to the workforce budget until someone is hired to fill the requisition. When an employee is hired to fill the hiring requisition, the placeholder hiring requisition expense is transferred to and associated with the hired employee.

Hiring requisitions functionality is available if these Workforce features are enabled:

- Granularity type **Employee** or **Employee and Job**
- **New Hires** option under **Workforce Management**

When workforce demands exceed the number of available employees, you can use New Hires functionality to:

- Add a hiring requisition to be filled by an employee
- Change the status of a hiring requisition
- Associate a hiring requisition with an employee
- Remove hiring requisitions
- Calculate the resulting compensation expenses

Workforce initially provides 100 blank New Employee Hiring Requisitions, which you can use and then add more when you need to. To add a hiring requisition, use **Compensation Planning**, then **Manage Employees**, and then **Add Hiring Requisition** from **Actions**. (Use the same sequence for the other hiring requisition options.)

When you fill a hiring requisition by hiring an employee, you associate the hiring requisition with the employee. The reconciled FTE value equals the Hiring Requisition FTE value. In other words, the FTE and headcount is reduced for the hiring requisition and assigned to the associated employee.

To associate a hiring requisition to an employee:

1. Add a hiring requisition, if needed.

   See Adding Hiring Requisitions.

2. Associate the employee with the hiring requisition.

   This action transfers the FTE/headcount to the existing associated employee. The new hire requisition properties Reconciled FTE and Reconciled Headcount are populated. See Hiring Employees.

3. After the hiring requisition *available* FTE is assigned to an existing associated employee, you may opt to remove the hiring requisition because it no longer contributes to workforce compensation expenses.

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Adding Hiring Requisitions

When workforce demands exceed the number of available employees, you can add hiring requisitions to be filled by employees. You can create multiple requisitions simultaneously, set their FTE, their employee type, their time span, and their salary.

For an overview, see Managing Hiring Requisitions.

> **Note**
>
> This topic applies only to the **Employee** and the **Employee and Job** granularity options.

To add hiring requisitions:

1. Click **Compensation Planning**, then **Manage Employees**, and then **New Hires**.
2. Right-click and then select **Add Hiring Requisition**.
3. At **Requisition Details**, set these aspects, and then click **Next**:
   - Number of requisitions you're adding
   - **FTE** value for each
   - **Employee Type** (for example, **Regular**, **Contractor**, or **Temporary**)
4. For **Calendar Information**, select the **Start Date** and optionally the **End Date** to set when the requisition's expenses are to be included in expense calculations, and then click **Next**. Select the **End Date** if you know the end date for an employee. Specifying an ending period is especially useful for temporary employees; doing so saves you from having to plan their departure using the Plan Departure rule. Calculations for their workforce expenses then begin and end with their start and end dates. Note that if you use the ending period option, you must select both the end year and month.
5. If your administrator enabled merit-based planning for new hires, depending on the type of merit planning you are doing, you might be prompted for **Merit Month**. **Merit Month** specifies, for each year, the month in which to give a merit increase.
6. At **Job and Salary Options**, select options, and then click **Next**.
   - Which **Job** the requisition is for
   - Which **Union Code** the requisition is for
   - The option for setting the requisition's salary:
     - **Salary Defaults**: Select to set the salary based on the salary defaults, which are set on the **Defaults** tab of **Compensation Planning**.
     - **Salary Basis and Rate**: Select to directly enter the salary rate (for example, 6000) and basis (for example, Monthly).
     - **Salary Grade**: Select to set the salary by selecting a salary grade. Your administrator imports salary grades, and you set the defaults for new hires by selecting **Compensation Planning**, then **Assumptions**, and then **Salary Grades**. If you don't select a salary option, then the salary defaults are used. Selecting either **Salary Basis and Rate** or **Salary Grade** overrides any salary default assignments.

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7. Add any comments for the hiring requisition and then click **Next**.
8. Click **Launch**.
   The Additional Earnings, Benefits, Taxes, headcount, and so on are calculated for the specified requisitions during the time range you specified.

If needed, you can later change the Salary Rate, Salary Basis, Salary Grade, Status, or end period for a hiring requisition you've added. See Updating Hiring Requisitions. To update the salary after the to-be-hired (TBH) has been associated with a hired employee, see Updating Employee Compensation.

> **Tip**
>
> If you want to add many hiring requisitions at one time, you can use the **Process New Hires** Mass Update form. See Updating Multiple Employees and Jobs Details.

Updating Hiring Requisitions

After you've added a hiring requisition, you can update its status description, salary, or time span. You can also remove a requisition.

To update a hiring requisition:

1. Click **Compensation Planning**, then **Manage Employees**, and then **New Hires**.
2. To remove a requisition: Right-click the requisition to remove and then click **Remove Hiring Requisition**. When a requisition is deleted, its associated FTE/headcount and compensation expenses are no longer included in calculations.
3. To update a requisition: Right-click the requisition to update, and then click **Change Requisition**.
4. At **Change Requisition**, select the option that applies, and then click **Next**.
   - **Status**—Select to set an informational description to the requisition, and specify the **Effective Date** for the change. The new status is applied from the **Effective Date** onwards.
     - **New**
     - **Active**
     - **Approved**
     - **Unapproved**
     - **On-hold**
     - **Closed**—When you change a hiring requisition **Hiring Status** to **Closed**, you can specify an **Effective Date** for the change. The **End Date** for the closed hiring requisition is updated to be one day before the **Effective Date**. Compensation data is recalculated based on the **End Date**. Note that the **End Date** is populated based on the **Effective Date** for the **Closed** status but not for other statuses.

> **Tip**
>
> Don't enter an **Effective Date** that is before the requisition **Start Date**. Use the **Remove Hiring Requisition** rule to remove the requisition.

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- **Salary**—Select to update the salary basis, rate, or grade for the requisition. Skip to Step 5.
- **Extend Calendar**—Select to extend a requisition's time span. Calculations for a requisition's workforce expenses begin and end with the requisition's start and end dates. Skip to Step 5.
  You can change the start date or end date to extend a requisition's calendar.
- **Reduce Calendar**—Select to reduce a requisition's time span. Skip to Step 6.
  You can change the start date or end date to reduce a requisition's calendar.

5. To update the salary associated with the requisition:
   a. Select the **Year** and the **From Period** to set the effective date for your updates.
   b. Select the option for setting the salary:
      - **Salary Defaults**—Select to set the salary based on the salary defaults, which are set on the **Defaults** tab of **Compensation Planning**.
      - **Salary Basis and Rate**—Select to directly enter the salary rate (for example, 6000) and basis (for example, Monthly).
      - **Salary Grade**—Select to set the salary by selecting a salary grade. Your administrator imports salary grades, and you set the defaults for new hires by selecting **Compensation Planning**, then **Assumptions**—and then **Salary Grades**.
        If you don't select a salary option, then the salary defaults are used. Selecting either **Salary Basis and Rate** or **Salary Grade** overrides any salary default assignments.
6. To extend the time span for the requisition:
   a. In **Copy Properties from**, select the month to use as the basis for which requisition properties to copy to the extended range. This option enables you to carry forward into the extended range such aspects as FTE, Status, Employee Type, and Pay Type.
   b. Select the **Year** and **Month** to copy data from and the new **Start Date** and or **End Date**.
      You can extend a time span for a requisition by moving the start date earlier, moving the end date later, or a combination of both.

      Specifying a start date and end date saves you from having to plan their departure using the Plan Departure rule.

      You don't have to enter a **Start Date** or **End Date**.

      If you don't select a **Start Date**, Workforce uses the existing **Start Date**.

      If you don't select an **End Date**, Workforce applies this hiring requisition from the start date to the end of the planning range.
7. To reduce the time span of the requisition, select the **Start Date** and or **End Date**.
   You can reduce a time span for a requisition by pushing the start date later, moving the end date earlier, or a combination of both.

   You don't have to enter a **Start Date** or **End Date**.

   If you don't select a **Start Date** or **End Date**, Workforce uses the existing **Start Date** or **End Date**.
8. Click **Launch**.
   The Additional Earnings, Benefits, Taxes, headcount, and so on are calculated for the specified requisitions during the time range you specified.

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> **Tip**
>
> If you want to update many hiring requisitions at one time, you can use the **Process New Hires** Mass Update form. See Updating Multiple Employees and Jobs Details.

Updating Employee Compensation

Depending on your application's granularity, on **Employee Details**, you can update such information as salary, Performance Ratings, FTE, Employee Type, Union Code, and Demographics.

> **Tip**
>
> You can also quickly update and process data on multiple existing employees. See Updating Multiple Employees and Jobs Details.

To view and update employee compensation:

1. Click **Compensation Planning**

   , and then **Employee Details**

   .
2. To update an employee's salary, select the employee from the POV, and then:
   a. Right-click in the grid, and then select **Change Existing Details**.
   b. From **Change Employee**, select **Salary**, and then click **Next**.
   c. Select the **Year** and **From Period** as the effective date for the updated salary.
   d. From **Salary Options**, select:
      - **Salary Defaults**: Select to set the salary based on the salary defaults, which are set on the **Defaults** tab of **Compensation Planning**.
      - **Salary Basis and Rate**: Select to directly enter the salary rate (for example, 6000) and basis (for example, Monthly).
      - **Salary Grade**: Select to set the salary by selecting a salary grade. Your administrator imports salary grades, and you set the defaults for new hires by selecting **Compensation Planning**, then **Assumptions**, and then **Salary Grades**. If you don't select a salary option, then the salary defaults are used. Selecting either **Salary Basis and Rate** or **Salary Grade** overrides any salary default assignments.
   e. Click **Launch**.
      The employee's salary is calculated during the time range you specified.

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Changing an Employee's Status

To change an employee's status:

1. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**.
2. Right-click the employee in the row, and then select **Change Existing Details**.
3. From **Change Employee**, select **Status**.
4. Select the pertinent information, including the new status:
   - **Active**—The employee's workforce expenses are included fully in workforce calculations.
   - **Disability**—The employee's workforce expenses are not calculated for the specified period.
   - **Leave of Absence**—The employee's workforce expenses are not calculated for the specified period.
   - **Maternity**—The employee's workforce expenses are calculated according to the Partial Payment Factor, set in assumptions. The Partial Payment Factor sets the pay percentage to apply to the employee's salary. To set this percentage in assumptions, click **Compensation Planning**, and then **Assumptions**.
   - **On Sabbatical**—The employee's workforce expenses are not calculated for the specified period.
5. Select the year, month, and duration in months of the status. You can also add a comment.

Changing an Employee's Job

You can change the job assignment for an existing employee, for example to promote them, demote them, or move them to a different job. This option is available in an **Employee and Job** model.

To change the job for an existing employee:

1. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**.
2. Right-click the employee whose job you want to change, and then select **Change Job**.
3. Enter the details for the job change, and then click **Launch**.
   - **Start Month**—Select the month in which the job change should occur.
   - **Select Source Job**—Select the source job the employee is changing from.
   - **Select Target Job**—Select the target job the employee is changing to.
     The target job can't be the same as the source job. If the **Source Job** and **Target Job** are the same, the rule fails.
   - **Hours per week**—Optionally, enter the hours per week for the changed job.
     If you don't change **Hours per week**, the **Source Job** hours per week are used in the **Target Job**.
   - **Enter FTE**—Enter the FTE for the **Target Job**.
   - **Year**—Enter the year for the job change.

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- **Comments**—Optionally, add any comments related to the job change, for example the reasons for the change. The comments are displayed on the Mass Update forms, **Process Data and Synchronize Defaults** and **Process Updated Data**.

When the **Change Job** rule runs:

- Compensation data is automatically calculated for the **Target Job** as of the changed job month and year.
- All properties are cleared in the **Source Job** as of the changed job month and moved to the **Target Job**. The compensation data is also cleared as of changed job month in the **Source Job**.

Updating Multiple Employees and Jobs Details

To quickly update and process data on multiple existing employees or jobs and then process the updated data in Workforce, you can use the **Mass Update** forms.

Using **Mass Update** forms enables you to quickly review and edit information after data is loaded. Designed for optimal processing efficiency, each form is associated with a Groovy rule that processes only the changed data. Which form you use depends on the kind of data you're updating.

You can change existing properties or add a new record and then apply configured default assignments. You can change existing properties or add a new record and then override default assignments and rates. After modifying salary, you can re-apply configured default assignments for benefits, additional earnings and taxes. You can override default assignments and then apply the configured defaults.

Video

Your Goal	Watch This Video
Learn about how to update employee and job information and then process the updated data.	Performing Employee and Job Mass Updates in Oracle Enterprise Planning Cloud

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
This 45-minute tutorial shows you how to update and process data on multiple existing employees or jobs and then process the updated data in Workforce using Mass Update forms.	Performing Employee and Job Mass Updates

To quickly make changes to existing employees, jobs, and entity defaults:

1. Click **Compensation Planning**

   , and then **Mass Update**

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.

2. Select the form that best suits your situation:

> **Note**
>
> Each granularity option (Employee, Job, or Employee and Job) supports the following forms and Groovy rules. However, the Employee model supports updating only employees, and the Job model supports updating only jobs.

