How to create a work schedule in Oracle Fusion

This guide shows you how to create a work schedule in Oracle Fusion, from the supporting setup to the employee assignment. You first create a calendar event category, a calendar event, work shifts, and a workday pattern. Then you build the work schedule, assign it to a department, and assign it to an employee with schedule exceptions.

Prerequisites

Before you begin, make sure you can:

- Open the Oracle application and reach the **Setup and Maintenance** screen.
- Open **Person Management** from the Navigator menu under **Workforce Management**. You need it for the final employee assignment.

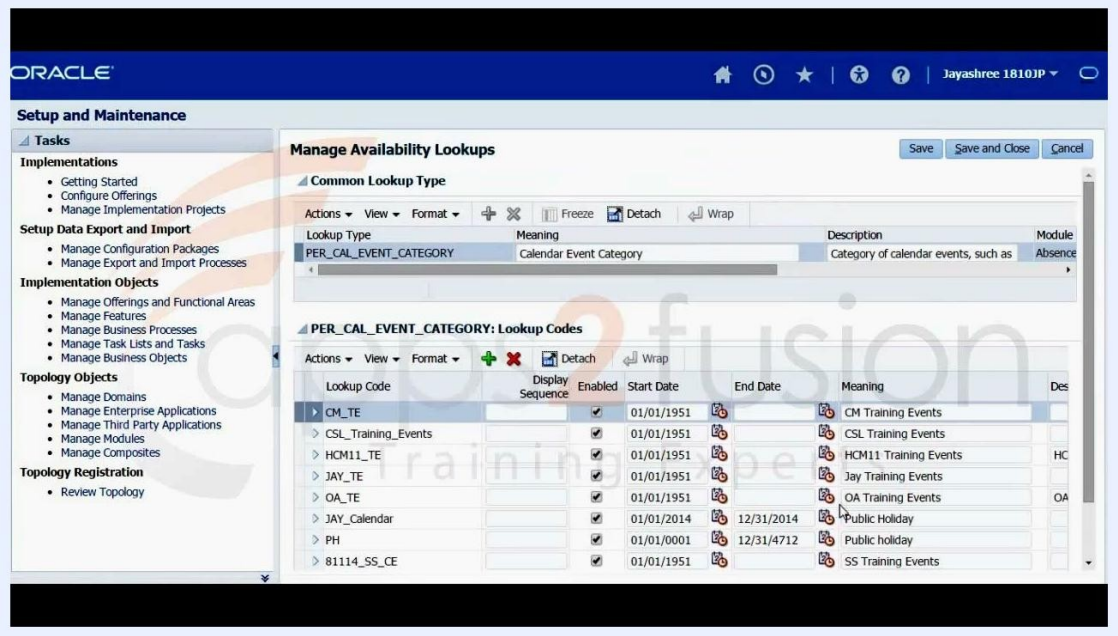
Open Setup and Maintenance

1. Open the Setup and Maintenance screen

Open the Oracle application and go to the **Setup and Maintenance** screen.

- The left panel lists task categories such as Implementations, Setup Data Export and Import, Implementation Objects, and Topology Objects.
- The main panel shows the **Overview** tab with options for Implementation Projects, Assigned Implementation Tasks, All Tasks, and Applications Administration.
- Use the **Search** section to look up "Task Lists and Tasks" by name or business object.

- The **Search Results** section shows the matching business objects.



