Oracle® Cloud

Administering and Working with Oracle Strategic Workforce Planning Cloud

E96237-05

Oracle Cloud Administering and Working with Oracle Strategic Workforce Planning Cloud,

E96237-05

Primary Author: EPM Information Development Team

Contents

5 Configuring Workforce

6 Updating Strategic Workforce Planning and Workforce

Part II Working with Strategic Workforce Planning

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Feedback

To provide feedback on this documentation, send email to epmdoc_ww@oracle.com, or, in an Oracle Help Center topic, click the Feedback button located beneath the Table of Contents (you may need to scroll down to see the button).

Follow EPM Information Development on these social media sites:

LinkedIn - http://www.linkedin.com/groups?gid=3127051&goback=.gmp_3127051

Twitter - http://twitter.com/hyperionepminfo

Facebook - http://www.facebook.com/pages/Hyperion-EPM-Info/102682103112642

Google+ - https://plus.google.com/106915048672979407731/#106915048672979407731/posts

YouTube - https://www.youtube.com/oracleepminthecloud

1

Welcome to Strategic Workforce Planning

Related Topics

- About Strategic Workforce Planning
  Oracle Strategic Workforce Planning Cloud translates long-term corporate strategy into execution plans by ensuring that the strategy is supported by the right workforce:
- Learning More About Strategic Workforce Planning
- Related Guides

About Strategic Workforce Planning

Oracle Strategic Workforce Planning Cloud 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—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 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 FTE.

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:

- Compensation Planning
- Other Expenses
- Demographics
- Analysis

Learning More About Strategic Workforce Planning

To get more information or help about Oracle Strategic Workforce Planning Cloud 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

Oracle Strategic Workforce Planning Cloud belongs to the Oracle Fusion Human Capital Management 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 Enterprise Performance Management Cloud components.

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

- Getting Started for Administrators
- Getting Started for Users

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
- Designing with Financial Reporting Web Studio

User:

- Working with Planning
- Working with Financial Reports
- Viewing Financial Reports on a Mobile Device
- Working with Smart View
- Predictive Planning
- Accessibility Guide

Administration:

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

Development:

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

Part I

Administering Strategic Workforce Planning

Related Topics

2

Setting Up Your Application

Related Topics

- Implementation Checklist
- Creating an Application

Implementation Checklist

Perform these tasks to set up Oracle Strategic Workforce Planning Cloud:

1. Create a Strategic Workforce application. See Creating an Application.
2. If your application is multicurrency, use the Dimension Editor to add dimension members for each currency. See *Administering Planning for Oracle Planning and Budgeting Cloud*.
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.

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.

   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. To define the approval process, define the approval units and promotional paths for approving plans in your organization. See Administering Planning for Oracle Planning and Budgeting Cloud.

Creating an Application

To create an application:

1. Log in and select **Start** under **Human Capital**.
2. Enter an application name and description and then click **Next**.
3. 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 2018, select 2017 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.

- **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**—Oracle Strategic Workforce Planning Cloud delivers an 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 Strategic Workforce Planning.

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

3
Familiarizing Yourself with Strategic Workforce Planning

Related Topics

- Navigating in Strategic Workforce Planning
- Reviewing Artifacts

Navigating in Strategic Workforce Planning

Useful navigation tips:

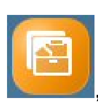
- To return to the Home page when you've navigated away from it, click the Oracle logo in the upper left corner (or your custom logo) or the Home icon  .
- To see additional administrator tasks in the Navigator, click the horizontal bars next to the Oracle logo (or your custom logo) .
- Expand a dashboard 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, 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 Expenses. The vertical tabs are different depending on the features that you've enabled.

  Use the horizontal tabs to switch categories within a task.

Reviewing Artifacts

To review the artifacts in your application:

1. Click **Application** , then **Configure** , and then select a business process.
2. From the **Actions** menu, select **Review Modified Artifacts**.

3. Click **Filter** to select different artifact types.

   You see all the artifacts that have been provided by Oracle, and you can see if modifications have been made to the artifacts.

4

Configuring Strategic Workforce Planning

Related Topics

- Enabling Strategic Workforce Planning
- Configuring Strategic Workforce Planning
  You configure Oracle Strategic Workforce Planning Cloud 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.
- Strategic Workforce Planning Post Configuration Tasks
- Strategic Workforce Planning Rules

Enabling Strategic Workforce Planning

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

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

Watch this tutorial video on enabling Strategic Workforce Planning:

Tutorial Video

> **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.

Table 4-1 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.

Table 4-1 (Cont.) Strategic Workforce Planning 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 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**.

Identifying the Level of Workforce Detail to Capture

Your selection for **Granularity** in Oracle Strategic Workforce Planning Cloud 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 4-2 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*>).

Table 4-2 (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. 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, Oracle Strategic Workforce Planning Cloud 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 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 of 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 Oracle Strategic Workforce Planning Cloud 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.