Table 16-1 Forms for Making Mass Updates

Your Objective	Use This Form / Tab	The Groovy Rule that is Run Upon Save
• Assign updated entity defaults for benefits, taxes, and additional earnings, based on employee or job driver details • Update employee properties, job properties, or salary-related information • Calculate the non-salary components based on the definition of components in the Benefits and Taxes Wizard	**Process Data and Synchronize Defaults** When you make updates on this form: • The updates are copied to all future periods in the Year Range. • Applies the entity defaults with the component definition and rates in the Benefits and Taxes Wizard.	**Incremental Process Data with Synchronize Defaults**
• Update, add, or remove an existing benefit, tax, or additional earning • Update employee properties or job properties • Calculate the non-salary components based on the definition of components in the Benefits and Taxes Wizard	**Process Updated Data** When you make updates on this form: • The updates are copied to all future periods in the Year Range. • Compensation is calculated based on the rates entered in the form.	**Incremental Process Data with Synchronize Definition**

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Table 16-1 (Cont.) Forms for Making Mass Updates

Your Objective	Use This Form / Tab	The Groovy Rule that is Run Upon Save
• Assign updated entity defaults for benefits, taxes, and additional earnings based on employee or job driver details by changing the **Process** option to **Yes** for the employees or jobs to which you want to apply the updated entity defaults • Change the salary, basis, and rate for an employee • Calculate the non-salary components based on the definition of components in the Benefits and Taxes Wizard	**Synchronize Defaults** When you update salary details for the selected year and month in the POV on this form: • The updates are copied to all future periods in the Year Range. • The entity defaults are reapplied and recalculated based on the modified salary.	**Incremental Synchronize Defaults**
• Apply any changes across component information (such as rate changes, payment frequency, or maximum value type) for the benefit, tax, or additional earning by changing the **Process** option to **Yes** for the employees or jobs • Update, add, or remove an existing benefit, tax, or additional earning • Calculate the non-salary components based on the definition of components provided in the Benefits and Taxes Wizard	**Synchronize Definitions** When you change the assignments of earnings, benefits or, taxes and corresponding options and tiers: • The updates are copied to all future periods in the Year Range. • Compensation is recalculated based on the component definition and rates in the Benefits and Taxes Wizard.	**Incremental Synchronize Definition**
• Add new hiring requisitions • Modify hiring requisitions **Note:** This form is applicable when **Granularity** is either **Employee** or **Employee and Job**.	**Process New Hires** Compensation is recalculated when you save the form.	**Incremental Process Data with Synchronize Defaults**

Tips about Mass Update forms:

- Depending on the year selected, you can make updates at the monthly, quarterly, or annual level, depending on the periodicity for the selected year defined in **Planning and Forecast Preparation**. If you enter data at any quarter, compensation is calculated from the first month of that quarter onwards. If you enter data at the yearly level, compensation is calculated from the first month of the application.
- You can select a value for the user variable **Employee Parent** to show either hiring requisitions, existing employees, or both.

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- **Process Data and Synchronize Defaults** and **Process Updated Data** forms: At least one Employee/Job intersection must exist on the POV before you can add another Employee/Job row to the forms using the Select Member list.
- You can change the **Start Date** and **End Date** for employees (new hires and existing employees) on Mass Update forms. When you save the form, compensation is calculated for the modified rows.
- You can use Mass Update forms to inactivate multiple employees at one time by entering an **End Date**. When you use this method:
  - Employees' status is changed to **Closed**.
  - Headcount and Compensation numbers are cleared for future periods of Plan Departure month.
  - FTE and Merit month information are not cleared for future periods (including future years) of Plan Departure month.
- Alternatively, you can use **Plan Departure** to plan employee departure one at a time. When you use this method:
  - The employee status is changed to **Departed** or **Resigned**.
  - FTE, Headcount, and Compensation are cleared for future periods of Plan Departure month.

For more information about **Plan Departure**, see Planning an Employee's Departure.

Hiring Employees

When you hire an employee, you associate the employee with an existing hiring requisition.

When you hire an employee, you add them as a member to the Employee dimension. Then you associate the employee to a hiring requisition (TBH), which assigns their FTE and headcount to the application. (For information on hiring requisitions, see Managing Hiring Requisitions). After you reconcile the new employee with a hiring requisition, you manage the employee's workforce information on the **Existing Employees** form.

To associate a newly hired employee with a hiring requisition:

1. Click **Compensation**, then **Manage Employees**, and then **New Hires**.
2. Right-click the hiring requisition to associate with the new hire, and then select **Associate Employee**.

   The new employee's compensation expenses are added to the totals, and the headcount and compensation expenses for the hiring requisition are cleared.

Planning an Employee's Departure

When an employee resigns or is terminated, to stop their associated compensation expenses from being included in calculations as of their departure month, use **Plan Departure**.

To plan an employee's departure:

1. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**.
2. Select the employee.
3. Click **Actions**, and then **Plan Departure**.

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4. Select the month and year in which the updated employee status should be active, the reason the employee is leaving, and add optional comments.
5. Click **Launch**.
   The employee's workforce expenses aren't included in calculations beginning with the departure month.

> **Note**
>
> Alternatively, you can use Mass Update forms to inactivate multiple employees at one time, although there are differences in status and how expenses are calculated. For more information, see Updating Multiple Employees and Jobs Details.

To undo an employee's departure:

1. Run the **Change Existing Employee Details** rule for the employee, select **Status** to change and set it to **Active** from the month the employee departed.
2. Run the **Process Loaded Data** rule for the employee, and for the **Period**, select one month before the month the employee departed.

Transferring Employees

Transferring an employee changes the department (or entity) against which their compensation expenses are calculated. Managers transfer employees using either of these processes:

- One-step Transfer—Use the **Transfer** rule if you own both the source and target entities (that is, you have access permissions to the source and target entities).
- In a **Job** only application, use the **Transfer Headcount** rule. When you run the **Transfer Headcount** rule, compensation data is automatically calculated.
- Two-step Transfer—Use the **Transfer Out** and **Transfer In** rules if you don't have access permissions to both the source and target entities. The two-step transfer provides security. For example, it ensures that managers in Department A can't see member data for Department B if they don't have access permissions to the Department B entity. You should transfer out an employee during the same month in which the receiving department transfers in the employee.
- After an employee is transferred out, most of their data is cleared in the source as of the transfer month. **Applicable Union Code**, **Employee Type**, **Pay Type**, and **Status** will remain but the **Status** will show as **Transfer Out**. When the employee is transferred to the target, the status is set to **Active** for the target, and the employee's salary is calculated in the target.
- You can transfer an employee across custom dimensions, entities, and job in a one-step or two-step transfer. While transferring an employee from one source to another source, select the target dimension(s) and month for transfer. At least one target dimension must vary from the source or the transfer will fail. Use **Basic Details** to select core dimensions. Click **Additional Details** to select custom dimensions. The same applies to transferring headcounts in Job only models also.
- When planning an employee’s transfer, make sure you enter a new month that is in accordance with your application’s fiscal calendar, rather than the dates entered for the new hire. Employee transfer is based on fiscal year and month rather than the dates entered for new hire.

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- In the source's transfer year, most of the employee properties, including FTE and Headcount, are cleared out starting in the transfer month. **Applicable Union Code**, **Employee Type**, **Pay Type**, and **Status** will remain but the **Status** will show as **Transfer Out**.
- If the employee transfer month is after the merit month in the year of transfer, merit rates are copied from the source. For subsequent years in the target entity, merit rates are calculated based on the target rates. When the employee is not active, the recommended merit rate is not populated. If the employee transfer month is before the merit month, merit rates are copied from the target.
- FTE Assumption and Headcount Assumption accounts are used to calculate values and should never be used for reporting purposes. Use the Total FTE and Total Headcount account hierarchies for all reporting needs, as these reflect the accurate values based on the assumptions, transfers, departures, and so on.

To use the two-step employee-transfer process:

1. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**.
2. Click the **Actions** gear, and then **Transfer Out**.

   Transfer Out causes the employee's name to be displayed in the **Review Pending Transfers** form.
3. To transfer the employee into the target department, in **Review Pending Transfers**, select the employee, then **Actions**, and then **Transfer In**.

> **Tip**
>
> Oracle recommends that you review pending transfers before approving a plan.

To undo an employee's transfer:

1. Run the **Change Existing Employee Details** rule for the employee, select **Status** to change and set it to **Active** from the month employee was transferred at the source.
2. Run the **Process Loaded Data** rule for the employee, and for **Period**, select the month before the month the employee transferred at the source.
3. Delete the data or take the steps needed to clear the data of the employee at the target.

Managing Jobs

If the application is based on the **Job** granularity option, you can use the **Add Job** rule to add jobs and the **Change Salary** rule to change the salary for jobs. The changes are effective from the period and month that you specify.

> **Tip**
>
> When you update job data on a form, to recalculate expenses, click the **Actions** gear, and then run the **Calculate Job Compensation** rule. For example, if you change a job's status, review that job's FTE and then run **Calculate Job Compensation**.

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Adding Jobs

You can add jobs and set their properties if the application is based on the **Job** granularity option.

To add jobs:

1. Click **Compensation Planning**, and then **Manage Jobs**.
2. Specify the POV.
3. Click the **Actions** gear, and then select **Add Job**.
4. On **Job Details**:
   - In **Job**, click the Member Selector, and then select the position.
   - Enter the full-time equivalent in **FTE**.
   - Enter the number of **Regular**, **Contractor**, and **Temporary** headcount for the job.
   - Click **Next**.
5. On **Calendar Information**, select the **Start Year** and **Start Month** for the job, and then click **Next**.
6. On **Pay Type, Skill Set, and Salary Options**, select these options:
   - **Pay Type**—for example, Exempt or Non-exempt
   - **Skill Set**—for example, Java or Management
   - **Salary Options**:
     - **Salary Defaults**: Select to set the salary based on the salary defaults, and then click **Launch**.
       Salary defaults are set on the **Defaults** tab of **Compensation Planning**.
     - **Salary Basis and Rate**: Select this option, and then click **Next** to directly enter the **Salary Rate** (for example, 6000) and select the **Salary Basis** (for example, Monthly). Then click **Launch**.
     - **Salary Grade**: Select to set the salary by selecting a salary grade, and then click **Next** to select the grade. Then click **Launch**.
       Selecting **Salary Grade** bypasses the default assignments and instead uses the Salary Grade Basis and Rates at the specific level 0 Entity member or the Company Assumptions Entity member. Salary grades are set on the **Assumptions** tab of **Compensation Planning**.

A message confirms that you successfully added the job. The expenses for the job are calculated starting from the start month and year you specified.

> **Note**
>
> Because jobs are members in the Job dimension, you can't remove a job through the Workforce interface. Instead, the administrator can delete the job member using the Dimension Editor. Alternately, you could repurpose an existing job.

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Changing a Job's Salary

If the application is based on the **Job** granularity option, you can change the salary of jobs and specify which period and year the change takes effect using the **Change Salary** rule.

To change a job's salary:

1. Select **Compensation**, and then **Manage Jobs**.
2. Specify the POV and click on the job to change.
3. Click the **Actions** gear, and then **Change Salary**.
4. At **Salary Options**:
   - From the **Year** Member Selector, select the effective year for the change.
   - From the **From Period** Member Selector, select the effective month or period for the change.
   - From **Salary Options**, select how to set the salary:
     - **Salary Defaults**: Set the salary based on the salary defaults, and then click **Launch**.
     - **Salary Basis and Rate**: Select this option, and then click **Next** to directly enter the **Salary Rate** (for example, 6000) and select the **Salary Basis** (for example, Monthly). Then click **Launch**.
     - **Salary Grade**: Select to set the salary by selecting a salary grade, and then click **Next** to select the grade. Then click **Launch**.
       Selecting **Salary Grade** bypasses the default assignments and instead uses the Salary Grade Basis and Rates at the specific level0 Entity member or the Company Assumptions Entity member.

       Salary grades are set on the **Assumptions** tab of **Compensation Planning**.

A message confirms that you've successfully changed the job's salary. The expenses are calculated for the job starting from the start month and year you specified.

Planning Merit Rates

Merit rate increases are added to salary calculations. You can plan merit rates for employees using these methods:

- Based on the employee's performance rating, for example, Meets Expectations, Exceeds Expectations, or No Merit. (Your administrator can create or import performance ratings.) This merit planning option is available only for existing employees.
- By setting default percentage rates by entity in the **Default Merit** member. If the performance rating isn't set for an employee (you can set and view performance ratings on the **Employee Details** form) or if you want to plan merit rates at a more generic level, you can set default percentage rates for merit increases by entity. The merit increase for the year is included in the base salary calculations of that year and is carried forward into the base salary for subsequent years.
  This method is particularly useful when managers don't yet have performance information, for example, when planning merit increases for future years. To simplify planning when merit rates are the same across entities, you can also copy merit rates from one entity to another using the rule **Copy Merit Rates**.

  This merit planning option is available for new hires and existing employees.

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- When planning using **Merit Assumptions** at the **Per Entity** level, you plan by default merit rate, merit month, and cut-off date. Typically your administrator sets these assumptions. This merit planning option is available for new hires and existing employees.

To set merit rates:

1. Click .
2. Click **Assumptions**, and then **Merit Rates**.
3. From the Point of View links, select the Scenario, Version, and Entity.
4. Set merit rates using the method you prefer:
   - In the performance rating row, enter the merit percentage rate.
   - If no performance rating is set, enter the merit percentage rate in the **Default Merit** row. This value is used in salary calculations only if the performance rating is blank. **Optional**: To copy the merit rates from one entity to another, run the rule **Copy Merit Rates** from the **Actions** menu. At the rule's prompt, select the parent or child entity member whose merit rate you want to copy and the target level 0 member to copy the rate to. Selecting a source parent member enables you to easily push merit rates. Even after you've copied a merit rate to another entity, you can still overwrite the rate in the **Merit Rates** form.