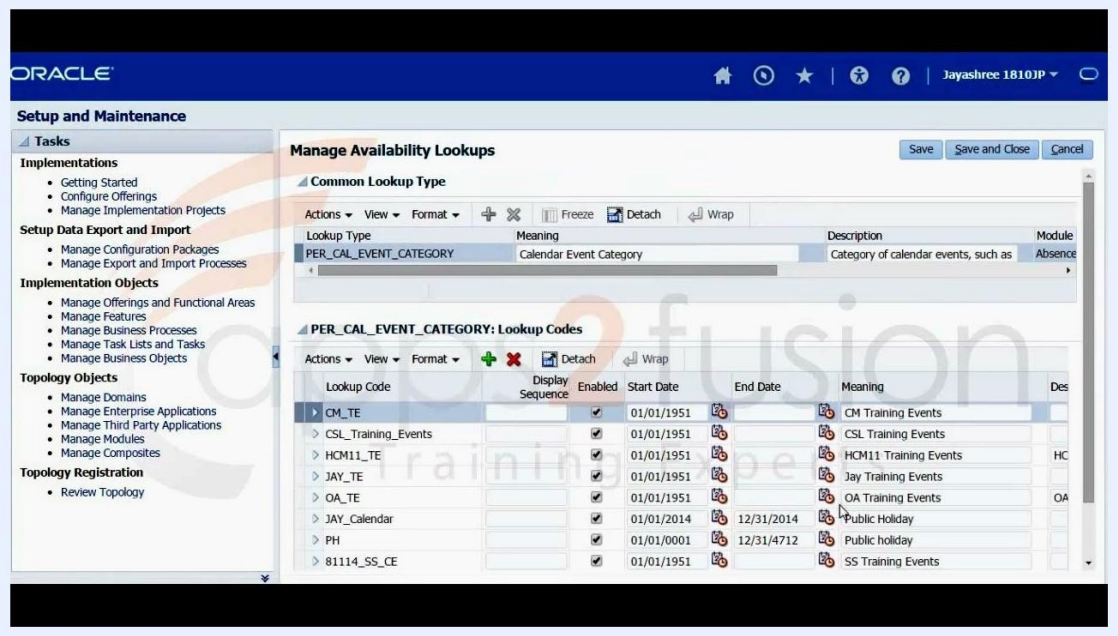
Oracle Setup and Maintenance screen with task categories and the search panel

Add a calendar event category

2. Open Manage Availability Lookups

Navigate to **Manage Availability Lookups**. Make sure **Common Lookup Type** is set to PER_CAL_EVENT_CATEGORY. This lookup type is used for the Calendar Event Category.

The table lists the existing lookup codes with their enabled status, start and end dates, and meanings, such as CM Training Events and Public Holiday.



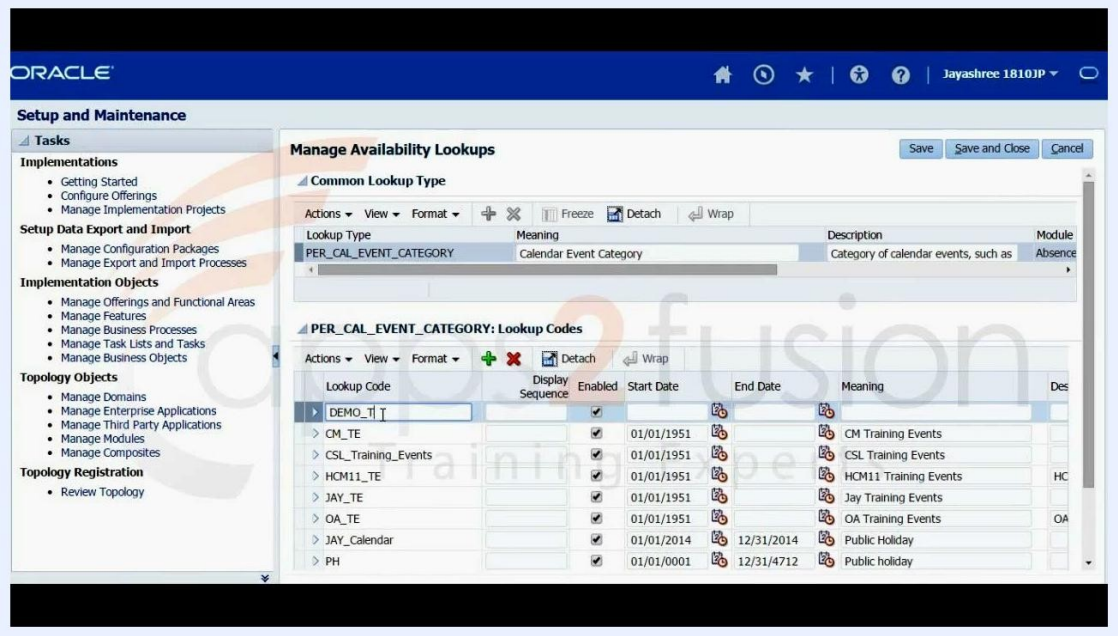
Manage Availability Lookups screen showing PER_CAL_EVENT_CATEGORY and the existing lookup codes