Watch this tutorial video to learn about configuring Strategic Workforce Planning:

Tutorial Video

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.

Table 4-3 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	Optional 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. 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 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.

Table 4-3 (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.

Table 4-3 (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: do you need to retrain people, hire people, transfer people, 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 for Oracle Planning and Budgeting Cloud.
<Custom Dimension Name, such as Projects>	Optional Populate the application with a dimension you added, such as projects, by importing members into the dimension.

Planning and Forecast Preparation

You can configure the timeframe and granularity for plans for each business process. Configuration settings are stored separately, so you can have a different timeframe and granularity for each business process and for each year.

To configure the timeframe and granularity 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 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, **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 FY18 but quarterly in FY19, select **Monthly** in the row for FY18 and **Quarterly** in the row for FY19.
6. Click **Forecast** and repeat these steps to specify the forecasting basis.

This configuration task sets all required substitution variables.

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 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.

Setting Global Assumptions: Exchange Rates

If you created a multicurrency application, set up exchange rates. You can enter exchange rates manually as described below, or import them. For information about importing exchange rates, see *Administering Planning for Oracle Planning and Budgeting Cloud*.

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, you must enter exchange rates in that version.

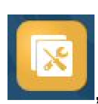
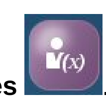
Strategic Workforce Planning Post Configuration Tasks

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

Setting User Variables

Perform this task after features are enabled and configured.

Each planner must set the variables described below.

1. From the Home page, click **Tools** , and then **User Variables** .
2. Set up these user variables:
   - Currency
   - Entity
   - Job Type

- Reporting Currency
- Scenario—Set the scenario for Workforce
- Scenario View—Set the scenario for Oracle Strategic Workforce Planning Cloud
- 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

Strategic Workforce Planning Rules

Run rules to calculate values in the application. From the Home page, click **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.
- **Process Loaded Data**— Run this rule after you import new data for Workforce.
- **Process Loaded Strategic Workforce Data**—Run this rule after you import new data for Oracle Strategic Workforce Planning Cloud. This rule copies the data to the necessary periods in the planning year range.
- **Rollup WFP Cube**—Run this rule to see aggregated data.

> **Note:**
>
> You can run the rules **Process Loaded Strategic Workforce Data** 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.

5

Configuring Workforce

Related Topics

- Enabling Workforce
- About Configuring Workforce
- Configuring Workforce
- Post Configuration Tasks
- Workforce Rules
  Run the Workforce business rules in the situations described here.
- Performance Considerations with Workforce Rules
  Consider these tips to potentially improve the execution performance of Workforce rules.

Enabling Workforce

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

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.
- 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.

Based on your selections, dimensions, drivers, forms, and accounts are populated.

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

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.

Table 5-1 Workforce Enable Features

Feature	Description
Granularity	Select the level of workforce detail to manage. • Select **Job** to manage job workforce expenses at the job-only level. • Select **Employee and Job** to manage workforce expenses by both employees and jobs. If you already enabled Strategic Workforce Planning, Granularity for Workforce is already set based on what you enabled in Strategic Workforce Planning. See Identifying the Level of Workforce Detail to Capture.
Expense Planning	Select which workforce-related expenses to manage: If you select **Expense Planning**, then **Compensation Planning**, 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. You can select **Merit Based Planning** only if you enable granularity for **Employee and Job**.
Headcount Planning	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.

Table 5-1 (Cont.) Workforce Enable Features

Feature	Description
Workforce Management	Select to plan expenses based on employee or job hiring, terminating, and transferring to another department. **Workforce Management** options: • **New Hires**—Enables planning for new hires and their impact on expenses. • **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.
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.

Identifying the Level of Workforce Detail to Capture

Your selection for **Granularity** in Oracle Strategic Workforce Planning Cloud 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*>).

Table 5-2 (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. 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.

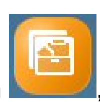
About Configuring Workforce

For most configuration tasks, if you've already configured them in Oracle Strategic Workforce Planning Cloud 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 this task after you’ve enabled Workforce features.

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

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 5-3 Configuring 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.

Table 5-3 (Cont.) Configuring Workforce

Configure	Description
Planning and Forecast Preparation	Optional 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 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.
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.

Table 5-3 (Cont.) Configuring Workforce

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, 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.
Non Compensation Expenses	Optional Set up non compensation expenses such as training or travel expenses. Add, import, or export a non compensation expense. After non compensation 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.

Table 5-3 (Cont.) Configuring Workforce

Configure	Description
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	Optional Import skill sets used in your organization by importing members into the Skill Set dimension.
Union Codes	Optional Import union codes used in your organization by importing members into the Union Code 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.

Table 5-3 (Cont.) Configuring 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. **Note:** Oracle recommends that you use the default age bands instead of loading your own. **Note:** 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.

See Importing Data. You can also add members using the dimension editor.

Tip:

After importing dimensions and members, you can view the hierarchical structure in the dimension editor.

