Oracle Fusion Cloud Human Resources

Implementing and Administering Workforce Scheduling

24C

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Author: Lynn Raiser

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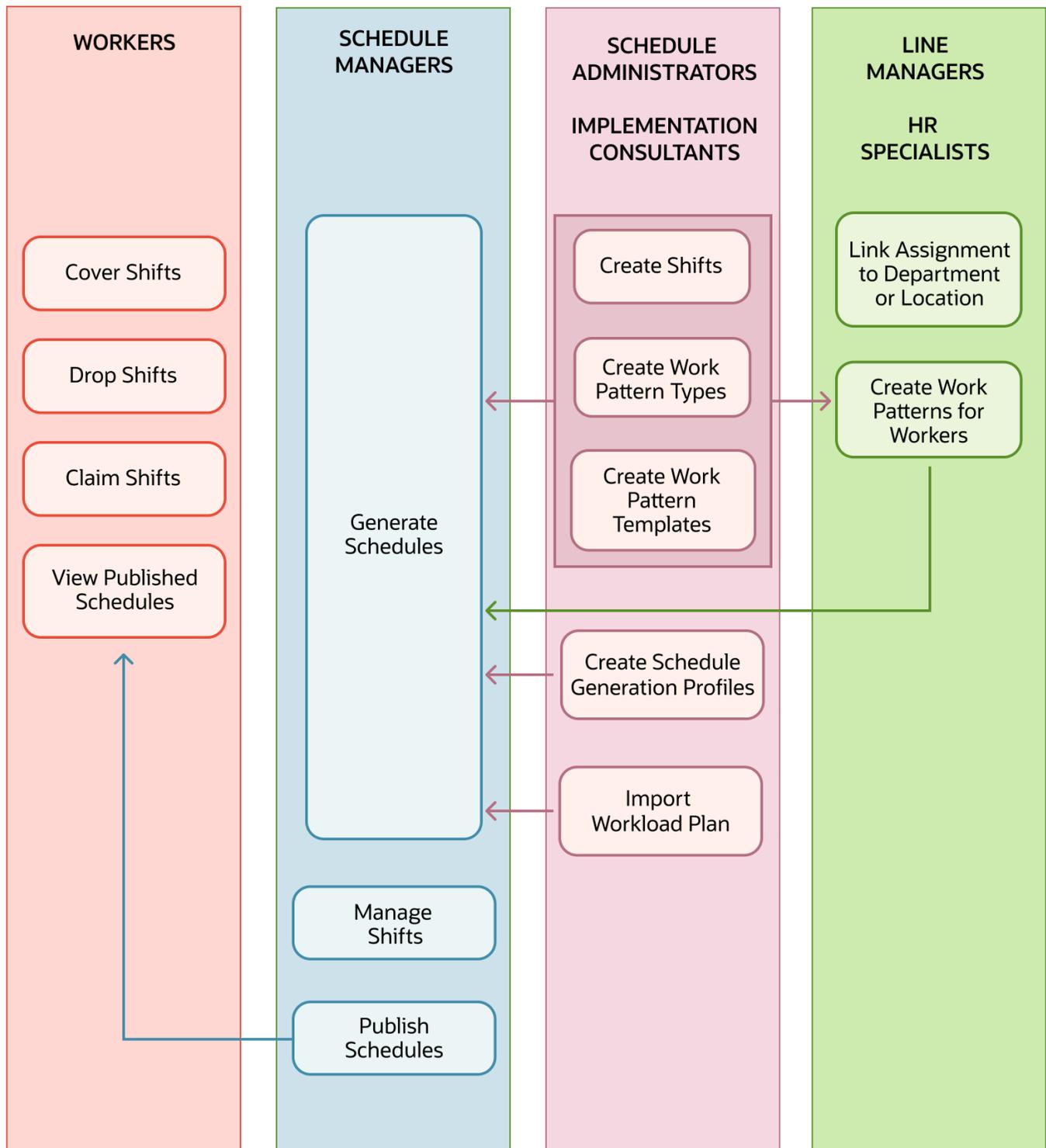
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1 Overview

Overview of Workforce Scheduling

Schedule the appropriate quantity of qualified workers where you need them.

- Implementation consultants and schedule administrators can create a library of shifts, work pattern types, and work pattern templates. They can also create rules to assign the work pattern templates as work patterns to worker assignments. They create schedule generation profiles that link schedule managers to staffing departments and schedule periods. And they can import workload plans.

- Line managers link worker assignments to departments or locations so that they can be assigned work patterns and schedule managers can generate appropriate workforce schedules. The line managers can also manually add work patterns to worker assignments.

- Schedule managers generate and publish workforce schedules, and manage schedule shifts to optimize worker resources.

- Workers can use their calendars to view their published schedules, claim open shifts, and submit requests to cover, and drop shifts.