3. Add the new category row

Click the green plus (+) icon to add a new row to the lookup codes table. Enter these details for the new event category:

- **Lookup Code:** DEMO_TE
- **Enabled:** Checked
- **Start Date:** 01/01/1951

- **Meaning:** Demo Training Events



New lookup code DEMO_TE with the start date and meaning fields being edited

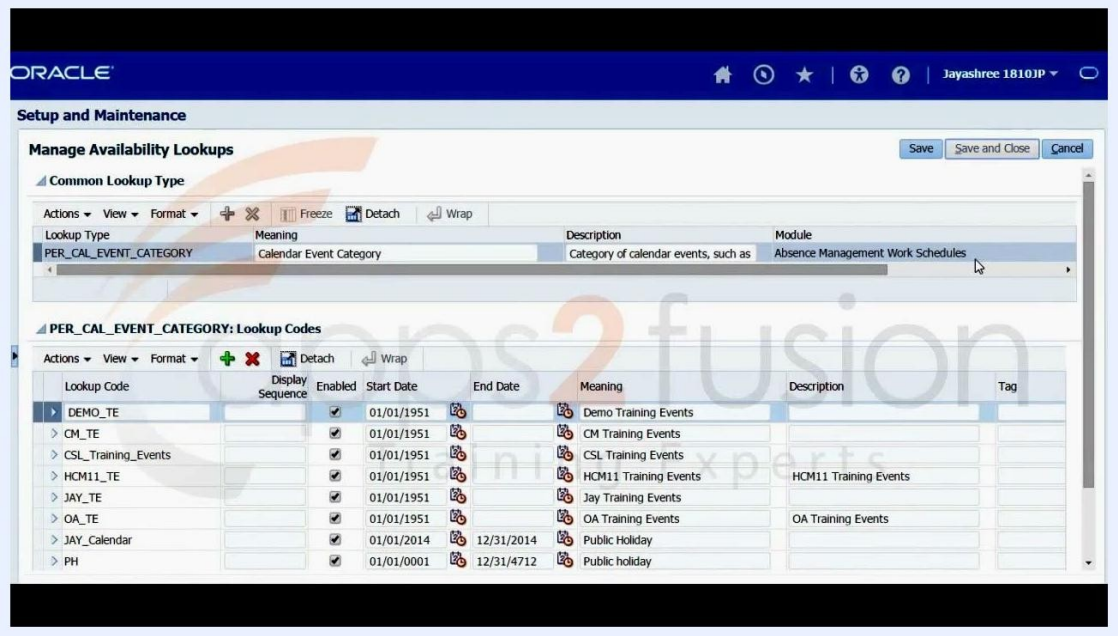
Create a calendar event

4. Find the Manage Calendar Events task

On the **Setup and Maintenance** screen, stay on the **Overview** tab and use the search panel.

1. Set **Search** to "Task Lists and Tasks".
2. In the **Name** field, enter Manage Calendar Events.
3. In the **Business Object** field, enter Manage Calendar Events.
4. Click **Search**.
5. In **Search Results**, find the row with **Name** "Manage Calendar Events" and **Business Objects** "Calendar Event".