Planning and Forecast Preparation

You can configure the timeframe and granularity for plans for each business process. Configuration settings are stored separately, so you can have a different timeframe and granularity for each business process and for each year.

To configure the timeframe and granularity 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 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, **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 FY18 but quarterly in FY19, select **Monthly** in the row for FY18 and **Quarterly** in the row for FY19.
6. Click **Forecast** and repeat these steps to specify the forecasting basis.

This configuration task sets all required substitution variables.

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 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.

Setting Global Assumptions: Exchange Rates

If you created a multicurrency application, set up exchange rates. You can enter exchange rates manually as described below, or import them. For information about importing exchange rates, see *Administering Planning for Oracle Planning and Budgeting Cloud*.

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, 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.

> **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 *Administering Planning for Oracle Planning and Budgeting Cloud*.

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 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.

> **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.

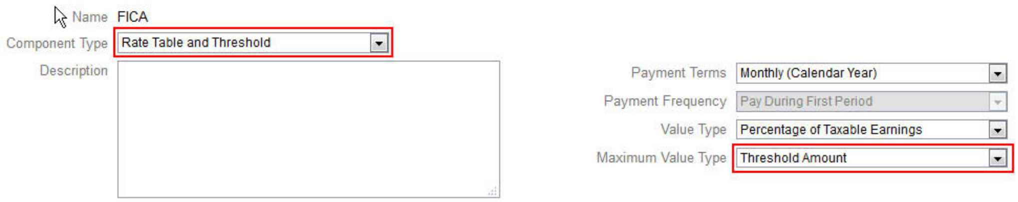
For example, if a benefit needs to be paid once every six months in February and August, then select **Payment Terms** as **Semiannually (Calendar)**, **One-time Pay** as the **Payment Frequency**, and Second Month in the **One-time Pay Options**.

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 new options in the Benefits and Taxes wizard on the **Details** page for the component.

About Maximum Value Type

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



Setting the **Maximum Value Type** to **Threshold Amount** is available only for Taxes (not 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 the **Maximum Value Type** is not set to **Threshold Amount**, then the assignment of each option or tier row is relevant and needs to be assigned appropriately.

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.)

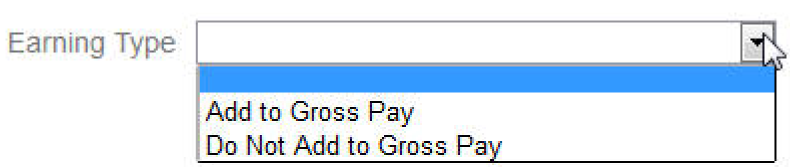
Example:

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

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

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 input 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.

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, including 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.

> **Tip:**
>
> See the following 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

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

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
- **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;
ENDIF;
```

Use Case

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, 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.

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
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_Expense amount"=("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_Expense amount"=(("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_Expense amount"=(("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
        "OWP_Expense amount"=(1300-1200)*(30/100) + (1200-1000)*(20/100) +
1000*(10/100);
    ENDIF
ENDIF
```

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%.

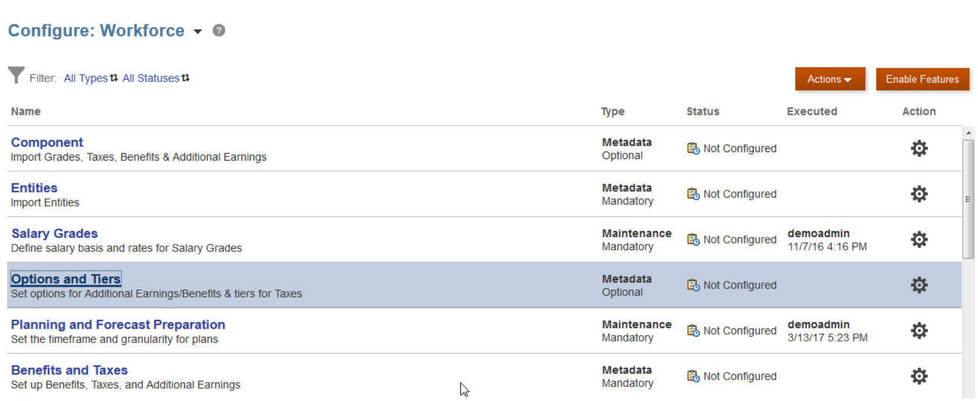
Before you start, we assume that:

- 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**.



