

Oracle Workforce Scheduling
V5.0.2
Statement of Direction

June 2007

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INTRODUCTION

Oracle Workforce Scheduling (OWS) offers companies a comprehensive solution to forecasting the demand for labor and scheduling the right people to the right activities at the right time to meet customer service and cost objectives.

Controlling labor hours, and hence cost, is one of the biggest problems facing labor intensive industries. Oracle Workforce Scheduling is a simple to use system that can reduce overstaffing and understaffing, increase customer service, and reduce payroll costs. The powerful mathematic optimization routines fully support 24/7 working and take into account factors such as: demand, employee preferences, skills, availability, labor laws, payroll budgets, workplace rules, best practice, and seasonality.

The latest release of OWS V5.0.2 is a stand-alone system targeted towards solving employee-scheduling problems predominantly within the retail sector, but the underlying technology can be applied to many other industries.

The new features in V5.0.2 include:

Mid week rescheduling – enabling organizations to be more proactive in response to changes in demand and availability.

Unlimited number of shifts per day and unlimited number of paid or unpaid breaks – giving greater flexibility in the type of organizational model that can be supported and comprehensive support for split shifts

Support for UTF – 8 character set – enabling translation into any left-to-right reading language

Support for minor rules – enabling easier configuration and support for some locations

Improved Event management – enabling greater flexibility in where in the organization events are defined

Improved User Interface – giving a look and feel similar to other modules in Oracle's HR suites.

MAJOR FEATURES

Simple to Use

Managers are there to manage and not spend excessive amounts of time planning staff schedules. Oracle Workforce Scheduling is very simple and easy to use, allowing managers to complete the weekly planning cycle in five steps or less:



An easy to view visual indication of progress is given for each step of the weekly planning cycle and includes a “My Issues” feature that reminds the user of any warnings, alerts, or errors in the current or previous steps. The system has been designed with high turnover, minimum training environments in mind.

Any or all of the steps can be automated to give organizations complete control of the planning and scheduling process.

Five user roles are supported, which ensure the user is presented with the data required for their job in a logical and succinct manner.

Forecast and Demand Planning

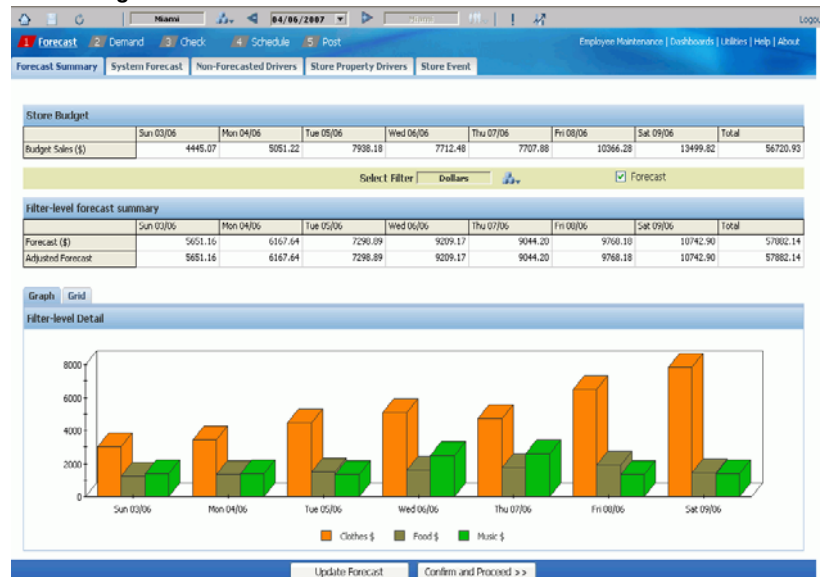
The Oracle Workforce Scheduling forecast and demand planning screens let managers view corporate budgets and operational targets during the planning process, plus leverage the power of a statistical analysis engine to provide the shape of business over the day and over the week. Managers have the ability to monitor, edit, and influence forecasts using comparable weeks, location properties, recent business trends, and the impact of events and promotions. Using principle-based labor standards, managers can convert forecasts into an activity-based workload with the simple push of a button.

The business model can be driven by an unlimited number of drivers (such as sales, items, and customers), and compression algorithms can be used to ensure workload is kept within targets.

BUSINESS MODEL CAPABILITIES

- Easy to configure
- User maintainable
- Simple tree structure
- Multiple Week Types
- Unlimited number of drivers
- Unlimited number of activities
- Activity demand driven by forecasts, store properties and special events
- Time granularity down to 15 min
- Parameters defined and managed at any organizational level
- Corporate or local event / task support
- Limit workload to budget if required
- Five user roles: Location Manager, Regional Manager, Corporate Operations, HR Administrator, Corporate Administrator

Forecasting Screen



Schedule Optimization

OWS's sophisticated scheduling algorithms produce near optimal schedules quickly and efficiently. The system uses a variety of mathematical modeling techniques to provide a solution that maximizes compliance with personnel and workload requirements while using the minimum number of hours. The technique has been honed over many years of practical experience to produce the correct balance between execution time and schedule performance.