6. Click the **Go to Task** icon in that row.



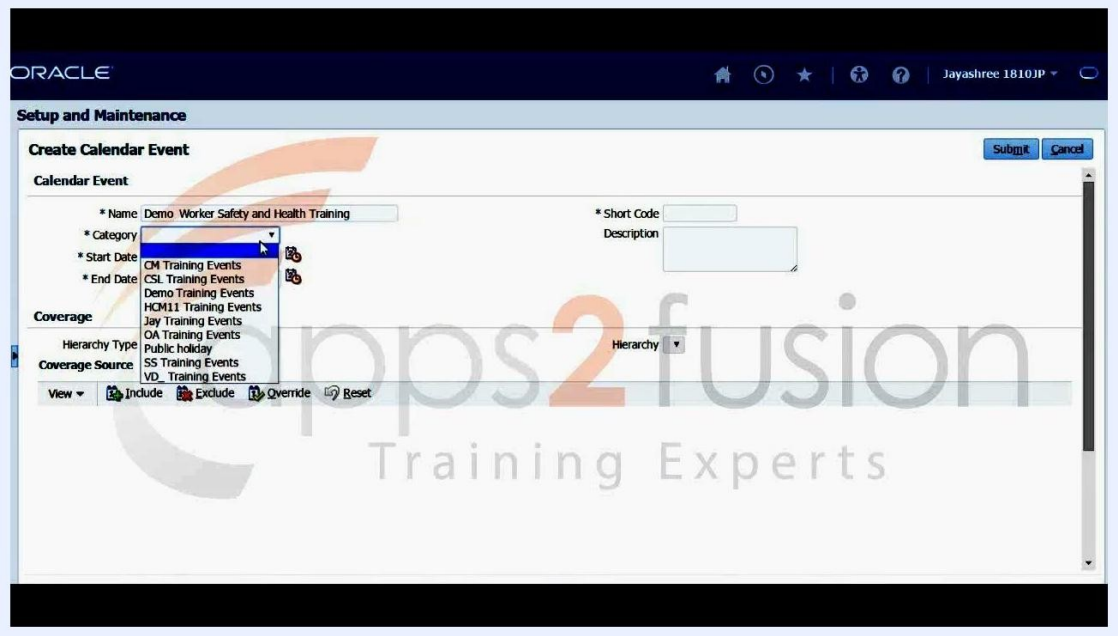
Setup and Maintenance Overview with the Manage Calendar Events search and the Go to Task icon highlighted

5. Start the new calendar event

On the **Create Calendar Event** screen, find the **Calendar Event** section.

- In the **Name** field, enter Demo Worker Safety and Health Training.
- Leave the **Short Code** field blank for now.

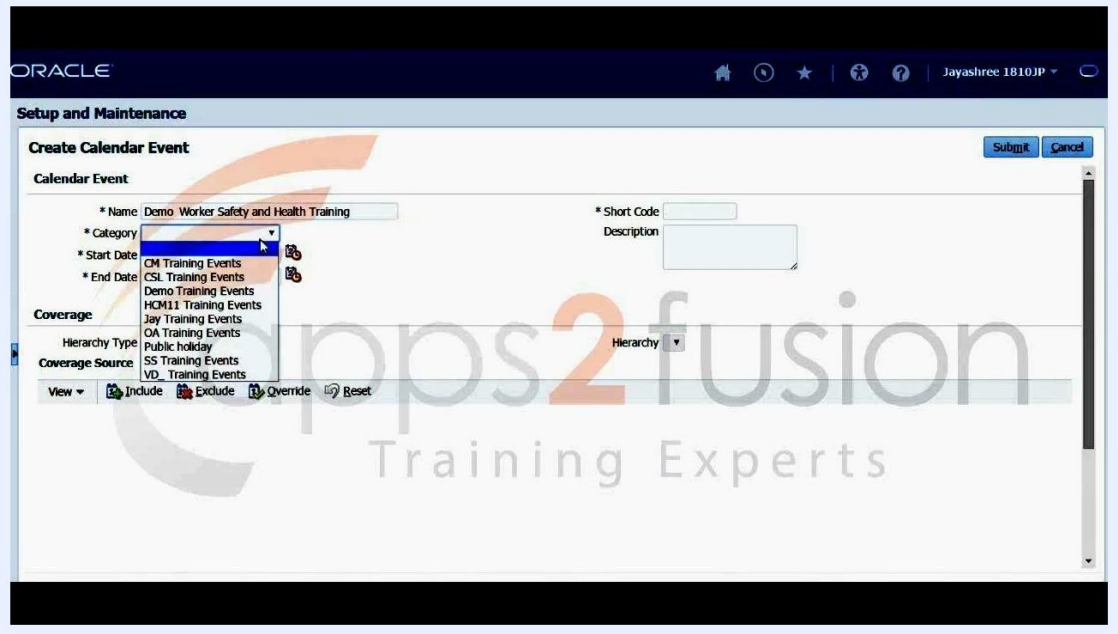
- Click the **Category** dropdown to expand the list of categories.