4. On **Options and Tiers**, from **Component**, select **Options**.

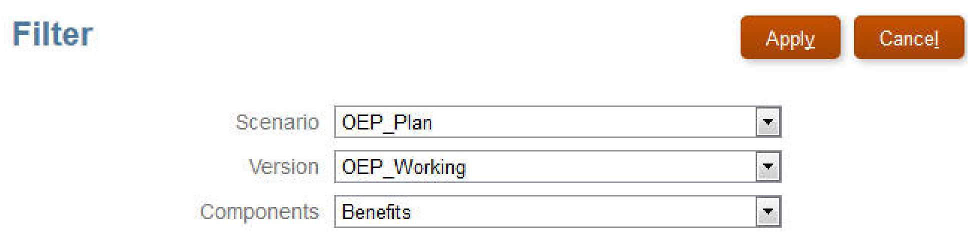
5. From **Actions**, select **Add**, then in the text box, enter "Fringe Rate – North America". Repeat to add an option for EMEA and APAC:

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

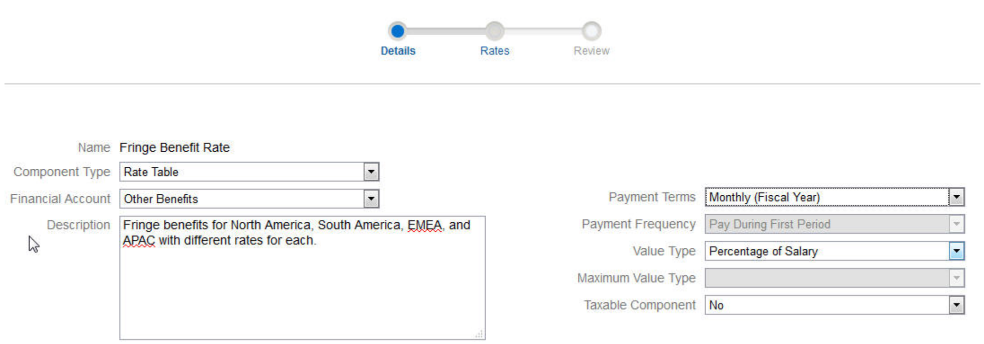
Define the Fringe Benefit

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

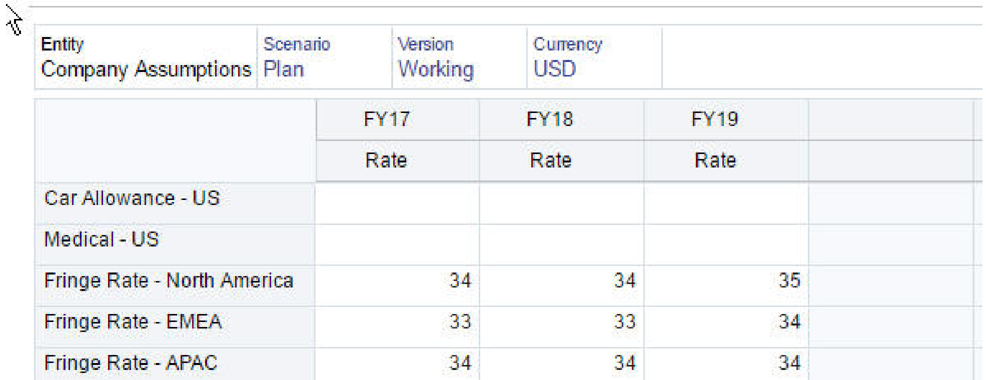
1. From **Configure: Workforce**, click **Benefits and Taxes**.
2. Click Filter .
3. Select the Scenario and Version for the fringe benefit and from **Components**, click **Benefits**, and then **Apply**:



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



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



Entity	Scenario	Version	Currency
Company Assumptions	Plan	Working	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 I 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 I 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 I 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.
   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
- Setting Defaults
- Synchronizing Defaults
- Post Update Tasks
  After updating Workforce content from the 18.07 monthly patch, note the following changes.

Setting Assumptions

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

- Hours worked per day, week, and month, which drive salary expenses for hourly employees.
- The partial payment factor (that is, the pay percentage to apply to Maternity Status).
- The salary basis (for example, annual) and rate for Salary Grades.
- Set merit rates, which are added to salary calculations.

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. The exception to this is Merit Rate, which must be set at the entity level.

Administrators set workforce assumptions during configuration. If they're granted permissions, planners can then update them as needed by clicking or tapping **Compensation Planning**, then the **Assumptions** tab .

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, select the OWP_All <*member*> when setting defaults for salary, additional earnings, benefits, and taxes. 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 same compensation element default as Tom Blue in the Warehouse (whose Union Code is Teamsters).

> **Note:**
>
> Workforce seeds a level-zero 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 Smart List. To meet this need, Workforce expects you to add at least one level-zero null metadata member to Total 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**.

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.

Post Update Tasks

After updating Workforce content from the 18.07 monthly patch, note the following changes.

Important information for current Workforce customers:

- Immediately after updating the Workforce 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, 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.
- This update includes two new rules to support more flexibility in managing hiring requisitions: **Add Requisition** and **Change Requisition**. To make these 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.
- Workforce enhancements available in 18.07 required updates to some artifacts. If you haven’t modified these artifacts, then the artifacts and features are available to you automatically with the 18.07 update. Because customized artifacts are not updated during this update, if you have made updates to these artifacts and want to take advantage of the new features, review the information in the appendix Updating Workforce Artifacts to Use New Features.
- 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.

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 with Workforce Rules.

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

- **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.