   > **Note**
   >
   > Merit rates must be set at the level 0 entity level, whether they're based on performance rating or the **Default Merit** member. If managers enter merit rates at the company Assumptions (No Entity) member, the rates aren't effective until they're copied or added to specific level 0 child members of Total Entity. Individual entity owners can use the rule **Copy Merit Rates** and then modify the rates if needed.

5. Click **Actions**, and then **Synchronize Component Definition**.
   Running this rule recalculates tax thresholds that may change as a result of merit increases for employees.

Calculating Compensation Expenses

Whenever you update data in Workforce, to recalculate expenses, you must run the **Calculate Compensation** rule. Click **Actions**, and then **Calculate Compensation**.

> **Note**
>
> If you get an error message about invalid data when running a business rule, see Troubleshooting a Rule's Error Message.

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Synchronizing Defaults

You must run the **Synchronize Defaults** business rule when entity defaults are added or existing defaults are changed. Running **Synchronize Defaults** pushes the updated configuration information so that form calculations are based on the updated information.

To run **Synchronize Defaults**, select **Actions**, then **Business Rules**, and then **Synchronize Defaults**. If you launch **Synchronize Defaults** using the right-click menu, you should use it for a selected employee-job combination.

If you intend to execute the business rule for:

- Only one person, highlight the row containing that person's name, and then run the business rule.
- Multiple people, or to select the dimensionality with a runtime prompt, highlight a blank row and then run the business rule.

> **Note**
>
> When an existing salary grade, benefit, tax, or additional earning is updated, to push the updated definitions to employees and jobs, run the **Synchronize Component Definition** business rule. This business rule doesn't update entity defaults.

> **Note**
>
> After new data has been imported, run the business rule **Process Loaded Data** to copy the data to the necessary periods in the planning year range. Running this business rule copies the information from the substitution variables &CurYr and &CurMnth.

> **Tip**
>
> To quickly update and process data on multiple existing employees or jobs, you can use the **Mass Update** forms. Each form is associated with a Groovy rule that processes only the changed data. See Updating Multiple Employees and Jobs Details.

> **Note**
>
> If you get an error message about invalid data when running a business rule, see Troubleshooting a Rule's Error Message.

Troubleshooting a Rule's Error Message

To make it easy for you to work with data, Workforce extensively uses Smart List drop-down lists. Smart Lists that are defined with the property **Create from Members** use text data (the

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member names), not the Smart Lists' numeric ID. If a Smart List in your application mistakenly has numeric data or is missing data, you get an error message when you run a predefined business rule such as Process Loaded Data or Synchronize Defaults.

To find and fix incorrect Smart List values:

1. Click **Compensation Planning**, and then **Defaults**.
2. Review the Entity defaults on the **Salary**, **Additional Earnings**, **Benefits**, and **Taxes** tabs.

   Check to see if there's invalid data (numeric instead of text data) related to employee properties and compensation.
3. To make sure there are no invalid Smart List values at the employee and job combination, click the **Validate** tab .

   If there's numeric data for a Smart List, your administrator can fix this error by reloading the data for that employee and job combination or by adding the missing member to the hierarchy. Then you can select that member from the Smart List drop-down list. Or, you can select another Smart List value that fits your needs.

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Managing Noncompensation Expenses

You manage noncompensation expenses such as training or travel expenses using **Other Expenses** .

- To view a summary of expenses, click **Summary**.
- To add or update noncompensation expenses, click **Non Compensation Expenses**.

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Managing Demographics

Demographics describe employee attributes that are unique to each individual, such as Ethnicity, Gender, Religion, Veteran Status, Highest Education Degree, and Age Band. Analyzing demographics can help:

- Ensure fairness in hiring
- Address talent gaps as older employees retire
- Examine how many employees and what skill sets your future projects require

To view and update demographics, for example, to set an attribute for a new employee, click **Demographics**. Then:

- To see a graphic summary of headcount by demographic, click **Headcount Overview**.
- To see a graphic summary of workforce expenses by demographic, click **Workforce Expenses Overview**.
- To set a demographic by employee and job, click **Employee Demographics**.
  To ensure correct calculations in the dashboards, on the **Demographics by Employee** form, you can select any demographic member, including the Unspecified Demographic member. However, avoid selecting a No_<*demographic_member_name*> member, for example, No Highest Education Degree, No Age Band, or No Gender.

> **Note**
>
> Your administrator sets up which demographics the organization tracks.

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Analyzing Workforce Expenses

So that you can see the big picture of headcount, compensation, trends, skills sets, and so on, Workforce provides predefined dashboards. From a dashboard, you can drill to the detail data by clicking or tapping links. You can also perform *what-if* analysis in many ways. For example, change a value in the grid and see its immediate effect in the chart.

To access an analysis dashboard, in Workforce, click **Analysis** and then explore the data presented on the vertical tabs.

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A

Importing Data

Before importing data, configure the application as described in this help system and import the dimensional metadata.

You can download data import templates from within the application. The templates are generated based on the features you've enabled and the custom dimensions that were added.

To download the data import templates:

1. From the Home page, click **Application** and then click **Configure**.
2. From the **Configure** list, select the module for which you want to download templates, and then from the **Actions** menu, select **Download Data Load Templates**.
3. Save the ZIP file locally, and then extract the CSV files.

Perform these tasks to import data:

1. Specify the appropriate data import settings. See Administering Data Load Settings.
2. **Optional**: Make a backup copy of the data import templates to which you can revert, if necessary.
3. **Optional**: Back up the application.
4. If you created custom Smart Lists, import them before the associated data (available only for some modules.)

   To identify the Smart List to import and their entry names:

   a. Click **Navigator** , and then from **Create and Manage**, click **Smart Lists**.

   b. Select the Smart List, click **Edit**, and then **Entries**.

   c. Note the associated names.
5. Open the templates in Microsoft Excel and customize them to specify your business data.
6. **Optional**: To ensure that your data will import and calculate correctly, import it into a test application first.
7. Import the data into your production application.
8. For the first data import, run the rules required to process and calculate the data.

When customizing the templates:

- Don't enter zeros.
- To import data, you must have at least one member from all dimensions in the file to import.
- Remove columns for which you have no data. For example, if your periodocity is monthly, you can delete columns for Qtrly 1 - 4.
- If member names start with zeros (0), change numeric columns to text.

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Importing Strategic Workforce Planning Data

You can download Strategic Workforce Planning data import templates from within the application. The templates are generated based on the features you've enabled and the custom dimensions that you added when you enabled features. See Importing Data.

The templates reflect the **CurYr** that you set in the **Planning and Forecast Preparation** configuration task. After importing your data and refreshing the cube, run the rule **Process Loaded Strategic Workforce Data** to copy the data to the necessary periods in the planning year range.

The prefix of each template name depends on the application's granularity:

- `EJ_` precedes template names for **Employee and Job** applications. For example: `EJ_SWPDemandDataLoad_Plan.csv`.
- `JO_` precedes template names for **Job**-only applications. For example: `JO_JobPropertiesDataLoad_Plan.csv`.

> **Note**
>
> If your application is multicurrency, import data into the No Currency member. (The import templates are formatted to include the No Currency member for multicurrency applications.) If you've enabled **Average Compensation**, also import average compensation rates at No Currency in the entity. Also, Oracle assumes that you load Actuals historical data instead of entering or calculating it.

You can import properties and OWP_FTE to any month and year because the **Process Loaded Strategic Workforce Data** rule prompts for the starting point. However, skills assessment data, demand, and supply data are all loaded to BegBalance.

After importing data, run the **Process Loaded Strategic Workforce Data** rule.

Importing Demand Units for Demand Drivers

Use `EJ_SWPDemandDataLoad_Plan.csv` to import demand units for demand drivers.

Importing Rates for Demand Drivers and Demand FTE

Use `EJ_SWPDemandDatabyJob_Plan.csv` to import demand rates for demand drivers and demand FTE. To consider the Previous Year Ratio demand calculation, import this data for the year prior to the Plan Start Year.

If you are performing skill set planning, beginning with Release 21.08, you can load data only once to the Workforce cube (OEP_WFP), and then use a data map (Headcount and FTE Data for Reporting) to push the data to the Reporting cube (OEP_REP).

Previously, you were required to load FTE for Supply Planning, Demand Planning, and Workforce Planning to the Workforce cube (OEP_WFP), and for skill set planning you were required to load to the Reporting cube (OEP_REP). This required you to load the same value in two different places.

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Importing Employee Information, FTE Per job, Entity, and Year to the Reporting Cube

Use `EJ_EmployeeFTEDataLoad_REP.csv` to import employee information, FTE per job, entity, year to the OEP_REP reporting cube. This information is the basis for deriving the average skill rating across different skill categories.

Importing Employee Skills Assessment Data

Use `EJ_EmployeeSkillAssessmentDataLoad_Plan.csv` to import skill assessment ratings for employees across different skills in the reporting cube. This information is the basis for deriving the average skill rating across different skill categories.

Importing Attrition Data by Job

Use `EJ_SWPAttritionDatabyJob_Plan.csv` to import values for attrition by job.

Importing Demand Data by Job

Use `EJ_SWPDemandDatabyJob_Plan.csv` to import values for demand data by job.

Importing New Hires

Importing Properties for New Hires

Use `EJ_NewHiresPropertiesDataLoad_Plan.csv` to import properties for new hires.

Importing Job Properties

Use `JO_JobPropertiesDataLoad_Plan.csv` to import job properties.

Importing Attrition Data by Job

Use `JO_SWPAttritionDatabyJob_Plan.csv` to import attrition data by job.

Importing Demand Data by Job

Use `JO_SWPDemandDatabyJob_Plan.csv` to import demand data by job.

If you are performing skill set planning, beginning with Release 21.08, you can load data only once to the Workforce cube (OEP_WFP), and then use a data map (Headcount and FTE Data for Reporting) to push the data to the Reporting cube (OEP_REP).

Previously, you were required to load FTE for Supply Planning, Demand Planning, and Workforce Planning to the Workforce cube (OEP_WFP), and for skill set planning you were required to load to the Reporting cube (OEP_REP). This required you to load the same value in two different places.

Importing Demand Units for Demand Drivers

Use `JO_SWPDemandDataLoad_Plan.csv` to import demand units for demand drivers.

About Importing Employee and Job Properties

Employee and Job properties provide the basis for Supply FTE data, before attrition. Whether you've enabled only Strategic Workforce Planning, only Workforce, or both, the application relies on the properties data in the import templates `JO_JobPropertiesDataLoad_plan.csv` or `EJ_EmployeePropertiesDataLoad_Plan.csv`. After importing with the appropriate properties file and running the rule **Process Loaded Strategic Workforce Data**, the

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information is available in Strategic Workforce Planning. To see the data, click **Overview**, and then **Review Employee Information** or **Review Job Information**.

If your application is single currency and both Strategic Workforce Planning and Workforce are enabled, you only need to import the properties file once. When you run the rule **Process Loaded Strategic Workforce Data**, the data is copied from the Year and Month in the file to years in yearRange. (Strategic Workforce Planning has a substitution variable, OWP_SWPYearRange.)

If your application is multicurrency and both Strategic Workforce Planning and Workforce are enabled, you must import the properties files twice, once to include the currency member for Workforce and again at the No Currency member for Strategic Workforce Planning. Run the **Process Loaded Strategic Workforce Data** rule and **Process Loaded Data** after each import.

If you've also enabled Workforce, see Importing Workforce Data.

Video

Your Goal	Watch This Video
Watch this video to learn how to integrate data between Oracle HCM Cloud and Workforce or Strategic Workforce Planning using Data Integration. Integrating selected data from your Oracle HCM Cloud application allows you to prepare workforce plans using data directly from your Oracle HCM Cloud as the basis for your plan.	Integrating Oracle HCM Cloud with Workforce Planning

Importing Workforce Data

You can download Workforce data import templates from within the application. The templates are generated based on the features you've enabled and the custom dimensions that you added when you enabled features. See Importing Data.

Only load data to accounts that are part of the data load templates.

> **Note**
>
> If you want to load only changed and new Workforce data since the last load, you can improve load performance using Data Integration. See Loading and Calculating Incremental Workforce and Strategic Workforce Planning Data.

> **Note**
>
> You can bulk load new hire data using Data Integration. For more information, see Bulk Loading Workforce New Hire Data in *Administering Data Integration*.

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> **Note**
>
> As of the February, 2020 Release, Workforce supports a new **Start Date** property. The data import templates include headers and examples for loading data such as Hire Date to OWP_Start Date rather than to OWP_Start Month. You can still load data to Start Month, and the Process Loaded Data rules convert the data to Start Date using the first of the month provided in the Start Month account. So, existing data integrations based on Start Month data continue to work. You'll get more accurate calculations, however, if you load data into Start Date.

The templates reflect the **CurYr** that you set in the **Planning and Forecast Preparation** configuration task. After importing your data and refreshing the cube, run the rule **Process Loaded Data** to copy the data to the necessary periods in the planning year range.