Create Calendar Event screen with the Name field being filled and the Category dropdown being accessed

6. Select the event category

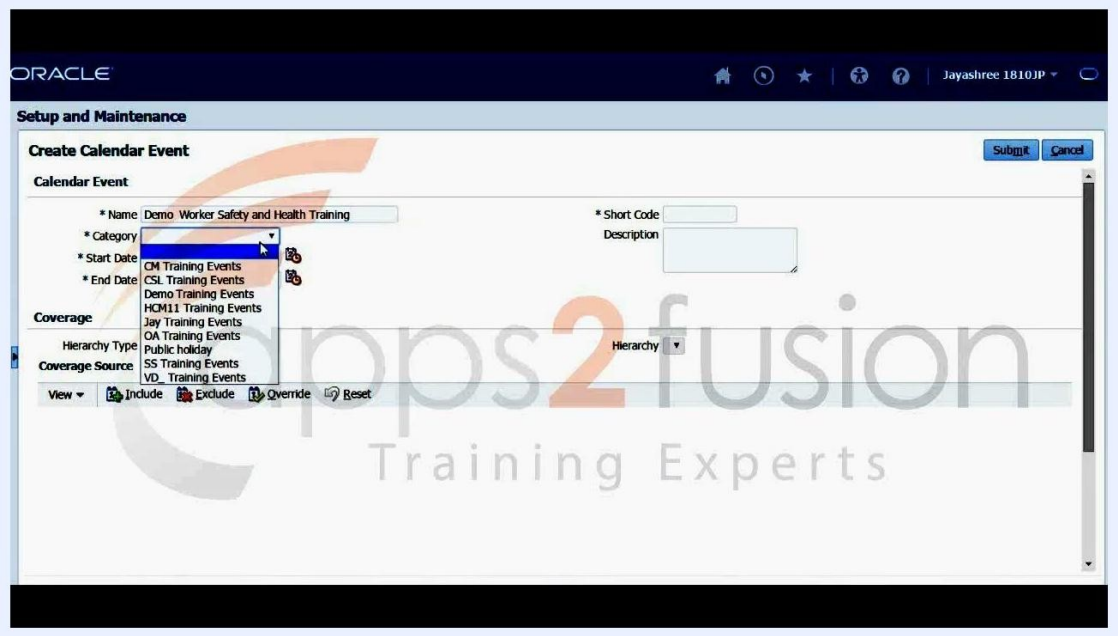
From the **Category** dropdown, select Demo Training Events.



Create Calendar Event screen with the Category dropdown open, showing Demo Training Events, CM Training Events, and other options

7. Set the event start date

1. Click the calendar icon next to the **Start Date** field.
2. In the date picker, select **May 14, 2015**.
3. Set the time to **12:00**.
4. Click **OK** to confirm the date and time.



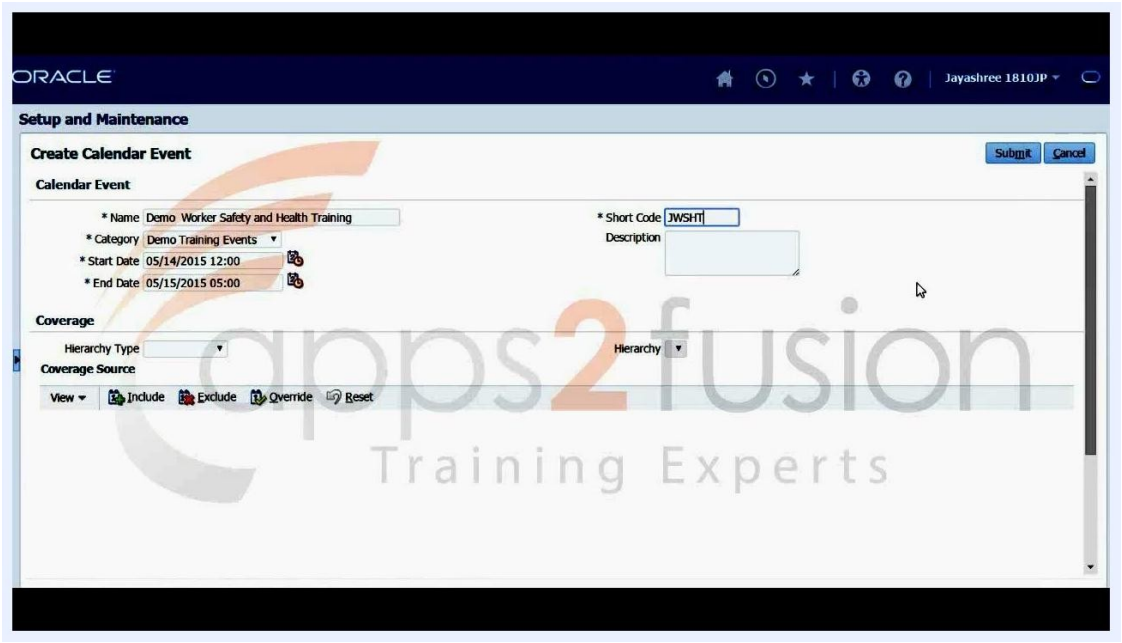
Start Date picker showing the May 2015 calendar and time fields