  – 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**.
- **Process Loaded Data**—After you import new data, run the rule **Process Loaded Data** to copy the data to the necessary periods in the planning year range.

> **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.

Performance Considerations with Workforce Rules

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

- Workforce rules 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 the rules **Synchronize Defaults**, **Synchronize Component Definition**, and **Process Loaded Data**. If you modify the `FIXPARALLEL` statement to reflect your optimal dimension, all three rules take advantage of the performance enhancement.

  > **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. Replace {`Department`} (which is the default Entity dimension in this template) with your optimal dimension and include the appropriate Entity selection in the subsequent `FIX` statement. See this BEFORE and AFTER example.
     BEFORE:

     ```
     SET UPDATECALC OFF;

     FIXPARALLEL(4,@RELATIVE({Department},0))

     FIX({Scenario}, {Version} [FlexDim1Fix] [FlexDim2Fix] [FlexDim3Fix]
     [CurrencyDTP])
        FIX([EmpDimFix] [JobDimFix])
     ```

     AFTER, modified assuming that `Project` is `FlexDim1` and using sample member names (`"All Project"` and `"OEP_Total Entity"`). Also note the comma inserted before the reference to `Entity` in the second `FIX` statement:

     ```
     SET UPDATECALC OFF;

     FIXPARALLEL(4,@RELATIVE("All Project",0))

     FIX({Scenario}, {Version} ,@RELATIVE("OEP_Total Entity",0) [FlexDim2Fix]
     [FlexDim3Fix][CurrencyDTP])
        FIX([EmpDimFix] [JobDimFix])
     ```

> **Note:**
>
> When you modify the template, ensure that the syntax (for example, the commas) is valid and balanced by reviewing the Design-time Prompts (DTP).

2. Redeploy the three rules.

> **Note:**
>
> Test your changes in your Test instance before applying the changes in Production.

- 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** template in place of the **Synchronize Definition** template in the same relative position. By doing this, you eliminate the execution time of the **Synchronize Definition** template, which is unnecessary if you include the **Synchronize Defaults** template 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**.

6

Updating Strategic Workforce Planning and Workforce

When you update Oracle Strategic Workforce Planning Cloud and Workforce, 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 flows, Oracle recommends that you make a copy of the predefined navigation flows and work in the copy, not the original. When you update, Oracle applies the update to the original navigation flows 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.

Part II

Working with Strategic Workforce Planning

Related Topics

- Task Overview
- Using Average Compensation Rates
- Skills Assessment Planning
- Demand Planning
  Demand analysis gives you insight into what resources—headcount or FTE and strategic jobs—that the long-term strategy requires. This information helps you to be proactive in planning resources and preparing for their needed skill sets.
- Supply Planning
  With supply planning, you look ahead at how your workforce resources will meet your workforce demands.
- Analyzing the Gap Between Demand and Supply

7 Task Overview

Related Topics

- The Workflow for Strategic Workforce Planning
  To analyze future workforce requirements using Oracle Strategic Workforce Planning Cloud, review the tasks you'll perform.
- Setting User Variables

The Workflow for Strategic Workforce Planning

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

Watch this tutorial video for an overview of the workflow in Strategic Workforce Planning:

Tutorial Video

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** .

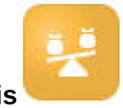
   See Skills Assessment Planning.
4. Review and update the assessment of employee across different skills and jobs. Click **Skills Assessment** .

   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**  .

   See Supply Planning.

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

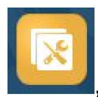
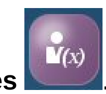
   See Analyzing the Gap Between Demand and Supply.

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

Setting User Variables

Perform this task after features are enabled and configured.

Each planner must set the variables described below.

1. From the Home page, click **Tools** , and then **User Variables** .
2. Set up these user variables:
   - Currency
   - Entity
   - Job Type
   - Reporting Currency
   - Scenario—Set the scenario for Workforce
   - Scenario View—Set the scenario for Oracle Strategic Workforce Planning Cloud
   - 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

8 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.

9

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.

Watch this tutorial video to learn about rating employee skills:

Tutorial Video

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 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, say that the 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.

10
Demand Planning

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

Watch this tutorial video to learn about working with demand drivers:

Tutorial Video

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 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.

> **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 for Oracle Planning and Budgeting Cloud*.

- 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. Say 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: revenue units, support representatives, production personnel, support calls, insurance policies, transactions, and so on.

Your administrator configures demand drivers when configuring Oracle Strategic Workforce Planning Cloud.

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:

- Assign the demand driver that is appropriate for each strategic job.
- Can 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.

- Can 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).

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 Oracle Strategic Workforce Planning Cloud.
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 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 a 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.

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 X% means that for each time the demand driver doubles (for example, the number of calls to the Call Center), the productivity becomes X% 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 Oracle Strategic Workforce Planning Cloud 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.

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. 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.

11

Supply Planning

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

Watch this tutorial video to learn about working with supply calculations:

Tutorial Video

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. Oracle Strategic Workforce Planning Cloud 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.