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WORKERS	SCHEDULE MANAGERS	SCHEDULE ADMINISTRATORS IMPLEMENTATION CONSULTANTS	LINE MANAGERS HR SPECIALISTS
Cover Shifts		Create Shifts	Link Assignment to Department or Location
Drop Shifts	Generate Schedules	Create Work Pattern Types	Create Work Patterns for Workers
Claim Shifts		Create Work Pattern Templates	
View Published Schedules		Create Schedule Generation Profiles	
		Import Workload Plan	
	Manage Shifts		
	Publish Schedules		

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Here's the workforce scheduling cycle:

1. Import your workload.
2. Generate draft and planned schedules.
3. Self-schedule shifts.
4. Balance the schedules.
5. Create more shift opportunities.
6. Publish the final schedules.
7. Fill opportunities and shift swaps.
8. Approve or deny submitted shift requests, such as cover, drop, and withdraw claim.

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Approve or
Deny Requests

1 Import
Workload

Generate Draft
and Planned
Schedule

Self-Schedule
Shifts

Balance
Schedule

Create More
Opportunities

Publish
Final Schedule

Fill Opportunities
and Fill Swaps

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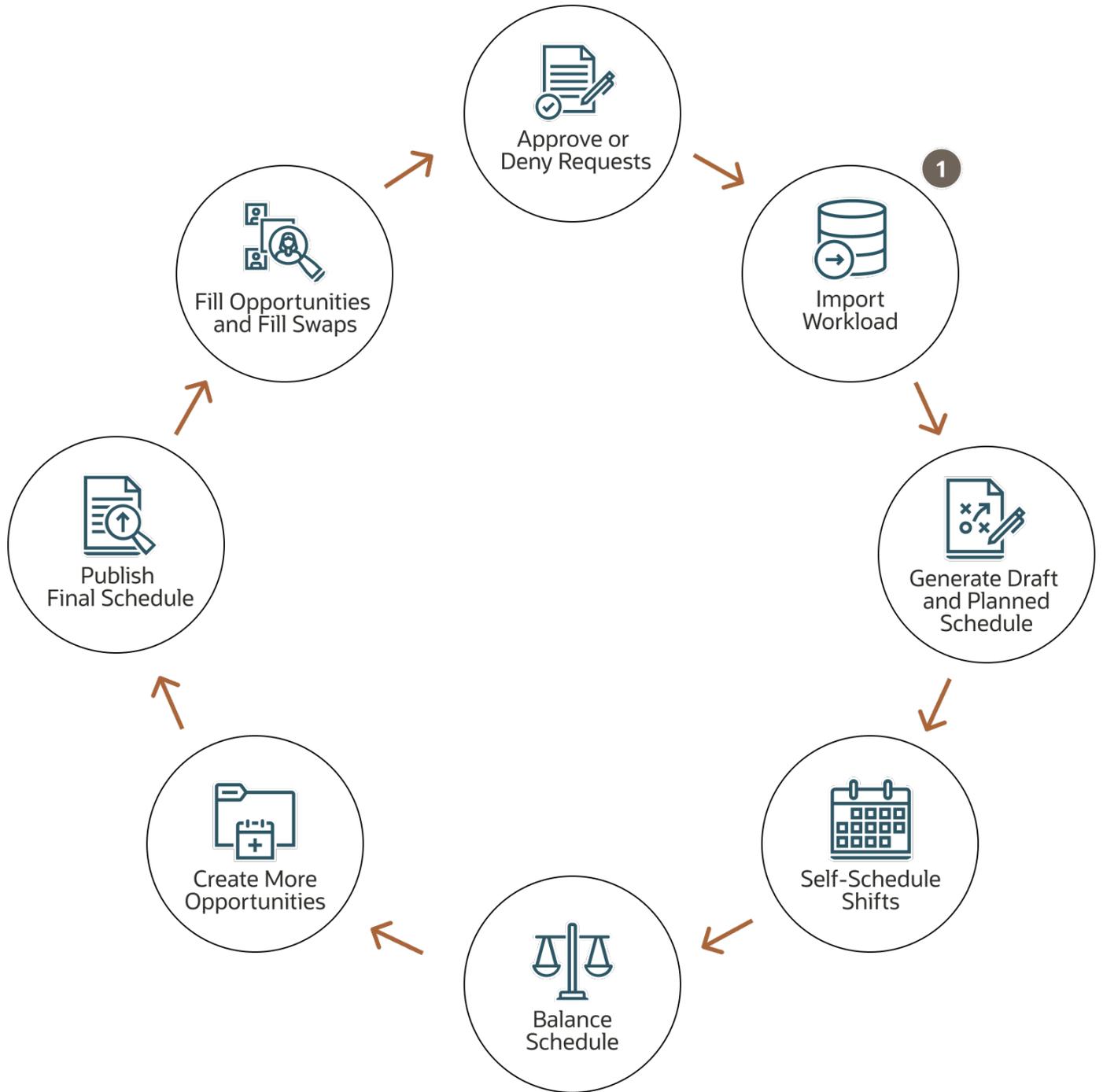
Workforce Scheduling Setup and Maintenance Tasks

You can address simple to complex scheduling methods with your workforce scheduling configurations. Configure Workforce Scheduling to support your policies by completing these tasks in the order listed.