8. Set the event end date

Click the calendar icon next to the **End Date** field. Enter 05/15/2015 05:00 as the end date and time.

9. Enter the short code

In the **Short Code** field, type JWSHT.



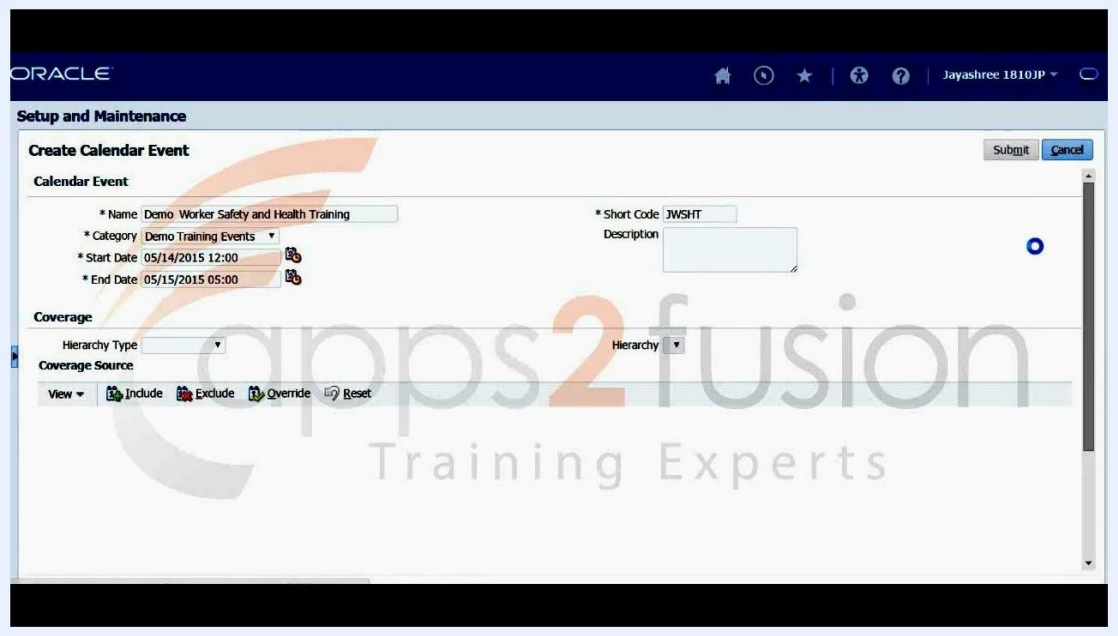
Create Calendar Event screen with Name, Category, Start Date, End Date, and Short Code filled in

10. Review the event details

Make sure these fields are complete:

- **Name:** Demo Worker Safety and Health Training
- **Category:** Demo Training Events
- **Start Date:** 05/14/2015 12:00
- **End Date:** 05/15/2015 05:00
- **Short Code:** JWSHT

Leave the **Description**, **Hierarchy Type**, and **Coverage Source** fields blank or at their default values unless you are told otherwise.



Create Calendar Event screen with all required fields filled in and ready to submit

At this point you have found the Manage Calendar Events task and filled in the new calendar event. The next sections cover the work shifts, and later sections cover the remaining scheduling configuration.