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. 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.

12 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 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.

Part III

Working with Workforce

Related Topics

- Task Overview
- Managing Compensation Expenses
- Managing Non Compensation Expenses
- Managing Demographics
- Analyzing Workforce Expenses
- Reporting on Data
  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.

13
Task Overview

Related Topics

- The Workflow for Workforce
- Setting User Variables

The Workflow for Workforce

If your administrator enabled both Oracle Strategic Workforce Planning Cloud 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.

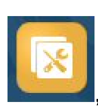
Table 13-1 Strategic Workforce Planning Tasks

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 Non Compensation 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

Perform this task after features are enabled and configured.

Each planner must set the variables described below.

1. From the Home page, click **Tools** , and then **User Variables** .
2. Set up these user variables:

- Currency
- Entity
- Job Type
- Reporting Currency
- Scenario—Set the scenario for Workforce
- Scenario View—Set the scenario for Oracle Strategic Workforce Planning Cloud
- 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

14

Managing Compensation Expenses

Before updating employee-related information, you might want to 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 the **Actions** gear. (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.

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. Click **Actions**, and then **Add Hiring Requisitions**.
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 Year** and **Start Month** to set when the requisition's expenses are to be included in expense calculations, and then click **Next**.
   Optionally, select the **End Year** and **End Month** 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. At **Job and Salary Options**, select:
   - 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.

6. 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 TBH has been associated with a hired employee, see Updating Employee Compensation.

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.

> **Note:**
>
> To remove a requisition, follow Step 1 below, then select **Actions**, and then **Remove Hiring Requisition**. When a requisition is deleted, its associated FTE/headcount and compensation expenses are no longer included in calculations.

To update a hiring requisition:

1. Click **Compensation Planning**, then **Manage Employees**, and then **New Hires**.
2. Select the requisition to update.
3. Click **Actions**, and then **Change Requisition**.
4. At **Requisition Change**, select the option that applies, and then click **Next**:
   - **Status**—Select to set an informational description to the requisition: **New**, **Active**, **Approved**, **Unapproved**, **On-hold**, or **Closed**.
   - **Salary**—Select to update the salary basis, rate, or grade for the requisition. Skip to Step 5.
   - **Extend Calendar**—Select to change the requisition's end date. Calculations for a requisition's workforce expenses begin and end with the requisition's start and end dates. Skip to Step 6.
   - **Reduce Calendar**—Skip to Step 7.
5. To update the salary associated with the requisition:
   - **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 **End Year** and **End Month**.
      Specifying an end month and year saves you from having to plan their departure using the Plan Departure rule. Note that you must select both the end year and month.
7. To reduce the time span of the requisition, select the **End Year** and **End Month**.
   You must select both the end year and month.
8. Click **Launch**.
   The Additional Earnings, Benefits, Taxes, headcount, and so on are calculated for the specified requisitions during the time range you specified.

Updating Employee Compensation

To view and update employee compensation:

1. Click **Compensation**, and then **Employee Details**.
2. Update the information as needed.

Changing an Employee's Status

To change an employee's status:

1. Click **Compensation Planning**, then **Manage Employees**, and then **Existing Employees**.
2. Select the employee in the row, and then from the **Actions** gear, click **Change Employee Status**.
3. 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.

4. Select the month, year, and duration of the status. You can also add a comment.

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. Click the row containing the hiring requisition to associate with the new hire, then **Actions**, and then **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**.
4. Select the pertinent date and information.
   For example, select the month, year, reason the employee is leaving, and add optional comments.

The employee's workforce expenses aren't included in calculations after the departure month.

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).

- 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 receiving department transfers in the employee.

> **Note:**
>
> After an employee is transferred out, their data is not retained in the former department as of the transfer month. When the employee is transferred to the new department, the status is set to Active for that department, and the employee's salary is calculated in the new department.

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 **Action**, and then **Transfer In**.

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

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.)
- 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**.

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.

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 copies the information from the substitution variables &CurYr and &CurMnth.

> **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 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.

15

Managing Non Compensation Expenses

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

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

16

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.

17
Analyzing Workforce Expenses

So that you can see the big picture of headcount, compensation, and 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 

and then explore the data presented on the vertical tabs.

18 Reporting on Data

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.

The data maps:

- Compensation Data for Reporting—For reporting on compensation information
- Headcount Data for Reporting—For reporting on headcount data
- Non Compensation data for Reporting—For reporting on non compensation information

To access the data maps:

1. Click **Application**
   
   , then **Data Exchange**
   
   , and then **Data Maps**.
2. Click the data map to use, and then from **Actions**, click **Push Data**.
   The data in the reporting cube is always cleared before data is pushed to it.

The *Administering Planning for Oracle Planning and Budgeting Cloud* guide describes how to set up and change data maps.

A

Importing Data

You can download data import templates for each business process 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 business process 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. Before importing data, configure the application as described in this help system and use Configure to import the dimensional metadata.