Here's how to find tasks in the Setup and Maintenance work area:

1. On the Tasks panel tab, click Search.
2. On the Search page, search for and select the task.

Tasks specific to Workforce Scheduling are in the Workforce Deployment offering, Workforce Scheduling functional area.

Task or Quick Action	Description	Recommended Help
Manage Extended Lookup Codes Location: Setup and Maintenance work area	Optionally add codes, such as On-Call, Regular, Trainee to the Workforce Schedule Shift Types extended lookup and edit existing extended names because they're the values people see on various shift and scheduling pages. Be very careful to not delete any shifts types that have been used. It'll affect editing and coverage calculations in unpredictable ways	*Shift Types, Codes, and Categories in Workforce Scheduling*
Manage Common Lookups Location: Setup and Maintenance work area	Optionally add shift categories, such as Day, Evening, and Night, to the ORA_HTS_ENT_ SHIFTS_CATEGORY lookup type. These categories let schedule managers filter the shifts library to quickly find relevant shifts. Also optionally add shift change reasons in the ORA_HTS_SHIFT_CHANGE_REASON lookup type. You can also edit the lookup code meanings.	*Shift Types, Codes, and Categories in Workforce Scheduling*
Transaction Console Location: **Navigator** > **Tools**	Optionally, configure atomic bypass approvals for Approve Shift Drop transaction rules. By default, approval is enabled for only regular drop shift requests. On-call shift drop shift requests don't require approval.	*Oracle HCM Cloud Common Features Release 13 Transaction Console (Doc ID 2430452.1)* on My Oracle Support
Manage Task Configurations for Human Capital Management Location: Setup and Maintenance work area	Optionally configure expiration and escalation policies for the DropShiftApprovalTask and OfferShiftApprovalTask tasks on the Deadlines tab.	*Define the Due Date and Expiration Policies for Workflow Tasks*
Shifts Locations: Setup and Maintenance work area using the Enterprise Shifts task and **My Client Groups** > **Workforce Scheduling**	Define the work duration and start time, and optionally include a total break duration to identify the total shift duration. You use these shifts to create work patterns templates and work patterns. You also use them to identify operating shifts for schedule generation profiles, and when managing workforce schedules.	*Shifts in Workforce Scheduling*

Task or Quick Action	Description	Recommended Help
Work Pattern Types Location: Setup and Maintenance work area	Define work periods using duration, start and end times, flexible days, and flexible days and times. You use these types to create work pattern templates and work patterns.	*Work Pattern Types in Workforce Scheduling*
Work Pattern Templates Locations: Setup and Maintenance work and **My Client Groups** > **Workforce Scheduling**	Optionally identify the shifts framework for groups of workers during a specific cycle, create work pattern templates. The shifts can have specific start and end times or durations for specific days. Or they can be flexible. This framework is used to decide the workers' default contractual schedules.	*Work Pattern Templates in Workforce Scheduling*
Work Patterns Location: **My Client Groups** > **Workforce Scheduling**	Identify the shifts framework for a worker during a specific cycle, create work pattern templates. The shifts can have specific start and end times or durations for specific days. Or they can be flexible. This framework is used to decide the worker's default contractual schedules.	*Work Patterns in Workforce Scheduling*
Schedule Generation Profiles Locations: Setup and Maintenance work area using the Workforce Schedule Generation Profiles task and **My Client Groups** > **Workforce Scheduling**	Define schedule generation profiles that identify the staffing departments and policies governing specific scheduling processes. Schedule managers then use their profiles to generate the workforce schedule for their workers according to their work patterns.	*Schedule Generation Profiles for Workforce Scheduling*
HCM Data Loader Location: **My Client Groups** > **Data Exchange**	Import workload requirement data that provides the demand requirement for Workforce Scheduling. You can import data over any date range and times within those ranges to establish a daily workload requirement to use as a goal for scheduling activities.	*Guidelines for Loading Workload Plans for Workforce Scheduling*
Alerts Composer Location: **Navigator** > **Tools**	Configure self-scheduling alert notifications that keep workers and schedule managers informed about the self-scheduling process. Also configure the schedule generation alerts about, for example, generated schedules and finalize schedule reminders.	*Overview of Workforce Self-Scheduling*

Note: These tasks are also available as part of Oracle Fusion Cloud Human Resources:

- Shifts

- Work Pattern Types

- Work Pattern Templates

- Work Patterns

And you can set up work and manager notifications about new, updated, and deleted work patterns.

Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- *Securing HCM*
- *Security Reference for HCM*

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2 Approval Configurations

Align Approval Workflows for Drop, Cover, and Swap Shift Requests with Organizational Policies

Align Approve Shift Cover, Approve Shift Drop, and Approve Shift Swap processes with your organization's policies. Use Transaction Console to review, configure, and test the rules.

Here's the available payload attributes you can use when configuring rules:

- Allow Overtime
- Department
- Incentive Amount
- Job
- Job Family
- Location
- Position
- Premium Shift
- Scheduling Group
- Shift Category
- Shift Type
- Line Manager Hierarchy
- WFM System Administrator
- Schedule Managers

Configure an Expiration Policy for Swap Shift Approvals

To make sure that swap shift approvals are completed within a certain period, you can configure an expiration policy. By default, managers with area of responsibility for the department associated with the requested shift swap get the approval notifications.