The prefix of each template name depends on the application's granularity:

- `EJ_` precedes template names for **Employee and Job** applications. For example: `EJ_EmployeePropertiesDataLoad_Plan.csv`.
- `EO_` precedes template names for **Employee**-only applications. For example: `EO_EmployeePropertiesDataLoad_Plan.csv`.
- `JO_` precedes template names for **Job**-only applications. For example: `JO_JobOtherCompensationDataLoad_Plan.csv`.

Importing Employee Properties

Use these templates to import properties for existing employees:

- `EmployeePropertiesDataLoad_Plan.csv`—Import plan properties for employees. (You don't need to load Headcount and Partial Payment Factor unless you want to explicitly set these values. If you don't load Headcount and Partial Payment values, they're set to 1 and 100% respectively for every employee.)

  > **Note**
  >
  > For the `EJ_EmployeePropertiesDataLoad_Plan.csv` template, don't load to *No Union Code* or to *OWP_All Union Code*. Instead add and use new child metadata member of *Total Union Code*. Otherwise, the synchronize rules may not work properly.

- `EmployeePropertiesDataLoad_Actuals.csv`—Import actual properties for employees.

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> **Note**
>
> You can use `EJ_EmployeePropertiesDataLoad_Plan.csv` and `EO_EmployeePropertiesDataLoad_Plan.csv` to load employee master FTE data to **OEP_Home Entity**. Data loaded at **OEP_Home Entity** is copied to future periods in the load year (starting from the data load month) and future years when you run **Process Loaded Data**.
>
> You must enter or import the Master FTE value for each employee if you enable **Split-Funded FTE**.

Importing Employee Compensation

Use `EmployeeSalaryDataLoad_Plan.csv` to import data used to calculate salary.

Importing Actual Employee Compensation

Use `EmployeeCompensationDataLoad_Actuals.csv` to import actual compensation data for employees.

To use this template, set these **Data Load Settings**:

1. From the Home page, click **Navigator** , and then under **Integration**, click **Data Load Settings**.
2. Set these parameters for importing data:
   - **Data Load Dimension**: Account
   - **Driver Dimension**: Period. Member: BegBalance,ILvl0Descendants(YearTotal)
   - **Data Load Dimension Parent**:
     - OWP_Total Earnings. **Driver Dimension Unique Identifier**: BegBalance
     - OWP_Total Benefits. **Driver Dimension Unique Identifier**: BegBalance
     - OWP_Total Taxes. **Driver Dimension Unique Identifier**: BegBalance

Importing Employee Other Compensation Data

Use `EmployeeOtherCompensationDataLoad_Plan.csv` to import other compensation data—benefits, taxes, and additional earnings—for employees.

`OWP_Value` is an optional field. If you include the rate value in the template, that rate is copied to the planning year range for the specified employee.

Importing Salary Grades

Use `Salary Grade-Basis.csv` and `Salary Grade-Value.csv` to import salary grades into Assumptions.

Importing Properties and Rates for Additional Earnings, Benefits, and Taxes

Use these templates as examples when importing properties and rates for additional earnings, benefits, and taxes into the Benefits and Taxes Wizard.

- `Earnings,Benefits and Taxes-Properties.csv`—Import properties for additional earnings, benefits, and taxes.

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- `Earnings,Benefits and Taxes-Rates.csv`—Import rates for additional earnings, benefits, and taxes.

Importing Job Properties

Use `JobPropertiesDataLoad_Plan.csv` to import job properties.

Importing Job Salaries

Use `JobSalaryDataLoad_Plan.csv` to import salaries for jobs.

Importing Job Other Compensation Data

Use `JobOtherCompensationDataLoad_Plan.csv` to import other compensation data for jobs: benefits, taxes, and additional earnings.

Video

Your Goal	Watch This Video
Watch this video to learn how to integrate data between Oracle HCM Cloud and Workforce using Data Integration. Integrating selected data from your Oracle HCM Cloud application allows you to prepare workforce plans using data directly from your Oracle HCM Cloud as the basis for your plan.	Integrating Oracle HCM Cloud with Workforce Planning

Loading and Calculating Incremental Workforce and Strategic Workforce Planning Data

At the beginning of a planning cycle, you might load the entire data for a given scenario and version. However, to stay up to date with Human Resources changes, you can import new and updated information frequently. Processing and calculation performance is greatly improved when you load updated data into Workforce or Strategic Workforce Planning using Data Integration.

Data Integration functionality enables you to compare a source data file with a previous version of the source data file and load only records that are new or have changed since the last load. The Incremental File Adapter in Data Integration identifies the data that needs loading. Additionally, Workforce or Strategic Workforce Planning provides rules that dynamically generate the appropriate calculation script, depending on the changed and new data in the data load file and calculates only the data for the modified intersections.

After the Data Integration load process, the changed and new data displays in the appropriate Workforce or Strategic Workforce Planning forms. The data reflects calculations applied in the load process.

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> **Note**
>
> Whenever you load data from Data Integration, to copy data to future periods, you must select one of these Workforce or Strategic Workforce Planning rules.
>
> - **OWP_Incremental Process Data and Synchronize Defaults**
> - **OWP_Incremental Process Data and Synchronize Definition**
> - **OWP_Incremental Process Data With Strategic Workforce**

Loading incremental Workforce or Strategic Workforce Planning data and processing Workforce or Strategic Workforce Planning Incremental rules (for example, **OWP_INCREMENTAL PROCESS DATA WITH SYNCHRONIZE DEFAULTS**) can only be done by Administrators. When running any of the Workforce or Strategic Workforce Planning Incremental rules from Data Integration, ensure that the Data Integration **Target** option **Enable Data Security for Admin Users** is set to **No**. This option can only be set by an administrator.

For more information, see Loading Data Using an Incremental File Adapter in *Administering Data Integration*.

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B

Updating Workforce and Strategic Workforce Planning

After updating Workforce and Strategic Workforce Planning content from a monthly update, note the following information.

Overview

Enhancements available in certain releases, described here, require updates to some provided artifacts.

During the update process, the process loads dimensions and Calculation Manager artifacts that have been updated.

- If you haven't modified these artifacts (described in this topic), the artifacts and features are available to you automatically with the release.
- Because customized artifacts aren't updated during a new release, if you've customized these artifacts and want to take advantage of the new features, perform these steps:

1. Perform a full backup after the update and download it locally.
2. Review the list of modified artifacts and consider whether the enhancements in the monthly update address the modifications you've made to artifacts. Evaluate whether you want to restore the modified artifacts to take advantage of the new features, and whether you will need to reapply some or all of your modifications.

> **Tip**
>
> For any artifacts listed below that you have modified, consider creating a copy of your modified artifact and using that as a reference for the changes you made to it.

> **Note**
>
> Obsolete artifacts remain available for your use but will no longer be enhanced and could be removed from active forms, menus, dashboards, and so on.

3. After the update, reverse the customizations to the artifacts you've identified to restore the artifacts to the provided format. See Reversing Customizations.
4. Reimplement your customizations to the artifacts, if necessary.
5. For any restored Calculation Manager rules or templates, after they are final, be sure to deploy the updated rules or templates to the application for any impacted artifacts. See Showing the Usages of a Custom Template and Deploying Business Rules and Business Rulesets.

Also, check this appendix to see the list of new rules. To make new rules available to users, you must give users access to the rules. To do so, on the Home page, select **Rules**, the OEP_WFP cube, the new rule, and then the **Permission** icon.

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June 2026

The following information describes new and modified artifacts in the June 2026 update.

Table B-1 June 2026

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Synchronize Defaults_T • OWP_Synchronize Definition_T • OWP_Assign Target Defaults	
Rules	• OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_Process Loaded Data • OWP_Change job • OWP_Transfer	

October 2025

The following information describes new and modified artifacts in the October 2025 update.

All new and existing customers should run the **Calculate Supply** rule to populate data for **Supply Headcount**.

Table B-2 October 2025

Artifact Type	Modified Artifacts	New Artifacts
Account	• OWP_Basic Salary • OWP_Earning1 to OWP_Earning30 • OWP_Benefit1 to OWP_Benefit30 • OWP_Tax1 to OWP_Tax30	
Scenario	OWP_Forecast	

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Table B-2 (Cont.) October 2025

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Change Existing Details_T • OWP_Add Requisition_GT • OWP_Add Requisition_T • OWP_Assign Defaults_T • OWP_Incremental Process Data with Synchronize Defaults_GT • OWP_Incremental Process Data with Synchronize Definition_GT • OWP_Incremental Synchronize Defaults_GT • OWP_Incremental Synchronize Definition_GT • OWP_Process Loaded Data_T • OWP_Calculate Supply	
Data Storage Properties	OWP_Supply HeadCount—Changed from **Dynamic Calc** to **Store**	
Member Formulas	OWP_Average Skill Assessment	

December 2024

The following information describes new and modified artifacts in the December 2024 update.

Perform these tasks after updating the Workforce and Strategic Workforce Planning **December 2024** content:

If you were an existing customer before December 2024 and your environment has Hybrid Oracle Essbase enabled, you can take advantage of new rules that automatically determine the `FixParallel` dimension.

Modify the following Action menus to use the 2.0 version of the rules:

- **Existing Actions**
- **New Hires Actions**

Workforce rules:

- Synchronize Defaults 2.0
- Synchronize Definition 2.0
- Process Loaded Data with Synchronize Defaults
- Process Loaded Data with Synchronize Definition
- Calculate Compensation for all 2.0

Strategic Workforce Planning rules:

- Process Loaded Strategic Workforce Data
- Calculate Supply for All Data

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- Calculate Demand for All Data

Table B-3 December 2024

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Calc_Acc_Periodicity • OWP_Calculate Employee Compensation_Te • OWP_Calculate Job Compensation_T	• OWP_Incremental Process Data with Strategic Workforce_GT • OWP_Synchronize Defaults_GT • OWP_Synchronize Definition_GT • OWP_Process Loaded Data with Synchronize Defaults_GT • OWP_Process Loaded Data with Synchronize Definition_GT • OWP_Calculate Compensation for all_GT • OWP_Process Loaded Strategic Workforce Data_GT • OWP_Calculate Demand_for All Data_GT • OWP_Calculate Supply for All Data_GT • OWP_Calculate Supply_GT • OWP_Calculate Demand_GT • OWP_Aggregation SWP_GT
Rules	• OWP_Calculate New Hire Compensation • OWP_Calculate Existing Employee Compensation • OWP_Calculate Job Compensation • OWP_Process Loaded Strategic Workforce Data	OWP_Incremental Process Data With Strategic Workforce
Action Menus	• OWP_Existing Actions • OWP_New Hires Actions	
Forms	• OWP_Average Compensation Rates • OWP_Manage Existing Employees • OWP_New Hire - Request • OWP_Review Employee Information • OWP_Review Job Information • OWP_Manage Existing Jobs	

May 2024

The following information describes new and modified artifacts in the May 2024 update.

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Table B-4 May 2024

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Synchronize Definition_T • OWP_Synchronize Defaults_T • OWP_Process Loaded Data_T • OWP_Calculate Employee Compensation_Te • OWP_Assign Defaults_T • OWP_Assign Target Defaults • OWP_Change Existing Details_T • OWP_Custom Template	
Dimension Members	OWP_Calculated Max Value OWP_AGE OWP_Age Band	

October 2023

The following information describes new and modified artifacts in the October 2023 update.

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Table B-5 October 2023

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Add Requisition_T • OWP_Assign Defaults_T • OWP_Assign Target Defaults • OWP_Associate Employee • OWP_Calculate Employee Compensation_Te • OWP_Calculate Job Compensation_T • OWP_Change Existing Details_T • OWP_Change Job • OWP_Enable Job_T • OWP_Plan Departure_T • OWP_Process Loaded Data_T • OWP_Synchronize Defaults_T • OWP_Synchronize Definition_T • OWP_Transfer_T • OWP_Transfer Heacount_T • OWP_Transfer In_T • OWP_Transfer Out_T • OWP_Incremental Process Data with Synchronize Defaults_GT • OWP_Incremental Process Data with Synchronize Definition_GT • OWP_Add TBH (Deprecated rule removed for new applications) • OWP_Change Employee Status (Deprecated rule removed for new applications) • OWP_ChangeHiringRequisitionStatus (Deprecated rule removed for new applications)	

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Table B-5 (Cont.) October 2023

Artifact Type	Modified Artifacts	New Artifacts
Forms	• OWP_New Hire - Request • OWP_Manage Existing Employees • OWP_Identify Invalid Data • OWP_Identify Invalid Data_JO • OWP_Process Data and Synchronize Definition • OWP_Process Data and Synchronize Definition_JO • OWP_Process Data with Synchronize Definition • OWP_Process New Hires • OWP_Process Data and Synchronize Defaults • OWP_Process Data and Synchronize Defaults_JO • OWP_Process Data with Synchronize Defaults	
Member Formulas	• OWP_Basic salary • OWP_Merit	
New Members Added in Account Dimension		• OWP_Earning11 to OWP_Earning30 • OWP_Benefit11 to OWP_Benefit30 • OWP_Tax11 to OWP_Tax30
New Members Added in Property Dimension		OWP_Workforce Members For Forms (Shared hierarchy)

May 2023 Update

The following information describes new and modified artifacts in the May 2023 update.