   > **Note:**
   >
   > Oracle recommends that you use Configure to import metadata, which ensures that metadata is loaded correctly to work with the provided rules and forms. If you choose to use the Dimension Editor to load metadata, the primary hierarchy for a dimension should go under the Total or All member for the dimension. You can add alternative hierarchies under the Root member as well, but the member should be a *Parent* or rollup type member. No parent or member should be set to rollup/aggregate to the root member of a dimension, because the root member can't be displayed on any form, dashboard, or report.

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

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

   a. Click **Navigator**, and then **Smart Lists** from **Create and Manage**.
   b. Select the Smart List, click **Edit**, and then **Entries**.
   c. Note the associated names.
6. Open the templates in Microsoft Excel, and customize them to specify your business data.
7. **Optional**: To ensure that your data will import and calculate correctly, import it into a test application first.
8. Import the data into your production application.
9. For the first data import, run the rules required to process and calculate the data. See the sections on each business process.

When customizing the templates:

- Don't enter zeros.
- To import data you must have one member at least 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.

Importing Strategic Workforce Planning Data

You can download Oracle Strategic Workforce Planning Cloud 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 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.

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.

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.

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 business processes, 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 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.

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.

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.

> **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.

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.
- `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.

B
Accessibility

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

All videos for this cloud service have HTML equivalent topics.

Enabling Screen Reader Mode

To enable screen reader mode, click the button at the top right corner of the page to open a dialog box with options for accessibility and color contrast.

Recommendations

If you use screen reading software, Oracle recommends that you use Internet Explorer. Some service component screens may not display properly if you use Google Chrome.

General Considerations and Notes

Note these general considerations for using keyboard equivalents and for online help.

Using Keyboard Equivalents

When you use keyboard equivalents, note that:

- The underlined letter that typically appears in a menu title, menu item, or button text is called a mnemonic. Because Oracle considers mnemonics to be self-documenting, additional documentation for mnemonics is not necessarily provided. You can use mnemonics where they are implemented.
- Some mnemonics are repeated. For example, on the File menu, the underlined mnemonic `D` is used for both the `Delete` and the `Deactivate` menu items. When mnemonics are repeated, the first time you press `D`, the item to be deleted is highlighted. Press `Enter` to delete or press `D` again to highlight the `Deactivate` button, and then press `Enter` to deactivate.
- Keystrokes listed are standard for PCs. iOS standard keys may be different.
- If you use a release later than Firefox 1.5, use `Alt+Shift` for `Alt` as the modifier.

For additional information, see Keyboard Equivalents.

Online Help

When screen reader support is enabled, the help window is rearranged so that the help topic is first in document order, displaying above the help toolbar. This is to ensure that the screen reader reads the help topic first when online help is invoked.

Additional information you may need when using online help:

- To help screen reader users, when a page loads in the Help Topic frame, scripting shifts focus to the loaded document. For example, when help is opened, focus is set on the Help Topic frame document.
- Use the `Virtual PC Cursor` option in the screen reader to read the help topic. Press `Insert+Z` to toggle the `Virtual PC Cursor` and use `JAWS` commands to read the text.
- HTML elements such as form controls typically function as would be expected for your browser (and screen reader, if applicable). Exceptions:
  - `Contents` page: The tree that displays the selected help system's table of contents, includes these link types:
    - Links containing the target topic titles. If you activate these links, the target topic opens in the Help topic frame, and focus moves to that topic.
    - Links that open subtopics. When focus is on these links, screen reader reads one of the following:
      - `Collapse Node` if the subtopic links are expanded; activating the link removes the subtopic links from the tab order.
      - `Expand Node` if the subtopic links are collapsed; activating the link places the subtopic links in the tab order.

      After activating this type of link, the next link in the tab order is the topic, followed by any subtopics.

      These links are located before their corresponding topic links in tab order. Press `Shift+Tab` to determine whether a topic has subtopics; if the screen reader reads `Expand Node` or `Collapse Node`, then the topic has subtopics.
  - `Index` and `Contents` pages: When a selection is made from the `Select product` drop-down list, the values currently on the `Select help system` drop-down list change to reflect the help system types available for the product. After changing the product, you must select the desired help system type.
- Search page:
  - If you are using a screen reader, and are in the search form or the forms to select a different help system in the Index and Contents tabs, the screen reader may use the `Enter` key for some purpose other than submitting the form. For example, the screen reader may use `Enter` to toggle Forms Mode in some contexts. If that happens, you can submit the form by using the shortcut for moving focus to the next button.
  - If the `All` checkbox is selected in `Search help for the following products`, any selected product check boxes are cleared.

- If the `All` checkbox is selected in `Search help for the following products` and then a product checkbox is selected, the `All` checkbox is cleared.
- If the `All` checkbox is selected in `Search help for the following products`, any selected help type check boxes are cleared.
- If the `All` checkbox is selected in `Search help for the following products`, and then a `help type` checkbox is selected, the `All` checkbox is cleared.