A wide range of personnel and business rules are considered, such as available hours, preferred hours, fixed hours, skill priority, proficiency, minimum time between shifts, and fair distribution of working durations. Activities that have no predicted workload but require a presence (such as key holder or first-aider) are allocated in parallel with demand-driven activities. Special activities, such as staff meetings, can also be easily accommodated.

Schedule Review and Edit

Schedules can be reviewed and, if required, edited at a weekly or daily level through easy to use "Gantt" style screens. The impact of any edits on coverage can be seen in real time, and all changes to the schedule can be checked to ensure they are in compliance with the business and personnel models. Whole days or specific shifts can be swapped between employees easily.

The schedule displays can be grouped by department or name and ordered by name, worked hours, start time, and so on to reflect the user's preferred way of working.

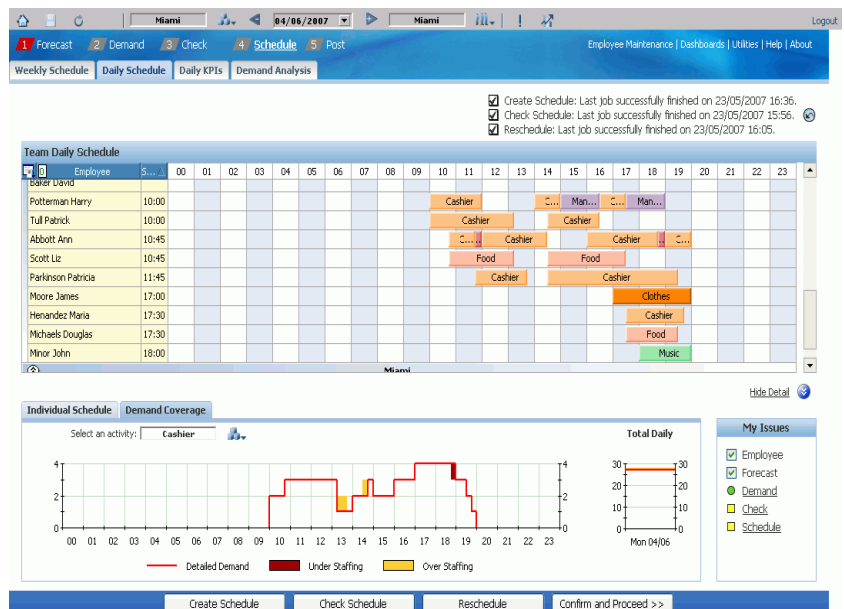
Various rescheduling options are provided allowing for mid-week or department rescheduling and also reallocation of activities without changing working times to ensure maximum coverage in response to last minute changes in demand or availability.

Various KPIs are available to measure the quality of the schedule, including demand coverage and scheduled productive costs.

SCHEDULING CAPABILITIES

- User defined scheduling objectives: cost, employee preference etc.
- Mid week / department rescheduling
- Minor rules
- Unlimited fixed, preferred, and available time bands per day
- Rotating shifts
- Min / max hours per shift and day
- Unlimited number of paid or unpaid Breaks
- Skill priority / proficiency
- Min time between shifts
- Min / max hours per day and week
- Min / max days per week
- Max consecutive working days over 1 or 2 weeks
- Two consecutive days off over 1 or 2 weeks
- Max late nights per week
- 'Core coverage'
- Min / max staffing on an activity
- Max % of non-management jobs

Daily Schedule Review Screen.



When review and edit are complete, the Post step allows a final review of KPIs and the generation of weekly and daily schedule reports. At this stage, the schedule could also be exported to a Time and Labor system for compliance monitoring.

An Enterprise Solution

Oracle Workforce Scheduling supports central model build and maintenance through a simple Solution Designer tool and is suitable for organizations with just a few or very many employees in each schedule location. It is highly scalable and this has been tested to over 200,000 employees.

OWS is currently available in English and can be translated into any left-to-right reading language. Multiple languages can be supported within a single configuration.

An Integration Server is included to enable XML-based communication to other systems to be configured easily. This enables the import of HR data, budgets, forecasts, business drivers such as EPOS data and the export of schedules.

AVAILABILITY

The 5.0.2 release of Oracle Workforce Scheduling is targeted for calendar Q3 2007, but this remains subject to change without notice.



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