1. In the Setup and Maintenance work area, search for and select the **Manage Task Configurations for Human Capital Management** task.
2. In BPM Worklist, on the Task Configuration tab, search for and select **SwapShiftApprovalTask**.
3. On the Tasks to be configured toolbar, click the **Edit** task icon.
4. On the Deadlines subtab, set a due date, if needed.
5. Set the expiration policy.
   a. Expand the Expiration Settings section.

       b. To ensure that all approvals are completed within a certain period, select **Task Level**.

       c. Enter a duration.

       d. Leave the **Expire only** option selected.

       e. Optionally select the **Exclude Saturday and Sunday** checkbox.

6. On the Tasks to be configured toolbar, click the **Commit** task icon.

3 Shifts, Work Pattern Types, Work Patterns, and Notifications

Shift Types, Codes, and Categories in Workforce Scheduling

Ensure the accuracy of your workforce schedules by defining and managing shift types for your workloads and shifts, such as On-Call and Regular. And use premium shift codes to further qualify the shift type.

Also let schedulers easily to find relevant shifts using shift categories, such as Day, Evening, and Night.

Shift types can be on-call or work, and work shift types also have productivity percentages.

- HCM integration specialists can import workload with shift types.
- Schedulers can generate schedules based on shift type, for example, generating on-call schedules that have only shifts with the On-Call shift type. Schedulers can also see and edit the shift type.

Coverage variances on various workforce scheduling pages account for the scheduled productivity set with the work shift types.

Add shift types using the Manage Extended Lookup Codes task in the Setup and Maintenance work area. The extended names are what people see on the various shift and scheduling pages.

You can further qualify shift types with premium shift codes. Add your codes to the ORA_HWM_PREMIUM_SHIFT_CODE lookup type and the Manage Common Lookups task in the Setup and Maintenance work area. Add shift categories in the ORA_HTS_SHIFT_CATEGORY lookup type.

Shifts in Workforce Scheduling

A shift is a defined block of work used to create work patterns. You also use them to identify operating shifts for schedule generation profiles, and when managing workforce schedules.

A shift includes a name, work duration, and start time. It can include a total break duration. The work and break durations decide the total duration. For example, you create the Union Day shift with these settings:

- The start time is 8:00 am.
- The work duration is 8 hours.
- The total break duration is 60 minutes.
- The calculated total duration is 9 hours.

Work patterns that use this shift could include two 15-minute paid coffee breaks and one 30-minute unpaid meal break.

CAUTION: Be sure to enter times and durations that are in 15-minute intervals, such as 15, 30, and 45.

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When appropriate you can let workers exceed their FTE without any validation warnings for the worker or scheduler by configuring shifts that allow overtime. Exceeding FTE without validation warnings happens when workers accept open shifts or requests to cover shifts that allow overtime. It also applies when they claim shifts that allow overtime during self-scheduling.

You can encourage workers to work certain shifts by including an incentive amount when configuring or assigning the shift.

To help people more quickly find appropriate shifts, shifts can include a category, such as Day, Evening, or Night. Manage the Category drop-down list using the Manage Common Lookups task and the ORA_HTS_ENT_SHIFTS_CATEGORY lookup type.

Create shifts using the Shifts quick action for **My Client Groups** > **Workforce Scheduling**. You can also use the Enterprise Shifts task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

> **Tip:** Any reports that you create that include shift start times, end times, and work durations will show the values in only minutes because that's how they're stored. Only the applicable pages include calculations to convert stored minutes over 59 into hours and minutes.

Work Pattern Types in Workforce Scheduling

You can use duration, start and end times, flexible days, and flexible days and times work pattern types to identify the shift period type to use in work patterns.

- Duration: These patterns define the work period using a duration, such as 8 hours on fixed workdays.
- Start and end times: These patterns define the work period using start and end times, such as 8:00 am and 5:00 pm on fixed workdays.
- Flexible days: These patterns define the work period using start and end times, such as 8:00 am and 5:00 pm and support flexible working days.
- Flexible days and times: These patterns define the work period using a duration, such as a maximum daily duration of 8 hours, and support flexible working days.

Flexible working days are the days when the worker needs to be available to work. To derive time totals and absence information, you need to use duration and start and end time shifts and work patterns. That information can't be derived from flexible shifts and patterns.

Work pattern types also identify the type and nature of any included breaks. For example, breaks can occur at a fixed time, any time during a specified range, or any time during the shift. And they can be paid or unpaid.

> **CAUTION:** Be sure to break durations are in 15-minute intervals, such as 15, 30, 45, or 60 minutes.

You create work pattern types using the Work Pattern Type task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

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Work Pattern Templates in Workforce Scheduling

To identify the shifts framework for groups of workers during a specific cycle, create work pattern templates. The shifts can have specific start and end times or durations for specific days. Or they can be flexible.

For multiweek templates, you can also set a shift to be a nonworking week. This framework is used to decide the workers' default contractual schedules.