Table B-6 May 2023

Artifact Type	Modified Artifacts	New Artifacts
Forms	• OWP_Process Data and Synchronize Definition • OWP_Process Data and Synchronize Defaults	

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Table B-6 (Cont.) May 2023

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Change Job • OWP_Transfer Heacount_T • OWP_Process Data and Synchronize Defaults • OWP_Transfer_T • OWP_Transfer Out_T • OWP_Change Existing Details_T • OWP_Change Requisition_GT • OWP_Process Loaded Data_T • OWP_Plan Departure_T • OWP_Assign Defaults_T • OWP_Assign Target Defaults • OWP_Change Existing Details_T • OWP_Synchronize Defaults_T • OWP_Synchronize Definition_T • OWP_Assign Target Defaults • OWP_Change Existing Details_T • OWP_Synchronize Defaults_T • OWP_Synchronize Definition_T	OWP_Custom Template

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Table B-6 (Cont.) May 2023

Artifact Type	Modified Artifacts	New Artifacts
Global RTP		Department—Global RTP created at the rule level for these rules: • OWP_Add Benefit Defaults • OWP_Add Earning Defaults • OWP_Add Salary Defaults • OWP_Add Taxes Defaults • OWP_Copy Rates across Years • OWP_Copy Rates from Periodicities • OWP_Remove Compensation Defaults • OWP_Associate Employee • OWP_Change Job • OWP_Transfer In • OWP_Strategic Headcount • OWP_Add Job • OWP_Calculate Demand • OWP_Calculate Demand for All Data • OWP_Calculate Supply • OWP_Calculate Supply for All Data
Global RTP		DepartmentFrom—Global RTP created at the rule level for these rules: • OWP_Remove Hiring Requisition • OWP_Transfer Out
Account Members	Formulas were updated for these members: • OWP_Contractor Headcount • OWP_Temporary Headcount • OWP_Other Headcount • OWP_Regular FTE • OWP_Contractor FTE • OWP_Temporary FTE • OWP_Other FTE	

November 2022 Update

The following information describes new and modified artifacts in the November 2022 update.

Table B-7 November 2022 Update

Artifact Type	Modified Artifacts	New Artifacts
Groovy Templates		OWP_Process Master Data_T

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October 2022 Update

The following information describes new and modified artifacts in the October 2022 update.

Review the following important information about artifacts you might have customized:

- If you have modified the Calculation Manager template for **OWP_Change Existing Details_T**, but not the Groovy template (**OWP_Change Requisition_GT**), you must restore the Calculation Manager template.
- If you have modified the Calculation Manager template for **OWP_Enable Job_T**, but not the Groovy template, you must restore the Calculation Manager template.

For information about restoring artifacts, see Reversing Customizations.

Perform these tasks immediately after updating the Workforce **October 2022** content:

- All users must set values for two new user variables. These variables are required before you can use the Mass Update forms:
  - **Employee Parent**—Helps make forms more manageable by letting you include or exclude the employees to display on the forms based on the Employee Parent member you select, such as new hires or existing employees.
  - **Period**—Allows Comments for New Hires to be displayed as well as Total Compensation for all Employees on the Mass Update forms.
- Run the data map **Headcount and FTE Data for Reporting** to repopulate the data in the Workforce Reporting cube with the new detailed account data.
- Run the rule **OWP_Calculate existing employee compensation** or any of the **Synchronize** rules to ensure that merit is calculated correctly for part-time employees.

Table B-8 October 2022 Update

Artifact Type	Modified Artifacts	New Artifacts
Member Formulas	• OWP_Merit Adjustment % • OWP_Merit • OWP_Basic Salary • OWP_Skill Set_Reporting • OWP_Gender_Reporting • OWP_Age Band_Reporting • OWP_Highest Education Degree_Reporting (Property Dimension)	
Groovy Rules		• OWP_Copy Employee Master Data across Periodicities • OWP_CopyYearlyAndQtrly PlanDataToFirstPreiod

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Table B-8 (Cont.) October 2022 Update

Artifact Type	Modified Artifacts	New Artifacts
Templates	• OWP_Add Requisition_GT • OWP_Add Requisition_T • OWP_Assign Defaults_T • OWP_Incremental Process Data with Synchronize Defaults_GT • OWP_Incremental Process Data with Synchronize Definition_GT • OWP_Incremental Synchronize Defaults_GT • OWP_Incremental Synchronize Definition_GT • OWP_Process Loaded Data_T • OWP_Synchronize Defaults_T • OWP_Synchronize Definition_T • OWP_Associate Employee • OWP_Calculate Employee Compensation_Te • OWP_Calculate Job Compensation_T • OWP_Change Job • OWP_Enable Job_GT • OWP_Enable Job_T • OWP_Plan Departure_T • OWP_Transfer Heacount_T • OWP_Transfer In_T • OWP_Transfer Out_T • OWP_Transfer_T • OWP_Change Existing Details_T • OWP_Change Requisition_GT • OWP_Assign target Defaults	
Rules	• Incremental Process Data with Synchronize Defaults • Incremental Process Data with Synchronize Definition • Incremental Synchronize Defaults • Incremental Synchronize Definition	

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Table B-8 (Cont.) October 2022 Update

Artifact Type	Modified Artifacts	New Artifacts
Forms	• Employee Properties • Manage Existing Employees • New Hire - Request • Process Data and Synchronize Defaults • Process Data with Synchronize Defaults • Process Data and Synchronize Defaults_JO • Process Data and Synchronize Definition • Process Data with Synchronize Definition • Process Data and Synchronize Definition_JO • Synchronize Defaults • Synchronize Definition • Review Employee Information • Review Job Information	• Process New Hires • Employee Master Data • FTE Assignment Analysis
User Variables		• Period • Employee Parent
Data Load Templates	• EJ_EmployeePropertiesDataLoad_Actuals • EJ_EmployeePropertiesDataLoad_Plan • EO_EmployeePropertiesDataLoad_Actuals • EO_EmployeePropertiesDataLoad_Plan • JO_JobPropertiesDataLoad_Plan	
Accounts Enabled in the Reporting Cube	• Descendants of OWP_Total Headcount • IDescendants of OWP_Total FTE	
Data Maps	Headcount Data for Reporting	
Members		• OWP_End Date (Account dimension) • OEP_Home Entity (Entity dimension, when **Split-Funded FTE** is enabled)

April 2022 Update

The following information describes the modified artifacts related to the support of Essbase Hybrid Block Storage Option (BSO) cubes in Strategic Workforce Planning.

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Table B-9 April 2022 Update

Artifact Type	Modified Artifacts
Calculation Manager Templates	• OWP_Calculate Employee Compensation_TE • OWP_Calculate Supply • OWP_Remove Hiring Requisition_T • OWP_Rollup WFP Cube • OWP_Assign Defaults AGG_T • OWP_AGG_T • OWP_Assign Target Defaults • OWP_Calc_Acc_Periodicity • OWP_Calculate Demand
Members	• The storage option for OWP_New Employees in the Employee Dimension is changed to **Dynamic Calc**. • The storage option for OWP_Total Jobs in the Job dimension is changed to **Dynamic Calc**.

December 2021 Update

The following information describes new and modified artifacts related to the performance enhancements in the December 2021 update.

All Workforce and Strategic Workforce Planning rules and some member formulas have been updated with changes to enhance performance. There are no functional changes but the logic has been updated to leverage performance gains in the underlying technology. Any rule or member that is unmodified will automatically receive these performance enhancements. Any modified rule or member will remain as-is without these performance enhancements. Oracle recommends restoring these artifacts to their original state to uptake these performance enhancements and reapplying your modifications to the updated logic, if necessary.

Additionally, a new rule, **Calculate Employee Compensation for All Data** (or **Calculate Job Compensation for All Data** in a Job only model) allows administrators and power users to calculate compensation for all data within their scope.

> **Note**
>
> In Workforce, when Hybrid is enabled, because Employee and Job dimension are expected to be set with all parents aggregated dynamically, Workforce does not aggregate these dimensions. In earlier releases, Add Requisition was aggregated; starting with 21.12 it is no longer aggregated.

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Table B-10 December 2021 Update

Artifact Type	Modified Artifacts	New Artifacts
Calculation Manager Templates	• OWP_Calculate Employee Compensation_Te • OWP_Calculate Job Compensation_T • OWP_Process Loaded Data_T • OWP_Change Exsiting Details_T • OWP_Synchronize Defaults_T • OWP_Synchronize Definition_T • OWP_Assign Defaults_T • OWP_Transfer In_T • OWP_Transfer Out_T • OWP_Transfer_T • OWP_Incremental Process Data with Synchronize Definition_GT • OWP_Incremental Process Data with Synchronize Defaults_GT • OWP_Incremental Synchronize Defaults_GT • OWP_Incremental Synchronize Definition_GT • OWP_Plan Departure_T • OWP_Change Job • OWP_Assign Defaults AGG_T • OWP_Calculate Demand • OWP_Calculate Supply • OWP_Add Requisition_T • OWP_Change Requisition_T • "OWP_Change Existing Details_T" • "OWP_Plan Departure_T" • OWP_Enable Job_T • OWP_Transfer headcount_T	

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Table B-10 (Cont.) December 2021 Update

Artifact Type	Modified Artifacts	New Artifacts
Calculation Manager Rules	• OWP_Process Loaded Data • OWP_Calculate Existing Employee Compensation • OWP_Calculate New Hire Compensation • OWP_Calculate Job Compensation • OWP_Process Loaded Data • OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_Transfer In • OWP_Transfer Out • OWP_Transfer • OWP_Incremental Process Data with Synchronize Defaults • OWP_Incremental Process Data with Synchronize Definition • OWP_Incremental Synchronize Defaults • OWP_Incremental Synchronize Definition • OWP_Change Job • OWP_Process Loaded Strategic Workforce Data	• OWP_Calculate Employee Compensation for All Data • OWP_Calculate Job Compensation for All Data
Members	• OWP_CYTD(Prior) (in the Property dimension) • OWP_Tax1... Tax10 (in the Account dimension)	

Note

To further improve rules performance, you can modify all CYTD formulas in both Account and Property.
Take the year range of both the plan and forecast scenarios and update the formulas to work only for that year range. For example, if the Plan scenario year range is set to FY21 to FY24 and the Forecast scenario year range is set to FY22 to FY24, update the formulas accordingly with the year range from FY21 to FY24.

These modifications are needed only in applications where January is not the start month.

Replace "Apr" in these formulas with the last month of the application.

- **"OWP_CYTD Total Salary"** formula =

```
/* Plan and forecast year range sets from FY21 to FY24 */
IF(@ISMBR("OWP_Expense Amount"))
```


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```
  IF("Fiscal TP-Index"==1 and "Yr-Index"!=0)
    IF(@ISMBR("FY22"))
     "OWP_Total Salary" + "FY21"->"Apr"->"OWP_CYTD Total Salary"; /*Hardcoded prior
year and last month of the fiscal app*/
     ELSEIF(@ISMBR("FY23"))
     "OWP_Total Salary" + "FY22"->"Apr"->"OWP_CYTD Total Salary";
     ELSEIF(@ISMBR("FY24"))
     "OWP_Total Salary" + "FY23"->"Apr"->"OWP_CYTD Total Salary";
    ENDIF;
 ELSEIF("Cal TP-Index"==1)
    "OWP_Total Salary";
  ELSE
    "OWP_Total Salary" + @PRIOR("OWP_CYTD Total Salary");
  ENDIF;
ENDIF;
```

- **"OWP_CYTD Gross Earnings"** formula =

```
IF(@ISMBR("OWP_Expense Amount"))
  IF("Fiscal TP-Index"==1 and "Yr-Index"!=0)
    IF(@ISMBR("FY22"))
     " OWP_Total Compensation" + "FY21"->"Apr"->"OWP_CYTD Gross Earnings";
     ELSEIF(@ISMBR("FY23"))
     "OWP_Total Compensation" + "FY22"->"Apr"->"OWP_CYTD Gross Earnings";
     ELSEIF(@ISMBR("FY24"))
     "OWP_Total Compensation" + "FY23"->"Apr"->"OWP_CYTD Gross Earnings";
    ENDIF;
 ELSEIF("Cal TP-Index"==1)
    "OWP_Total Compensation";
  ELSE
    "OWP_Total Compensation" + @PRIOR("OWP_CYTD Gross Earnings");
  ENDIF;
ENDIF;
```

- **"OWP_CYTD Taxable Compensation"** formula =

```
IF(@ISMBR("OWP_Expense Amount"))
  IF("Fiscal TP-Index"==1 and "Yr-Index"!=0)
    IF(@ISMBR("FY22"))
     "OWP_Total Compensation" + "FY21"->"Apr"->"OWP_CYTD Taxable Compensation";
     ELSEIF(@ISMBR("FY23"))
     "OWP_Total Compensation" + "FY22"->"Apr"->"OWP_CYTD Taxable Compensation";
     ELSEIF(@ISMBR("FY24"))
     "OWP_Total Compensation" + "FY23"->"Apr"->"OWP_CYTD Taxable Compensation";
    ENDIF;
 ELSEIF("Cal TP-Index"==1)
    "OWP_Total Compensation";
  ELSE
    "OWP_Total Compensation" + @PRIOR("OWP_CYTD Taxable Compensation");
  ENDIF;
ENDIF;
```

- **"OWP_CYTD(Prior)" Formula** from property =

```
IF(@ismbr(@relative("OWP_Total Compensation",0)))
  IF("Fiscal TP-Index"=="Cal TP-Index" OR ("Fiscal TP-Index"!="Cal TP-Index" and
("OWP_Payment Terms"->"BegBalance"==[OWP_PaymentTerms.FiscalMonth] OR "OWP_Payment
Terms"->"BegBalance"==[OWP_PaymentTerms.FiscalQuarter] OR "OWP_Payment Terms"-
>"BegBalance"==[OWP_PaymentTerms.FiscalYear])))
  @SUMRANGE("OWP_Expense Amount", @REMOVE(@CURRMBRRANGE("Period", LEV,
0, ,-1),@LIST("OEP_Yearly Plan","Qtrly 1","Qtrly 2","Qtrly 3","Qtrly 4")));
 ELSE
  IF("Fiscal TP-Index"==1 and "Yr-Index"!=0)
  IF(@ISMBR("FY22"))
```


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```
     "FY21"->"Apr"->"OWP_Expense Amount"+"FY21"->"Apr"-
>"OWP_CYTD(Prior)"+"BegBalance"->"OWP_Expense Amount";
  ELSEIF(@ISMBR("FY23"))
     "FY22"->"Apr"->"OWP_Expense Amount"+"FY22"->"Apr"-
>"OWP_CYTD(Prior)"+"BegBalance"->"OWP_Expense Amount";
  ELSEIF(@ISMBR("FY24"))
     "FY23"->"Apr"->"OWP_Expense Amount"+"FY23"->"Apr"-
>"OWP_CYTD(Prior)"+"BegBalance"->"OWP_Expense Amount";

  ENDIF;
  ELSEIF("Cal TP-Index"==1 AND "OWP_Start Date"->"No Property" != #MISSING)
    #MISSING;
  ELSE
    @PRIOR("OWP_Expense Amount",1,@Relative("YearTotal",0)) +
@PRIOR("OWP_CYTD(Prior)",1,@Relative("YearTotal",0));
  ENDIF;
 ENDIF;
ENDIF;
```

August 2021 Update

The following information describes modified artifacts relating to Workforce enhancements in the 21.08 update, along with changes you must make in the application to use the new features.