Table B-1 Online Help — Keyboard Shortcuts

Keys	Action
`Ctrl+Shift+1`	Open and move focus to the Table of Contents page, in the Navigation frame. The displayed Table of Contents entries are for the help system that contains the currently displayed help topic. The Table of Contents consists of frames containing the following: • A form to select a Table of Contents for a different help system. If you select a different help system, the help topic frame is also updated to display the help system's launch page. • The Table of Contents links.
`Ctrl+Shift+2`	Open and move focus to the index, in the Navigation frame. The displayed index entries are for the help system that contains the currently displayed help topic. The index consists of frames containing the following: • A form to select an index for a different help system. If you select a different help system, the help topic frame is also updated to display the help system's launch page. • Shortcut links to index entries, which are grouped by letter. • Index entry links
`Ctr+Shift+3`	Open and move focus to the Search frame in the Navigation frame.

Table B-1 (Cont.) Online Help — Keyboard Shortcuts

Keys	Action
`Ctrl+Shift+4`	Move focus to the content frame, which is the frame that contains help topics and search results. **Note:** If a page is not reading as expected, try toggling off `Forms Mode`.
`Ctrl+Shift+5`	Move focus to the toolbar frame, which contains links to various help features. **Note:** The toolbar includes a link to the help topic describing accessibility information.

Accessibility Features

These features are provided:

- Support for screen readers and magnifiers
- Keyboard navigation equivalents for all objects
- `Alt` and `Title` attributes for all objects, images, and page titles
- Support for expanding and collapsing trees using the `Enter` key and keyboard equivalents
- Data form access using keyboard equivalents
- Tab indexing, implemented from left to right on all pages
- A button at the top right corner of the page opens a dialog box with options for accessibility and color contrast

> **Note:**
>
> To read elements that are read only and do not get focus using keyboard navigation, use the arrow keys to read text. This applies, for example, to task list status.

> **Note:**
>
> When moving to the Approvals subcomponent from another subcomponent, such as Revenue, a Filter popup may display.
>
> This feature allows an end user to submit, review, approve, or reject a planning unit. When users come to this feature, planning units are listed for the scenario and version that were most recently used by them while entering data into forms. If no scenario and version were most recently used, a `Filter` popup displays that allows users to select the scenario and the version. The user can select the scenario and version member for which they want to see planning units.

Using Screen Reader Mode

- In rule launch windows, select the corresponding buttons to invoke the member selector for runtime prompts.
- If, after you perform validations, cells contain errors, you must tab through each cell to locate those with errors. Clicking error messages in the `Data Validation Summary` does not place focus on the corresponding cell with errors.
- If you launch a secondary dialog box such as the member selector while in screen reader mode, in the simplified interface you must exit the dialog box by pressing the `Esc` key or other control button. In the standard interface, press `Alt+Z` to switch focus from the main dialog box to the secondary dialog box. You can then tab to navigate the dialog box.
- Use buttons, radio buttons, and check boxes for selection.
- For information icons, click icons for additional information.
- Popups appear in a new page. When a popup such as a confirmation message appears on save or rule launch, use the `Down Arrow` keys to read the message after the screen reader announces the popup. Use the same process for informational popups.
- Graphs and charts do not display; everything is rendered in table format. Use `Ctrl` and `Alt`, with the arrow keys to read the content of such tables.
- Turn `PC Cursor Mode` on when tabbing through read-only fields in a table. Turn `PC Cursor Mode` off when entering data in editable fields.
- Use `Ctrl` and `Alt` with the arrow keys to read the contents of both read-only and editable tables, such as user variables, across all applications.

- When creating dashboards in screen reader mode, the links displayed in the left pane are not available for creating content in widgets. Instead, you can use the `Chart`, `URL`, and `Commentary` links within the widget to create content.
- To read the content of a text area, select all text inside the text area by pressing `Ctrl+A`.
- When the screen reader is on, to close any open dialog boxes, press `Escape` twice.
- To exit a popup when the screen reader is on, press the Escape key. To exit informational messages when the screen reader is on, press `Tab`.

> **Note:**
>
> In the left pane tree table, select the radio button adjacent to the items that are to be invoked, such as forms.

C

Updating Workforce Artifacts to Use New Features

Overview

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

- If you haven't modified these artifacts (described below), the artifacts and features are available to you automatically with the content update.
- Because customized artifacts aren't updated during a content update, if you have modified 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 re-apply 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. Re-implement 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.

Release 18.09

The following information describes new and modified artifacts related to the performance enhancements in Release 18.09.

Table C-1 18.09 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
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

Release 18.07

The following information describes new and modified artifacts in Release 18.07.

Table C-2 18.07 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

18.07 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

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
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
Forms	• OWP_Rate Table • OWP_Rate Table - Simple • OWP_Rate Table - Threshold	NA	NA
Menus	NA	OWP_Copy Rates	NA

Artifact Type	Modified Artifacts	New Artifacts	Obsolete Artifacts
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