You can use work pattern templates to create work patterns for individual users, or assign them to workers who meet specific criteria. Create work pattern templates using the Work Pattern Templates quick action for **My Client Groups** > **Workforce Scheduling**. You can also use the Work Pattern Templates task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

Related Topics
- Work Patterns in Workforce Scheduling

Work Patterns in Workforce Scheduling

To identify the shifts framework for a worker during a specific cycle, create a work pattern for their work assignment. The shifts can have specific start and end times or durations for specific days. Or they can be flexible.

For multiweek patterns, you can also set a shift to be a nonworking week. This framework is used to decide the worker's default contractual schedule.

Here's an example of a work pattern for Kris's Shelf Stocking assignment. The pattern is for a 2-week cycle and has shifts with start and end times.

- For week 1, Kris works Monday, Wednesday, and Friday from 8:00 am to noon and Tuesday, Thursday, and Saturday from noon to 4:00 pm. All the shifts include a 15-minute paid break that Kris can take any time during the shift.

- For week 2, Kris works from 2:00 pm to 8:00 pm. Tuesday, Wednesday, and Thursday. Kris also gets a 15-minute paid coffee break at 4:00 pm. and a 30-minute unpaid meal break at 6:00 pm.

Here's an example for the same assignment and cycle, but with shifts that have flexible days and times.

- For week 1, Kris can work Monday, Wednesday, and Friday for a maximum of 4 hours. Kris can also work Tuesday, Thursday, and Saturday for a maximum of 6 hours. All the shifts include a 15-minute paid break that Kris can take any time during the shift.

- For week 2, Kris can work on Tuesday, Wednesday, and Thursday for a maximum of 6 hours. Kris can take a 15-minute paid coffee break between noon and 3:00 pm and a 30-minute unpaid meal break between 5:00 pm and 7:00 pm.

Nonflexible work patterns are validated to ensure the weekly hours total to the standard working hours defined for the worker assignment. For example, if a worker has an assignment-level FTE of 40 hours, then their work pattern needs to total to 40 hours for any week. Flexible work patterns aren't validated.

To create a work pattern, use the Work Patterns quick action for **My Client Groups** > **Workforce Scheduling**. On the Work Patterns page, search for and select a specific work assignment to see the existing inactive and active work

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patterns. You can also add other work patterns here. Or you can load work patterns for worker assignments using HCM Data Loader.

Tips

As a line manager or HR specialist, you can assign work patterns to only the workers you've permissions to access.

A worker's work assignment can have only one work pattern active at a time and work pattern dates can't overlap. The work assignment can have gaps between when one work pattern ends and another pattern starts.

The fields that you see when adding shifts depend on the selected work pattern type. For example, start and end times types include time fields while duration types don't. You can add existing shifts to the work pattern or create the appropriate shift while you're creating the work pattern.

For flexible work patterns, the days or days and times are when the person needs to be available to work that assignment. You don't need to schedule them to work on all the specified days and at all the specified times. For example, Kris's manager schedules Kris to work the week 1 pattern on Mondays and Fridays from 9:00 am to noon. They don't schedule Kris to work at all on Wednesdays.

Notify Workers and Managers About New, Updated, and Deleted Work Patterns

Workforce scheduling provides three alerts that you can configure using the Alerts Composer tool. By default, they notify a worker when they've a new, update, or deleted work pattern. You can change them to also notify the worker's manager.

Alert Template	Description
HTS Work Pattern Created	Notification to worker that they've a new work pattern assigned.
HTS Work Pattern Updated	Notification to worker that their work pattern was updated.
HTS Work Pattern Deleted	Notification to worker that their work pattern was deleted.

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4 Schedule Generation and Management

Schedule Generation Profiles for Workforce Scheduling

As a schedule administrator, you can define schedule generation profiles that identify the staffing departments and policies governing specific scheduling processes. You can also set scheduling rules to make sure schedules comply with policies and regulations.