Perform these tasks immediately after updating the Workforce **August 2021** content.

Adding Custom Dimensions to the Reporting Cube

In this update, for new applications, you have the option to choose whether to add custom dimensions to the reporting cube (OEP_REP) the first time you enable features.

For existing applications, you have a one-time option to add custom dimensions to the reporting cube the next time you enable features for either **Workforce** or **Strategic Workforce**. **Before you enable features**, you must clear data in the OEP_REP cube. Note that you can't disable Employee Demographics dimensions for an existing application.

To choose which dimensions are pushed to the reporting cube (OEP_REP), see Adding Custom Dimensions to the Reporting Cube:

- For new applications, you can perform this task only once, when you first enable features.
- For existing applications, you have a one-time option to perform this task the next time you make a change in **Enable Features** for either **Workforce** or **Strategic Workforce**.

Merit Assumptions

- Give users access to access to the new dashboard **Workforce and Merit Assumptions**.
- If you enabled **Merit Assumptions**, and you specify to plan at the **Global** level, the **Workforce and Merit Assumptions** dashboard uses **Company Assumptions**, and Entity is hidden. If you you specify to plan at the **Per Entity** level, the **Workforce and Merit Assumptions** dashboard uses Entity and **Company Assumptions** is hidden.
- For existing customers, if you enable **Merit Assumptions** and choose to plan by **Entity** or by **Global**, you must enter data for **Merit Rate**, **Merit Month**, and **Cut-off Date** at **Entity** or **Global** level. When you are loading data for existing employees using Data Management or Data Integration, these assumptions are copied to employees as part of the **Incremental Process Data with Synchronize** rule. Alternatvely, you can run **Process Loaded Data** whenever you update **Merit Month** or **Cut-off Date**.

Updated Employee Details Form

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There is a new member, **Merit Increase**, in the **Component** dimension, which is assigned as a Smart List value for **Merit Account**. For existing customers, after updating content for 21.08, in the **Employee Details** form, the row heading for **Merit** displays **1** instead of the new Smart List value. To update the **Employee Details** form to display the new member, **Merit Increase**, run either the **Calculate Compensation** or **Synchronize** rule.

Table B-11 August 2021 Update - Workforce and Strategic Workforce Planning New and Modified Artifacts

Artifact Type	Modified Artifacts	New Artifacts
Dashboards		**Workforce and Merit Assumptions** Make sure to give users access to access to the new dashboard **Workforce and Merit Assumptions**.
Forms	• Salary Grades • Merit Rates • Employee Properties—Merit Month row was removed • Process Data and Synchronize Defaults—Merit Month row was removed • Process Data and Synchronize Definition—Merit Month row was removed	Merit Assumptions
Templates	OWP_Calculate Demand is updated to correct the formula for the Previous Year's Ratio • OWP_Synchronize Definition_T • OWP_Synchronize Defaults_T • OWP_Assign Target Defaults • OWP_Assign Defaults_T • OWP_Remove Compensation Defaults • OWP_Add Salary Defaults • OWP_Add Tax Defaults • OWP_Add Earning Defaults • OWP_Add Benefit Defaults • OWP_Process Loaded Data_T • OWP_Transfer Out • OWP_Transfer_T • OWP_Change Job • OWP_Change Existing Details_T	• OWP_Copy Data across Entities_GT • OWP_Copy Data across Entities • OWP_Copy Data Across Entities For Grades_GT • OWP_Copy Data Across Entities For Grades

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Table B-11 (Cont.) August 2021 Update - Workforce and Strategic Workforce Planning New and Modified Artifacts

Artifact Type	Modified Artifacts	New Artifacts
Rules		• Calculate Demand for All Data • Calculate Supply for All Data
Accounts	• OWP_Merit—Added HSP_NOLINK,Hsp_Convert NonCurrencyValue UDA • OWP_Skill Set, OWP_Gender, OWP_Age Band, OWP_Highest Education Degree—Added Hsp_ConvertNonCurrency Value UDA • OWP_Merit Adjustment % Cum—Updated formula • OWP_Basic Salary—Updated member formula • OWP_Average Skill Assessment—Modified member formula for Account member	• OWP_Cut-Off Date—New member in Account dimension • OWP_Merit Increase—New member in Component dimension • OWP_No Grade—New member in Component dimension
Data Maps	Headcount and FTE Data for Reporting—Headcount Data for Reporting is renamed to Headcount and FTE Data for Reporting, and is updated to include the OWP_FTE account. (Renamed existing data map.)	
Data Load Templates	• EJ_SWPDemandDatabyJob_Plan • JO_SWPDemandDatabyJob_Plan	

November 2020 Update

The following information describes modified artifacts relating to Workforce currency conversion calculation for assumptions enhancements in the 20.11 update.

Beginning with the November 2020 release, as part of the Strategic Workforce Planning currency conversion calculation for assumptions enhancements, the following changes have been made.

With this update, added a new UDA `Hsp_ConvertNonCurrencyValue` to all earnings, benefits, taxes, and basic salary in the accounts dimension and to **No Property** from property dimension. With this currency conversion batch calculation copies assumptions (smart list values of earning, benefits, taxes, and basic salary) to reporting currency in the Workforce. This populates data across the components in the reporting cube after running the **Compensation Data for Reporting** datamap.

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> **Note**
>
> Generate new currency conversion script using **Currency Conversions** under **Create and Manage** to generate new updated script.

Table B-12 November 2020 Update - Workforce Modified Artifacts

Artifact Type	Modified Artifacts	New Artifacts
Account	• OWP_Earning1 • OWP_Earning2 • OWP_Earning3 • OWP_Earning4 • OWP_Earning5 • OWP_Earning6 • OWP_Earning7 • OWP_Earning8 • OWP_Earning9 • OWP_Earning10 • OWP_Benefit1 • OWP_Benefit2 • OWP_Benefit3 • OWP_Benefit4 • OWP_Benefit5 • OWP_Benefit6 • OWP_Benefit7 • OWP_Benefit8 • OWP_Benefit9 • OWP_Benefit10 • OWP_Tax1 • OWP_Tax2 • OWP_Tax3 • OWP_Tax4 • OWP_Tax5 • OWP_Tax6 • OWP_Tax7 • OWP_Tax8 • OWP_Tax9 • OWP_Tax10 • OWP_Basic Salary	
Property	No Property	

October 2020 Update

The following information describes modified artifacts relating to transfer enhancements in the 20.10 update.

Beginning with the October 2020 release, as part of the Strategic Workforce Planning transfer enhancements, the following changes have been made:

- With this update, you can now transfer an employee across custom dimensions and entities, in a one-step or two-step transfer. Previously, transfers were allowed for changing jobs and entities only. While transferring an employee from one entity to another entity, you

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can also select the same or different targets from the custom source. The same applies to transferring headcounts in Job Only models.

- In the source's transfer year, most of the employee properties, including FTE and Headcount, are cleared out starting in the transfer month. **Applicable Union Code**, **Employee Type**, **Pay Type**, and Status will remain but the Status will show as **Transfer Out**.
- If the employee transfer month is after the merit month in the year of transfer, merit rates are copied from the source. For subsequent years in the target entity, merit rates are calculated based on the target rates. When the employee is not active, the recommended merit rate is not populated. If the employee transfer month is before the merit month, merit rates are copied from the target.
- In the Job Only model, there is a restriction on the number of headcounts that can be transferred or departed based on the headcounts available on the job. This eliminates the need to run a calculate job compensation rule after departing headcounts from the job.
- Total FTE and Total Headcount are added to the New Hire request form, Employee Properties form, and Manage Existing Employee forms. Alias names for FTE and Headcount are modified to FTE Assumption and Headcount Assumption. FTE Assumption and Headcount Assumption are used for input assumptions to drive calculations. Total FTE and Total Headcount are used for reporting purposes.
- In the transfer year, earnings, benefits, and taxes paid in the source are considered while applying the target threshold. Computed expense in the source is copied to the transfer year's target as part of the transfer and change job process. After applying the entity defaults to the employee in target, the copied computed expense amount is considered while applying the threshold in the target in the transfer year for the earnings, benefits, and taxes that are the same across source and target. As part of the transfer headcount in Job Only model, computed expense in the source to target is based on the number of headcounts being transferred. This applies to a single-step and two-step transfer and change job actions on the employee in the Employee and Job model and Transfer Headcount action in Job Only model.

Table B-13 October 2020 Update - Workforce Modified Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Templates	• OWP_Transfer_T • OWP_Transfer Out_T • OWP_Transfer In_T • OWP_Change Job • OWP_Assign Target Defaults • OWP_Transfer Headcount_T • OWP_Synchronize Definition_T • OWP_Synchronize Defaults_T • OWP_Calculate Employee Compensation_Te • OWP_Plan Departure • OWP_Change Existing Details_T		

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Table B-13 (Cont.) October 2020 Update - Workforce Modified Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	• OWP_Transfer • OWP_Transfer Out • OWP_Transfer In • OWP_Change Job • OWP_Transfer Headcount		
Forms	• Manage Existing Employees • New Hire - Request • Employee Properties		
Account	• OWP_FTE • OWP_Headcount Alias name changed from FTE to FTE Assumption and HeadCount to HeadCount Assumption.		
Member Formula	Account Dimension members: • OWP_Earning1:OWP_Earning10 • OWP_Benefit1:OWP_Benefit10 • OWP_Tax1:OWP_Tax10 Property Dimension members: OWP_CYTD(Prior)		

June 2020 Update

The following information describes new and modified artifacts relating to different planning years for Plan and Forecast scenarios in the 20.06 update.

Beginning with the June 2020 release, Strategic Workforce Planning forms and rules have been updated to allow different planning years for the Plan and Forecast scenarios. Previously, the **Planning and Forecast Preparation** configuration task for Workforce and Strategic Workforce set the **&OEP_YearRange** and **&OWP_SWPYearRange** substitution variables, respectively, for both Plan and Forecast scenarios based on the year range set for the Plan scenario per respective module. References to these substitution variables are being discontinued.

With the June 2020 release, Oracle Strategic Workforce Planning Cloud has updated all business rules and templates to use methods that read the start year and end year from the **Planning and Forecast Preparation** configuration task separately for each scenario. Forms are modified to display data based on the start and end periods for the scenario using valid intersections. When the update is applied, if you haven't modified these forms and business rules:

- Predefined business rules and templates are updated.
- Predefined forms are updated.

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Because customized artifacts aren't updated during a new release, if you've customized forms or business rules, note the following.

- If you've modified rules that rely on the **&OEP_YearRange** or **&OWP_SWPYearRange** substitution variables, update the rules to use these functions (either in Business Rules or Groovy rules):
  - `[[PlanningFunctions.getModuleStartYear("Workforce","ScenarioName")]]`—Returns start year of given scenario
  - `[[PlanningFunctions.getModuleEndYear("Workforce","ScenarioName")]]`—Returns end year of given scenario
  - `[[PlanningFunctions.getModuleStartYear("Strategic Workforce","ScenarioName")]]`—Returns start year of given scenario
  - `[[PlanningFunctions.getModuleEndYear("Strategic Workforce","ScenarioName")]]`—Returns end year of given scenario

  > **Note**
  >
  > Module name and Scenario name must be enclosed in double quotation marks.