Schedule managers then use their profiles to generate the workforce schedule for their workers according to their work patterns.
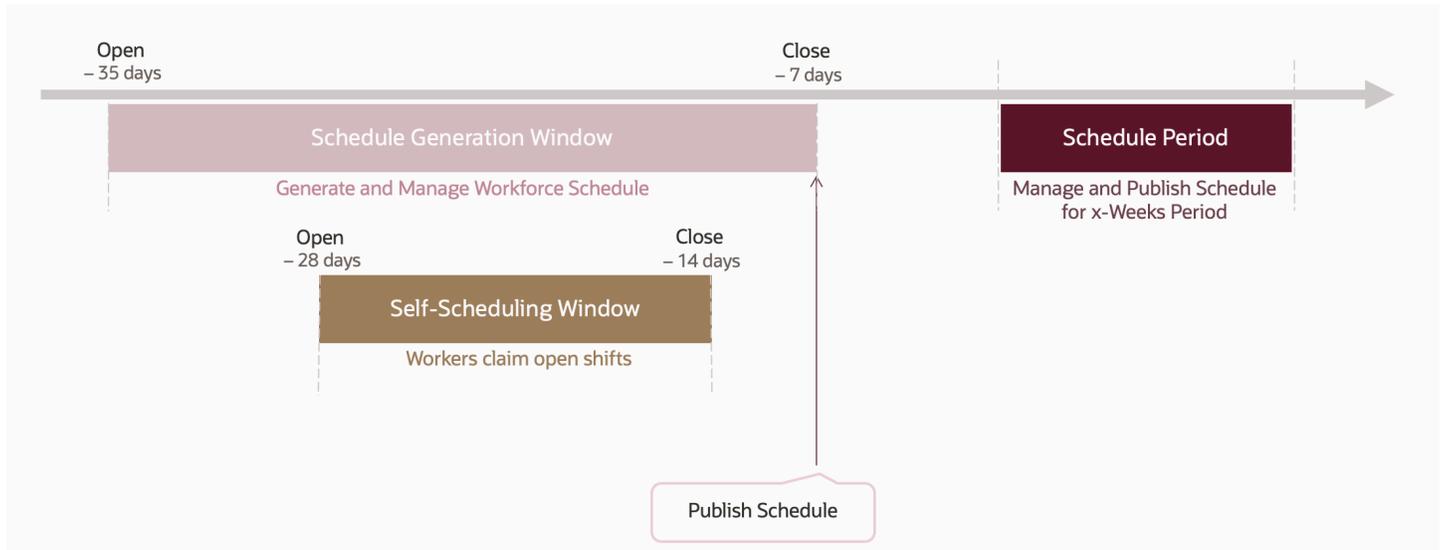
You manage these profiles using the Schedule Generation Profiles quick action for **My Client Groups** > **Workforce Scheduling**. You can also use the Workforce Schedule Generation Profiles task in the Setup and Maintenance work area. The task is in the Workforce Deployment offering, Workforce Scheduling functional area.

When you create a schedule generation profile, you enter basic details, such as the name, identifying code, active start and end dates, and a description. And you define the schedule periods, including how many weeks are in the schedule cycle, the day start time for your staffing departments, and which 2 consecutive days to consider as the weekend.

You also define the schedule generation window and the optional self-scheduling window contained within it. Schedule managers start working on their schedules when the schedule generation window opens. They publish the schedules to their workers after the self-scheduling window officially closes, if defined, and before the schedule generation window closes. Workers can claim open shifts during the self-scheduling window, and scheduling managers can assign the requested shifts.

You define the schedule generation window and optional self-scheduling window by specifying how many days before the schedule period starts to open and close each window. For example, you create a profile with these windows:

- The schedule generation window opens 90 days before the schedule period starts. And the window closes 30 days before the schedule period starts.

- The self-scheduling window opens 60 days before the schedule period opens. And the window closes 45 days before the schedule period starts. The self-scheduling window start and end dates need to be inside the schedule generation window start and end dates.

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Open
– 35 days

Close
– 7 days

Schedule Generation Window

Generate and Manage Workforce Schedule

Schedule Period

Manage and Publish Schedule
for x-Weeks Period

Open
– 28 days

Close
– 14 days

Self-Scheduling Window

Workers claim open shifts

Publish Schedule

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You can add day intervals for the coverage variance panel that schedulers open below their schedules. These intervals help them identify where they're overstaffed, understaffed, or staffed appropriately. You can also specify whether to send reminder notifications to schedulers to finish their schedules for publishing.

You add the shifts to use when generating the open shifts and the worker schedules. You add the schedule managers who will use the profile to generate and publish schedules for the added staffing departments. And you can specify whether schedulers can schedule floating resources.

You can optionally identify specific jobs and positions to include or exclude when generating schedules for the specified staffing departments. You can't include some jobs and positions and exclude others. You can only include or exclude all. If you don't add any jobs or positions, the profile can be used to generate schedules for all jobs and positions.

You can also specify these scheduling rules:

- The maximum consecutive days workers can work
- The maximum number of weekends workers can work in a schedule period
- A minimum rest period between the ending shift of 1 day and starting shift of the next day

You can also specify shift time deviation rules to use in time and labor schedule deviation calculations and validations.

- A grace period
- Start early and late periods
- End early and late periods

maximum consecutive days workers can work, and the maximum number of weekends they can work in a schedule period. And you can specify a minimum rest period between shifts.

You can save a draft of the schedule generation profile and finish it over time. When you're ready, you can create the profile so that schedulers can use it as soon as it becomes active.

You can create more profiles by duplicating an existing profile, and you can edit and delete profiles as long as no schedule was generated using it. As soon as a profile is used to generate schedules, you can't change or delete existing staffing departments. But you can add more staffing departments.

Related Topics
- Shift Limits in Time Processing

Alert Notifications for Workforce Scheduling

You can configure alert notifications that keep workers and schedule managers informed about the generated schedules, upcoming publish schedule dates, and the self-scheduling process.

Use the **Tools** > **Alerts Composer** task. To schedule the Process Workforce Scheduling Alerts process, use the **Tools** > **Scheduled Processes** task.