- If you've not modified the OWP_Process Loaded Data_T template but you have modified the OWP_Process Loaded Data rule, OWP_Incremental Process Data with Synchronize Defaults_GT template, or the OWP_Incremental Process Data with Synchronize Definition_GT template, which are dependent on OWP_Process Loaded Data_T, update these artifacts as follows since Design Time Prompt (DTP) values are now included to support different planning years for the Plan and Forecast scenarios:
  - OWP_Process Loaded Data rule must be updated to set the newly required DTP values at the rule level. To do so, open this rule in Calculation Manager, highlight the "OWP_Process Loaded_T" template object from within the rule (do not open the template itself), select the pencil icon to edit the DTP and update/enter the following information, then save and redeploy the rule.
    * `Set DTP Year Range = [[PlanningFunctions.getModuleStartYear("WORKFORCE",{Scenario})]]: [[PlanningFunctions.getModuleEndYear("WORKFORCE",{Scenario})]]`
    * `Set DTP MODULENAME = "Workforce"` (including the double quotes)
  - OWP_Incremental Process Data with Syncronize Defaults_GT and OWP_Incremental Process Data with Synchronize Definition_GT templates should be copied or downloaded locally. Restore these artifacts then re-apply your modifications, save, and redeploy these templates.
- Update custom forms for Workforce to use **ILvl0Descendants** of **"All Years"** instead of **&OEP_YearRange**.

  > **Note**
  >
  > Ensure the form properties to **Suppress Invalid Data for Rows** and **Suppress Invalid Data for Columns** are selected.

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Table B-14 June 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules (Workforce)	Updated rules, templates, and forms to allow different planning years for the Plan and Forecast scenarios: • OWP_Associate Employee • OWP_Change Job • OWP_Transfer In • OWP_Transfer Out • OWP_Transfer • OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_Process Loaded Data • OWP_Transfer Headcount • OWP_Calculate Existing Employee Compensation • OWP_Calculate New Hire Compensation	• OWP_Compensation Data for Reporting • OWP_Non Compensation Data for Reporting • OWP_Headcount Data for Reporting • OWP_Copy Working to Prior FCST Run OWP_Copy Working to Prior FCST rule before the current period is changed in the **Planning and Forecast Preparation** configuration task. This rule makes a backup of the current forecast scenario for all periods, copies data from "OEP_Working" version to "OEP_Prior FCST" version and from scenario Start Year to End Year.	NA
Calculation Manager Rules (Strategic Workforce Planning)	• OWP_Calculate Supply • OWP_Calculate Demand • OWP_Process Loaded Strategic Workforce Data	OWP_Copy Working to Prior FCST for Strategic Workforce Data Run this rule every time the forecast start period is changed. This rule makes a backup of the current forecast scenario for all periods, copies data from "OEP_Working" version to "OEP_Prior FCST" version and from scenario Start Year to End Year.	

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Table B-14 (Cont.) June 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Templates (Workforce)	Updated all templates to use methods that read the **Start Year** and **End Year**: • OWP_Add Requisition_GT • OWP_Change Requisition_GT • OWP_Change Existing Details_GT • OWP_Enable Job_GT • OWP_Change Salary_GT • OWP_Add Requisition_T • OWP_Change Existing Details_T • OWP_Associate Employee_T • OWP_Transfer • OWP_Plan Departure_T • OWP_Process Loaded Data_T • OWP_Transfer Headcount_T • OWP_Calculate Employee Compensation_Te • OWP_Incremental Process Data with Synchronize Defaults_GT • OWP_Incremental Process Data with Synchronize Definition_GT • OWP_Incremental Synchronize Defaults_GT • OWP_Incremental Synchronize Definition_GT	OWP_Set Valid Years for Scenario_T OWP_Synchronize Defaults_T OWP_Synchronize Definition_T OWP_AGG_T OWP_Assign Defaults_T OWP_Assign Defaults AGG_T OWP_Copy Working to Prior FCST_T **Note:** Run OWP_Copy Working to Prior FCST_T rule before the current period is changed. This rule makes a backup of current forecast scenario for all periods.	• OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_Assign Compensation_T
Calculation Manager Templates (Strategic Workforce Planning)	• OWP_Calculate Supply • OWP_Calculate Demand		

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Table B-14 (Cont.) June 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Forms (Workforce)	**Workforce Analysis** • Compensation Analysis • Detailed Compensation Analysis • Employee Assignments • FTE Requirement by Project • Merit Increase Analysis • Project Staffing Request - FTE • Regular FTE Vs Contractor • Review Employee Utilization • Review FTE Requirement across Projects • Review Headcount and FTE • Total Headcount and FTE	NA	NA
Forms (Strategic Workforce Planning)	**Workforce Dashboard Strategic** • Summary Age by Job • Average Skills • Behavorial Skills • Current Skills by Entity • Managerial Skills • Skills by Entity • Technical Skills **Workforce Plan Sheets Strategic** • Review Employee Information • Review Job Information • Employee Skill Details • Skill Assessment by Employee • Skills by Employees • Attrition Data by Age Band • Demand Driver Data without Scale • Demand Driver Data • Retirement Age	NA	NA

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Table B-14 (Cont.) June 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Forms (Workforce)	**Workforce Dashboard Compensation** • Budget by Compensation Category • FTE Trend • Headcount Trend • New Employee Expenses Trend • New Hire Trend • Total Employee Compensation • Total Existing Expenses Trend • Total Non Compensation Expenses by Job • Total Non Compensation Expenses	NA	NA

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Table B-14 (Cont.) June 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Forms (Workforce)	**Workforce - Plan Sheets - Compensation** • Employee Additional Earnings • Employee Benefits • Employee Properties • Employee Salary • Employee Taxes • Headcount Trends • Identify Invalid Data_JO • Identify Invalid Data • Job Properties • Manage Existing Employees • Manage Existing Jobs • New Hire Request • Process Data and Synchronize Defaults_JO • Process Data and Synchronize Defaults • Process Data and Synchronize Definition_JO • Process Data and Synchronize Definition • Reconcile Employee Transfer • Review Existing Employees by Job • Review Pending Transfer • Synchronize Defaults • Synchronize Definition	NA	NA
Forms (Workforce)	**Workforce Dashboard Demographics** • Workforce Expenses by AgeBand • Workforce Expenses by Gender • Worforce Expenses by Higher Education Level • Workforce Expenses by Skill Set	NA	NA

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Table B-14 (Cont.) June 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Forms (Workforce)	**Workforce Plan Sheets Administration** • Set Workforce Assumptions_JO • Set Workforce Assumptions • Standard Rate Assumptions	NA	NA
Forms (Workforce)	**Workforce Assumptions** • Merit Rates • Rate Table • Rate Table - Simple • Rate Table - Threshold • Salary Grades	NA	NA
Dimensions	Account	NA	NA
Member Formula	OWP_Basic Salary	NA	NA
Valid Intersections	• OWP_Scenario Years • OWP_Scenario Years_Reporting **Note:** Added Account dimension to valid intersections when both Workforce and Strategic Workforce are enabled.	OWP_SWP_Scenario Years OWP_SWP_Scenario Years_Reporting **Note:** These new valid intersections include the Account dimension when Workforce is also enabled.	NA

February 2020 Update

The following information describes new and modified artifacts relating to support for the new Start Date property in the 20.02 update.

Immediately after updating the Workforce **February 2020** content, you must run the new rule **1X Populate New Properties** to convert existing Start Month data to the Start Date account. Run this rule only once for each Scenario and Version combination with data, immediately after updating content. Specify only Scenario and Version combinations whose data you want to recalculate. For example, you may not want to recalculate historical data.

For optimum performance, before running **1xPopulate New Properties**, change the FIX Parallel dimension to use the dimension that is appropriate to parallelize the process by moving the dimension from FIX statement to FIX Parallel and move the entity member selection to FIX statement in the place of the dimension that's moved to FIX Parallel statement. This change needs to be made in **OWP_Populate New Properties_T** template in Calculation Manager. Save the changes and then deploy the **OWP_Populate New Properties** rule.

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> **Note**
>
> If you don’t run this rule immediately after updating, the consequence of running any rules is the possibility of losing some data. If you inadvertently run rules before running **1X Populate New Properties**, run **1X - Populate New Properties** and then rerun the rules that you previously ran.

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Table B-15 February 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager and Groovy Templates and Rules	All Calculation Manager and Groovy templates and rules in the Workforce OEP_WFP cube have been updated to accommodate **Start Date**. In Strategic Workforce Planning, **Calculate Demand** and **Calculate Supply** have not been modified. Tip: You can modify any obsolete rules that you are still using to take advantage of Start Date.	**1X Populate New Properties** **Note to updating customers:** Immediately after updating the February 2020 content, you must run the new rule **1X Populate New Properties** to convert existing Start Month data to the Start Date account. Run this rule only once for each Scenario and Version combination with data, immediately after updating content. Specify only Scenario and Version combinations whose data you want to recalculate. For example, you may not want to recalculate historical data. **NOTE**: If you don't run this rule immediately after updating, the consequence of running any rules is the possibility of losing some data. If you inadvertently run rules before running **1X Populate New Properties**, run **1X - Populate New Properties** and then rerun the rules that you previously ran. For optimum performance, before running **1x Populate New Properties**, change the FIX Parallel dimension to use the dimension that is appropriate to parallelize the process by moving the dimension from FIX statement to FIX Parallel and move the entity member selection to FIX statement in the place	NA

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Table B-15 (Cont.) February 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
		of the dimension that's moved to FIX Parallel statement. This change needs to be made in **OWP_Populate New Properties_T** template in Calculation Manager. Save the changes and then deploy the **OWP_Populate New Properties** rule.	
Account Members	NA	• OWP_Start Date • TP-EndDate • TP-Days	NA
Member Formulas	All member formulas that calculate salaries have been updated: • Accounts: – Basic Salary – Earning 1 through Earning 10 – Benefit 1 through Benefit 10 – Tax 1 through Tax 10 • CYTD (Prior)	NA	NA
Forms	Updated to include a **Start Date** column: • Employee Properties • Manage Existing Employees • New Hire - Request • Process Data and Synchronize Defaults • Process Data and Synchronize Definition • Job Properties • Manage Existing Jobs • Process Data and Synchronize Defaults_JO • Process Data and Synchronize Definition_JO	NA	NA

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Table B-15 (Cont.) February 2020 Update - Workforce Modified and New Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Data Load Templates	Updated to replace **Start Month** column with **Start Date**: • EJ_EmployeePropertiesDataLoad_Plan • EO_EmployeePropertiesDataLoad_Plan • JO_JobPropertiesDataLoad_Plan	NA	NA

June 2019 Update

The following information describes modified artifacts resulting from a fixed defect in the 19.06 update.

Table B-16 June 2019 Update - Workforce Modified Artifacts

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Templates	OWP_Assign Compensation Defaults	NA	NA
Groovy Templates	• OWP_Add Requisition_GT • OWP_Change Requisition_GT • OWP_Change Existing Details_GT	NA	NA

May 2019 Update

The following information describes new and modified artifacts related to the enhancements in the May 2019 update.

Immediately after updating the Workforce **May 2019** content, you must run the new rule **1X Copy Compensation Details from BegBalance to Periods**, which copies compensation details from the BegBalance member to all months. Run this rule only once for each active Scenario and Version combination with data, immediately after updating content. To run this rule, on the Home page, click **Rules**, then **All Cubes**, and then select OEP_WFSC from the **Cube** drop-down list. Then click **Launch** for the rule **Copy Compensation Details from BegBalance to Periods**.

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Table B-17 May 2019 Update - Workforce Enhancements

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	• Synchronize Defaults • Synchronize Definition • Process Loaded Data • Change Job • Transfer In • Transfer Out • Transfer • Associate Employee • Calculate Existing Employee Compensation • Calculate New Hire Compensation	Copy Compensation Details from BegBalance to Periods **Note to updating customers**: Run the rule 1 X Copy Compensation Details from BegBalance to Periods one time immediately after updating the May 2019 content to copy compensation details from BegBalance to all periods.	• Change Employee Status • Add Job
Calculation Manager Templates	• Synchronize Defaults • Synchronize Definition • Process Loaded Data_T • Change Job • Assign Compensation_T • Assign Target Defaults • Calculate Employee Compensation_Te • Transfer Out_T • Associate Employee	• Enable Job_T • Change Existing Details_T	• Change Requisition_T • Add Job_T • Change Employee Status_T • Assign Compensation Defaults
Groovy Rules	• Incremental Synchronize Defaults • Incremental Synchronize Definition • Incremental Process Data and Synchronize Definition • Incremental Process Data and Synchronize Defaults	NA	NA

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Table B-17 (Cont.) May 2019 Update - Workforce Enhancements

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Groovy Templates	• Add Requisition_GT • Change Requisition_GT • Incremental Synchronize Defaults_GT • Incremental Synchronize Definition_GT • Incremental Process Data and Synchronize Definition_GT • Incremental Process Data and Synchronize Defaults_GT	• Enable Job_GT • Change Salary_GT • Change Existing Details_GT	NA
Forms	• Employee Properties • Job Properties • Identify Invalid Data • Process Data and Synchronize Definition	NA	NA
Menus	Existing Actions	• Employee Actions • Job Actions	NA
Member Formulas	OWP_Basic Salary	NA	NA
Smart Lists	NA	Employee Options	NA

February 2019 Update

The following information describes new and modified artifacts related to the incremental data load functionality in the February 2019 update.

Workforce provides four forms for quickly updating and processing data on existing employees. Each form is associated with a Groovy rule that processes only the changed data. The forms are designed for optimal processing efficiency, depending on the kind of data being updated. You access these forms from the **Mass Update** tab. See Updating Employees and Jobs Details in the *Working with Planning Modules*.