These are the relevant alerts:

Name	Code	Description	Send Method
HTS Work Pattern Created	ORA-HTS003	Notify worker that they've a new work pattern.	Automatically as part of the Create action

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Name	Code	Description	Send Method
HTS Work Pattern Deleted	ORA-HTS005	Notify worker of work pattern deletion.	Automatically as part of the Delete action
HTS Work Pattern Updated	ORA-HTS004	Notify worker that their work pattern was changed.	Automatically as part of the Update action
HTS Workload Consolidation During Active Schedule Period	ORA-HTS006	Notify schedule managers about workload values being updated during an active schedule period.	Automatically as part of the Update action
HTS Schedule Generation Failure Notice	ORA-HTS012	Notify schedule managers that their schedule generation failed.	Automatically as part of the Generate schedule process
HTS Schedule Generation Notice	ORA-HTS007	Notify schedule managers that their schedules were generated.	Automatically as part of the Generate schedule process
HTS Schedule to Finalize Before Publish	HTS_FINALIZE_SCHEDULE	Notify schedule managers about schedules that they need to finish before publish.	Automatically as part of the Generate schedule process
HTS Schedule Validation Completed	HTS_VALIDATE_SCHEDULE	Notify schedule managers that the schedule validation process completed.	Automatically as part of the Validate schedule process
Published Schedule alert for Scheduler	ORA-HTS009	Notify schedule managers that their schedules were published.	Automatically as part of the Publish schedule process
Published Schedule Notification for Worker	ORA-HTS008	Notify workers that their schedules were published.	Automatically as part of the Publish schedule process
Published Schedule with Open Shifts Alert for Float Worker	HTS_SCH_PUBLISH_WITH_FLOAT_WKR	Notify float workers that their schedules were published and there are open shifts they can claim.	Automatically as part of the Generate schedule process
Published Schedule with Open Shifts Alert for Worker	HTS_SCH_PUBLISH_NO_FLOAT_WKR	Notify workers that their schedules were published and there are open shifts they can claim.	Automatically as part of the Generate schedule process
HTS Workforce Schedule Unpublished for Scheduler	ORA-HTS011	Notification to Schedule manager that their schedule is unpublished	Automatically as part of the Unpublish schedule process
HTS Workforce Schedule Unpublished for worker	ORA-HTS010	Notification to worker that their schedule is unpublished	Automatically as part of the Unpublish schedule process
Self-Scheduling Period Opening Soon	HTS_SS_SCHEDULED_TO_OPEN	Notify workers that the self-scheduling period is opening soon.	Process Workforce Scheduling Alerts scheduled process
Self-Scheduling Period Closing	HTS_SS_SCHEDULED_TO_CLOSE	Notify workers that the self-scheduling period is closing soon.	Process Workforce Scheduling Alerts scheduled process
Self-Scheduling Period Open	HTS_SS_OPEN	Notify workers that the self-scheduling period is open.	Process Workforce Scheduling Alerts scheduled process
Self-Scheduling Period Closed	HTS_SS_CLOSED	Notify workers that the self-scheduling period is closed.	Process Workforce Scheduling Alerts scheduled process
Self-Scheduling Period Officially Closed	HTS_SS_CLOSED_SCHEDULER	Notify schedule managers that the self-scheduling period has officially closed.	Process Workforce Scheduling Alerts scheduled process

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Name	Code	Description	Send Method
HTS Schedule Publication	ORA-HTS001	Notify workers that new schedules are available	Automatically as part of the Publish schedule process
HTS Workforce Shift Assigned to Worker	HTS_SHIFT_ASSIGNED_TO_WORKER	Notify the worker that an assigned shift was added to their published schedule.	Automatically as part of the Assign Shift action
HTS Workforce Shift Updated for Assigned Worker	HTS_SHIFT_UPDATED_WORKER	Notify the worker that an assigned shift was updated in their published schedule.	Automatically as part of the Edit Shift action
HTS Workforce Shift Unassigned to Worker	HTS_SHIFT_UNASSIGNED_WORKER	Notify the worker that a shift was unassigned from their published schedule.	Automatically as part of the Unassign Shift action
HTS Workforce Shift Deleted for Worker	HTS_SHIFT_DELETED_WORKER	Notify the worker that an assigned shift was deleted from their published schedule.	Automatically as part of the Delete Shift action
New Open Shift Alert to Workers	HTS_ADD_SHIFT_WKR	Notify workers that new open shifts were added to a schedule period.	Automatically as part of the Add action
HTS Shift Filled	HTS_SCHEDULE_ME_OPPORTUNITY_FILLED	Notify schedule manager when a schedule-me opportunity is filled.	Automatically as part of the Accept action

Workload Management for Workforce Scheduling

As a schedule manager, you can review the detailed workload requirements on read-only workload pages. You can see the consolidated workload data for the baseline and current real-time workload requirements for each job, competency, and shift type. For more focused review, you can filter by job role.

The workload baseline, adjusted, and actual requirements are imported using HCM Data loader and the Workload Plan object. The imported information is then processed using the Workload Consolidation process. You can view the results of the consolidation on the workload management pages and in the coverage by variance drawer of specific workforce schedules.

Open the Workload Management page using the **My Client Groups** > **Workload Management** quick action.