On these forms, all the Flex dimensions and the Entity dimension are initially on the Page. Oracle recommends that you analyze the form load performance and then modify the layout of these forms, moving certain dimensions from the Page to the rows based on your requirements. Year and Period are also on the Page; Oracle assumes you'll use the selected Year and Period for loading and processing the changed data. Your Year and Period selection is equivalent to the runtime prompt values for the **Process Loaded Data** rule.

To provide processing efficiency for multiple simultaneous users, the default parallelism for the Groovy rule is set to 2. However, if you don't provide access to these forms for planners or if you expect a low level of concurrency, then you can adjust a design-time prompt (DTP) value

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to increase the parallelism to 4. Doing so will increase processing speed for large-scale changes in data.

Table B-18 February 2019 Update - Enhancements Related to Incremental Data Load

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	NA	NA	NA
Calculation Manager Templates	• OWP_Process Loaded Data_T • OWP_Synchronize Definition • OWP_Synchronize Defaults • OWP_Fix Parallel_T	NA	NA
Groovy Rules	NA	• OWP_Incremental Process Data with Synchronize Defaults • OWP_Incremental Process Data with Synchronize Definition • OWP_Incremental Synchronize Defaults • OWP_Incremental Synchronize Definition	NA
Groovy Templates	NA	• OWP_Incremental Process Data with Synchronize Defaults_GT • OWP_Incremental Process Data with Synchronize Definition_GT • OWP_Incremental Synchronize Defaults_GT • OWP_Incremental Synchronize Definition_GT	NA
Forms	NA	• Process Data and Synchronize Defaults • Process Data and Synchronize Definition • Synchronize Defaults • Synchronize Definition	NA
Vertical Tab	NA	Mass Update	NA

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Table B-18 (Cont.) February 2019 Update - Enhancements Related to Incremental Data Load

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Horizontal Tabs	NA	• Process Data and Synchronize Defaults • Process Updated Data • Synchronize Defaults • Synchronize Definitions	NA
Data Import Templates	• EJ_EmployeePropertiesDataLoad_Plan • EO_EmployeePropertiesDataLoad_Plan	NA	NA

November 2018 Update

The following information describes new and modified artifacts related to the performance enhancements in the Add Hiring Requisition rule in the November 2018 update.

Table B-19 November 2018 Update - Enhancements Related to Add Hiring Requisition Rule Performance

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	Add Requisition_GT	NA	NA
Calculation Manager Templates	• OWP_Add Requisition_T • OWP_Assign Compensation_T	NA	NA

September 2018 Update

The following information describes new and modified artifacts related to the performance enhancements in the September 2018 update.

Table B-20 September 2018 Update - Enhancements Related to Performance Improvements

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	• OWP_Process Loaded Data • OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_Plan Departure	NA	NA

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Table B-20 (Cont.) September 2018 Update - Enhancements Related to Performance Improvements

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Templates	• OWP_Process Loaded Data_T • OWP_Synchronize Definition • OWP_Synchronize Defaults • OWP_Add Requisition_T • OWP_Assign Compensation_T • OWP_Plan Departure_T	OWP_Fix Parallel_T	NA
Members	OWP_Utilization	NA	NA

July 2018 Update

The following information describes new and modified artifacts in the July 2018 update.

- Immediately after updating the Workforce **July 2018** content, you must run the new rule **One Time - Copy Rates to Months**, which copies rates from the BegBalance member to all months. Run this rule only once for each active Scenario and Version combination with data, immediately after updating content. To run this rule, on the Home page, click **Rules**, then **All Cubes**, and then select OEP_WFSC from the **Cube** drop-down list. Then click **Launch** for the rule **One Time - Copy Rates to Months**.
- For components configured with the **Payment Frequency** set to **One-time Pay**: Unless you select a **One-time Pay Option**, your component expenses continue to occur in the first month of your selected payment frequency.

Table B-21 July 2018 - Enhancements Related to Add Requisition

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	NA	• OWP_Add Requisition_GT • OWP_Change Requisition_GT	• OWP_Add TBH • OWP_ChangeHiringRequisitionStatus
Calculation Manager Templates	NA	• OWP_Add Requisition_T • OWP_Assign Compensation_T • OWP_Change Requisition_T	• OWP_Add TBH_T • OWP_ChangeHiringRequisitionStatus_T
Smart Lists	OWP_Status	• OWP_Salary Options • OWP_Requisition Options	NA
Menus	• New Hire Actions Menu Item-Add Hiring Requisition • Change Requisition Status	NA	NA

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July 2018 Update - Enhancements Related to Benefits and Tax Wizard Calculations

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Calculation Manager Rules	• OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_ Process Loaded Data • OWP_Transfer • OWP_Transfer In • OWP_Change Job • OWP_Associate Employee	• OWP_Copy Rates Across Entities • OWP_Copy Rates to Months • OWP_Copy Rates from Periodicities • OWP_Copy Rates Across Years	NA
Calculation Manager Templates	• OWP_Synchronize Defaults • OWP_Synchronize Definition • OWP_ Assign Compensation Defaults • OWP_ Assign Target Defaults	• OWP_Copy Rates Across Entities • OWP_Copy Rates to Months • OWP_Copy Rates from Periodicities • OWP_Copy Rates Across Years • OWP_Check Rates Availability at Months_T	NA
Members	• All ten base accounts under each parent: OWP_Total Earnings, OWP_Total Benefits, and OWP_Total Taxes • Provided children of OWP_Tiers and OWP_Options in the OEP_WFSC cube are now set to a Time Balance Property of Balance. The Time Balance property of custom members added under parent members OWP_Options and OWP_tiers should also be changed to Balance.	In the Property dimension: • OWP_Custom Expense • OWP_One Time Pay	NA
Smart Lists	OWP_Payment Frequency	• OWP_Component Type • OWP_One Time Pay	NA

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Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
Forms	• Rate Table • Rate Table - Simple • Rate Table - Threshold	NA	NA
Menus	NA	OWP_Copy Rates	NA
Data Load Templates	• EJ_Earnings,Benefits and Taxes-Properties • EO_Earnings,Benefits and Taxes-Properties • JO_Earnings,Benefits and Taxes-Properties • EJ_Earnings,Benefits and Taxes -Rates • EO_Earnings,Benefits and Taxes - Rates • JO_Earnings,Benefits and Taxes -Rates	NA	NA

Updating All Planning Modules

September 2023

Beginning with 23.09, you can now manage alias tables for Planning Modules. See Managing Alias Tables for details on this enhancement.

If you are importing a snapshot to 23.09 (or later) from a release earlier than 23.08, alias tables are created but they might be empty. To resolve this issue, use the **Manage Seeded Alias Tables** option to add aliases for the languages you want.

As part of this enhancement, aliases for some members for certain languages have been added. If a module is updated in the future, these aliases will be loaded. If you have any custom members with the same alias, this can cause a cube refresh error. Review the list of new aliases and make any changes as needed to your custom members.

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New Aliases in 23.09

Table B-22 Financials, Workforce, Capital, and Projects with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Account	• OFS_Other Cash (3 shared members) • OPF_% Complete • OPF_Accrued Revenue • OPF_Capitalizable (3 shared members) • OPF_Cost Plus Revenue Assumptions • OPF_Custom Direct Input Assumptions • OPF_Equipment Description • OPF_Financial Performance Measures • OPF_KPIs • OPF_Obligation Details • OPF_Performance Metrics • OPF_Project Detail Information • OPF_Project Read Only Properties • OPF_Required Equipment Assumptions • OPF_Revenue Recognition % • OPF_Total Expenses - Store • OPF_When Period • OPF_When Year • OWP_Cut-off Date • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FTE Variance • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (2 shared members) • OWP_Start Date (2 shared members) • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC
Jobs	OWP_All Jobs
Period	Project Financial Mapping
Version	OEP_Target
Resource Class	OPF_Load
Age Band	• No Age Band • OWP_Total Age Band
Gender	• No Gender • OWP_Total Gender
Highest Education Degree	• No Highest Education Degree • OWP_Total Highest Education Degree
Skill Set	• No Skill Set • OWP_Total Skill Set
Union Code	• No Union Code • OWP_All Union Code • OWP_Total Union Code

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Table B-23 Financials, Workforce, Capital, and Projects with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Account	• OCX_Impairment Value Assumptions • OFS_Other Cash (3 shared members) • OPF_% Complete • OPF_Accrued Revenue • OPF_Capital Integration Properties • OPF_Capitalizable (3 shared members) • OPF_Cost Plus Revenue Assumptions • OPF_Custom Direct Input Assumptions • OPF_Equipment Description • OPF_Financial Performance Measures • OPF_Indirect Integration Properties • OPF_Integration Properties • OPF_Integration Status Description (2 shared members) • OPF_KPIs • OPF_Obligation Details • OPF_Performance Metrics • OPF_Project Detail Information • OPF_Project Integration Status (2 shared members) • OPF_Project Read Only Properties • OPF_Project Template - Capital (3 shared members) • OPF_Project Template - Indirect (3 shared members) • OPF_Recognized Revenue • OPF_Reporting Properties • OPF_Revenue Recognition % • OPF_Standard Integration Properties • OPF_Total Expenses - Store • OPF_When Period • OPF_When Year • OWP_Cut-off Date • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FTE Variance • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (2 shared members) • OWP_Start Date (2 shared members) • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC • OPF_Project Description
Component	• OWP_Merit Increase • OWP_No Grade
Employee	OWP_New Employees
Entity	OEP_Home Entity

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Table B-23 (Cont.) Financials, Workforce, Capital, and Projects with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Period	Project Financial Mapping
Version	OEP_Target
Resource Class	• OPF_Adjustment (+/-) • OPF_Load
Age Band	• No Age Band • OWP_Total Age Band
Gender	• No Gender • OWP_Total Gender
Highest Education Degree	• No Highest Education Degree • OWP_Total Highest Education Degree
Skill Set	• No Skill Set • OWP_Total Skill Set
Union Code	• No Union Code • OWP_All Union Code • OWP_Total Union Code

Table B-24 Strategic Workforce Planning with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Account	• OWP_Average Compensation Rates • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (3 Shared members) • OWP_Start Date (3 shared members) • OWP_Strategic Headcount Planning Accounts for Forms • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC
Age Band	No Age Band
Component	• OWP_Attrition Drivers • OWP_Merit Increase • OWP_No Grade
Employee	OWP_New Employees
Entity	OEP_Home Entity
Period	• BegBalance • No Period • OEP_Yearly Plan
Version	OEP_Target

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Table B-25 Strategic Workforce Planning with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Account	• OWP_Average Compensation Rates • OWP_Cut-off Date • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_FTE Variance • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (3 Shared members) • OWP_Start Date (3 shared members) • OWP_Strategic Headcount Planning Accounts for Forms • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC
Age Band	No Age Band
Component	• OWP_Attrition Drivers • OWP_Merit Increase • OWP_No Grade
Employee	OWP_New Employees
Entity	OEP_Home Entity
Period	• BegBalance • No Period • OEP_Yearly Plan
Version	OEP_Target

Table B-26 Sales Planning Quota Planning Module with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Measure	OQP_Unit of Measures
Period	• No Period • OEP_Qrtly Plan • OEP_Weekly Plan
Product	No Product
Scenario	OEP_Rolling Forecast
Territory	OEP_Unspecified Territory
Version	OEP_Working Bottom Up
Years	No Year

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Table B-26 (Cont.) Sales Planning Quota Planning Module with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Plan Element	• OGS_Total Plan • OGS_Total Line Items • OGS_Base Forecast • OGS_Adjustment (+/-) • Line 2 • Line 3 • Line 4
View	• Periodic • YTD

Table B-27 Sales Planning Quota Planning Module with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Measure	OQP_Unit of Measures
Period	• No Period • OEP_W1 to OEP_W52 • OEP_Weekly Plan
Product	No Product
Scenario	OEP_Scenarios
Territory	OEP_Unspecified Territory
Years	No Year

Reviewing Modified Artifacts

You can check which original application artifacts, such as forms and menus, have been modified.

To review the artifacts in your application:

1. Click **Application** , then **Configure**, and then select Financials, Workforce, Projects, or Capital.
2. From the **Actions** menu, select **Review Modified Artifacts**.
3. Click **Filter** to select an artifact type, and then click **Apply**.

   The artifacts that have been modified are listed.

Reversing Customizations

To undo customizations to predefined artifacts:

1. From the Home page, click **Application** , then **Configure**, and then select a module.

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2. From the **Actions** menu, select **Review Modified Artifacts**. Click **Filter** to select different artifact types.
3. Select the artifacts, and then click **Restore**.

Table B-28 Video

Your Goal	Watch This Video
Learn about restoring artifacts to their predefined state.	Restoring Artifacts in Oracle Enterprise Planning Cloud

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C

Strategic Workforce Planning Best Practices

Use these best practices for Strategic Workforce Planning.

This table provides links to the best practices mentioned in this guide.

Table C-1 Strategic Workforce Planning Best Practices

Best Practice For	See this Section
Creating and running an EPM Center of Excellence	Creating and Running an EPM Center of Excellence
Performance considerations for rules	Performance Considerations for Strategic Workforce Planning Rules
Best practices for rules	Strategic Workforce Planning Rules

In addition, review the best practices for Planning in Planning Best Practices in *Administering Planning*.

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