Related Topics
- Guidelines for Loading Workload Plans for Workforce Scheduling

Generate Workforce Schedules

As a schedule manager, generate workforce schedules for workers in the specified staffing departments that you support. Use the My Client Groups > Workforce Schedules quick action.

On the Workforce Schedules page, the Generate Schedule button opens the Generate schedule drawer where you select the appropriate schedule generation profile, staffing departments, scheduling period, and schedules.

Generate schedules using one of these options:

Schedule Generation Option	Description
Only fixed time work patterns	Generate the schedules for only workers who have fixed days and time work patterns.
Open shifts and fixed time work patterns	Generate the schedules for only workers who have fixed days and time work patterns. Then generate open shifts that match the remaining workload. Workers can claim these open shifts during the self-scheduling period, and schedule managers can assign them.
Automatically assigned	Generate schedules that match the workload for all workers given their work patterns, their weekly FTE hours and the configured scheduling rules.

Note: The workforce schedules you can generate depend on the staffing departments for schedule generation profiles with you as a scheduler, and your area of responsibility.

When the generate schedule process runs, it checks the schedule against these items:

- Scheduling rules set in the schedule generation profile
- Workers' work patterns
- Overlapping shifts
- Approved absences
- Department assignments
- Overstaffing and understaffing coverage variances

So that the process applies these rules correctly, it also considers the previous and next schedules for the affected workers. For example, while checking that the rest period between work shifts is honored, the process needs to see if the worker was scheduled to work the day before this schedule period starts.

Related Topics
- How You Secure Person Records by Area of Responsibility
- Secure Person Records by Area of Responsibility

Manage Workforce Schedules

Manage the workforce schedules for the staffing departments you support using the My Client Groups > Workforce Schedules quick action. For example, view a schedule and any associated notes, add open shifts, assign shifts, publish future schedules, and unpublish schedules.

You can see the shifts organized by job or worker, for the day, week, or 2 weeks on the schedule page. And you can view critical information when you hover your mouse over a shift. You can also open the shift details drawer by right-clicking and selecting shift details.

To review Job view coverage variance details for each day, in both 1-week and 2-week timelines, open the coverage variance drawer under the schedule. You can review the number of hours or workers you're overstaffed or understaffed for each job by daily intervals. Overstaffing and understaffing variance hours appear in red to help you identify schedule gaps.

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To review schedule metrics for workers with shifts, such as their FTE, total scheduled regular hours for the metrics range, scheduled on-call hours, and total scheduled hours for the whole schedule period, open the drawer under the Worker view. For floating resources, total scheduled includes all departments their scheduled for, not just the department the schedule is for. Total scheduled doesn't include on-call hours, absences, or paid breaks. If the total scheduled hours don't match the worker's FTE in the metric range, the hours are highlighted in red.

You can validate the schedule against these items:

- Scheduling rules set in the schedule generation profile

- Workers' work patterns • Overlapping shifts

- Absences that are approved or pending approval

- Department assignments

- Overstaffing and understaffing coverage variances

So that the process applies these rules correctly, it also considers the previous and next schedules for the affected workers. For example, while checking that the rest period between work shifts is honored, the process needs to see if the worker was scheduled to work the day before this schedule period starts.

Use the Jobs view **More Actions** > **Validate Schedule** option.

You're limited in what you can do with shifts during the self-scheduling windows. For example, you can't publish the schedule during this window or change worker-claimed shifts.

> **Note:** The workforce schedules you can access depend on the staffing departments for schedule generation profiles with you as a scheduler, and your area of responsibility.

Tips

- Shifts with day start times that fall on the previous or next day are marked on the calendar day with an * (asterisk).

- Public holidays defined for locations and using geographical trees show on workforce schedules, as do pending and approved absences. So do shifts with swap, drop, and cover requests. You can access pending approval details from the shift details drawer.

- Color bars on the left side of shifts identify assignment sources and if the worker is a floating resource:

  - Black: Automatically staffed as part of the schedule generation process

  - Green: Assigned worker is floating from another department

  - Teal: Worker assigned the shift to them self

  - Lavender: Scheduler assigned the shift

Related Topics
- How You Secure Person Records by Area of Responsibility
- Secure Person Records by Area of Responsibility

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5 Worker Self-Scheduling

Overview of Workforce Self-Scheduling

You can proactively manage your workforce schedules by selecting regular and on-call shifts that align with your preferences and availability. Do this during self-scheduling windows and after a schedule is published using the Calendar task for **Me** > **Workforce Scheduling**.

You'll get notifications that a self-scheduling window is opening shortly, that the window is open, that it's closing soon, and that it's closed. You'll also get notifications if new shifts become available for a published schedule.

You can withdraw requests to claim shifts during the self-scheduling window. You can drop shifts and ask others to cover shifts for you during the schedule period. You can also accept coverage requests from others.

You can swap your assigned shift with up to three other shifts, if your shift start time is at least 72 hours away. If your request gets declined and there's still time, you can try again with different shifts. Otherwise, you need to work your original shift. You can also withdraw each swap shift request separately.

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