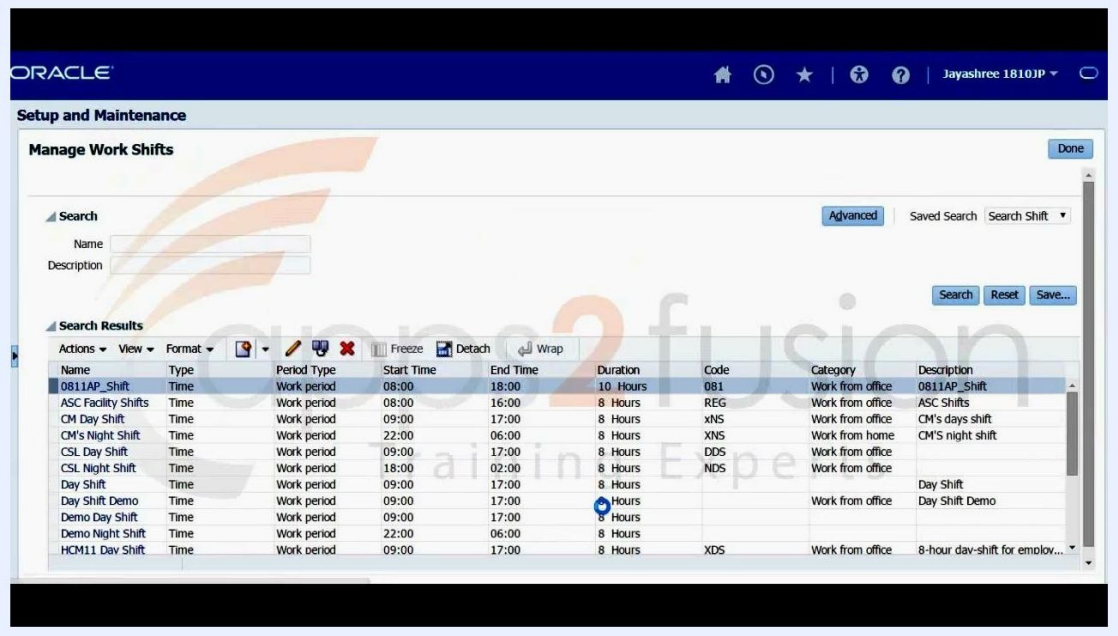
Create work shifts

11. Find the Manage Work Shifts task

On the **Setup and Maintenance** screen, stay on the **Overview** tab.

1. Set **Search** to "Task Lists and Tasks".
2. In the **Name** field, enter Manage Work Shifts.
3. Leave the **Business Object** field blank.
4. Click **Search**.
5. In **Search Results**, find the row with **Name** "Manage Work Shifts" and **Business Objects** "Shift".

6. Click the **Go to Task** icon in that row.



Setup and Maintenance Overview with the Manage Work Shifts search and the Go to Task icon highlighted

12. Review the existing work shifts

On the **Manage Work Shifts** screen, review the existing shifts in the **Search Results** table. The columns are **Name**, **Type**, **Period Type**, **Start Time**, **End Time**, **Duration**, **Code**, **Category**, and **Description**.

Example entries:

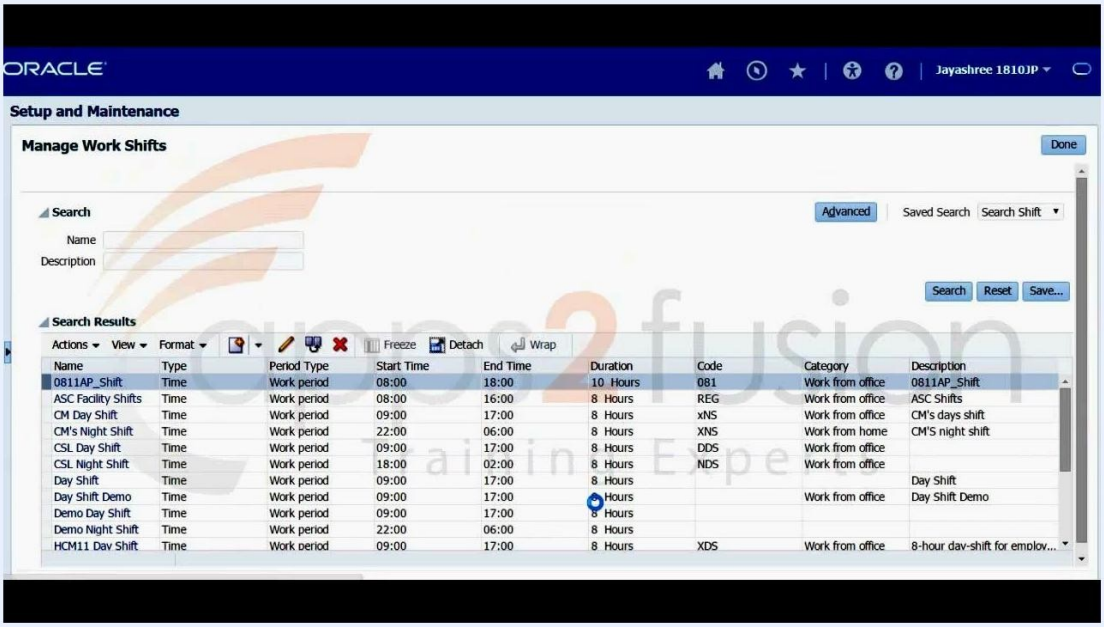
- 0811AP_Shift: Start Time 08:00, End Time 18:00, Duration 10 Hours, Category Work from office
- CM Day Shift: Start Time 09:00, End Time 17:00, Duration 8 Hours, Category Work from office

13. Start a new day shift

Click the **Create** (plus) icon above the search results table. The **Create Time Shift** dialog opens.

- In the **Name** field, enter Demo DayShift.

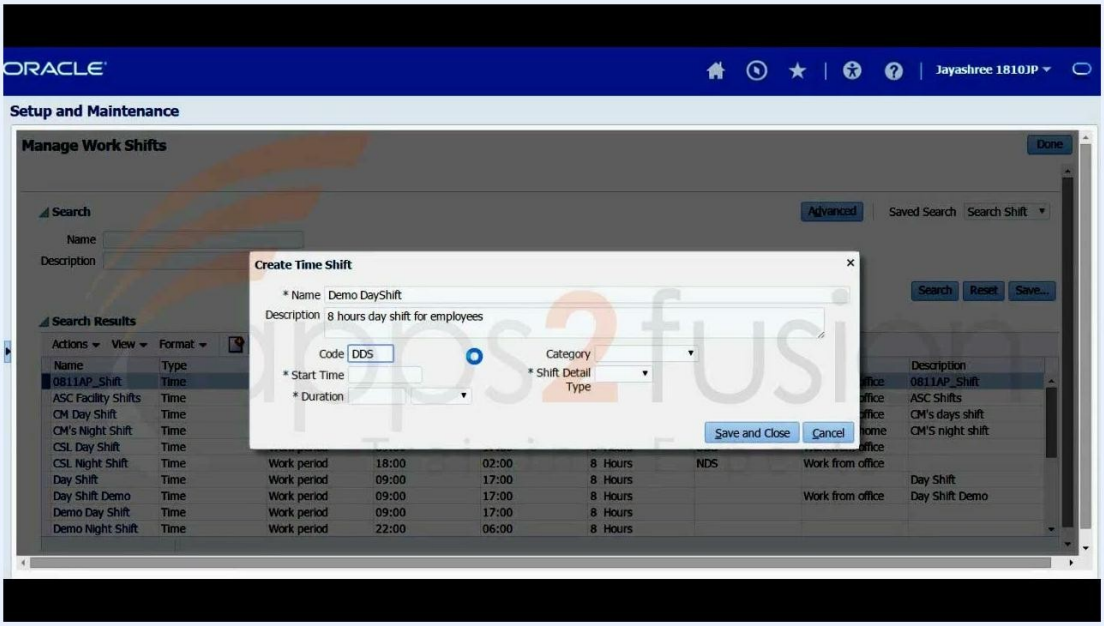
- In the **Description** field, enter 8 hours day shift for employees.



Create Time Shift dialog with the Name and Description fields being filled

14. Enter the day shift code

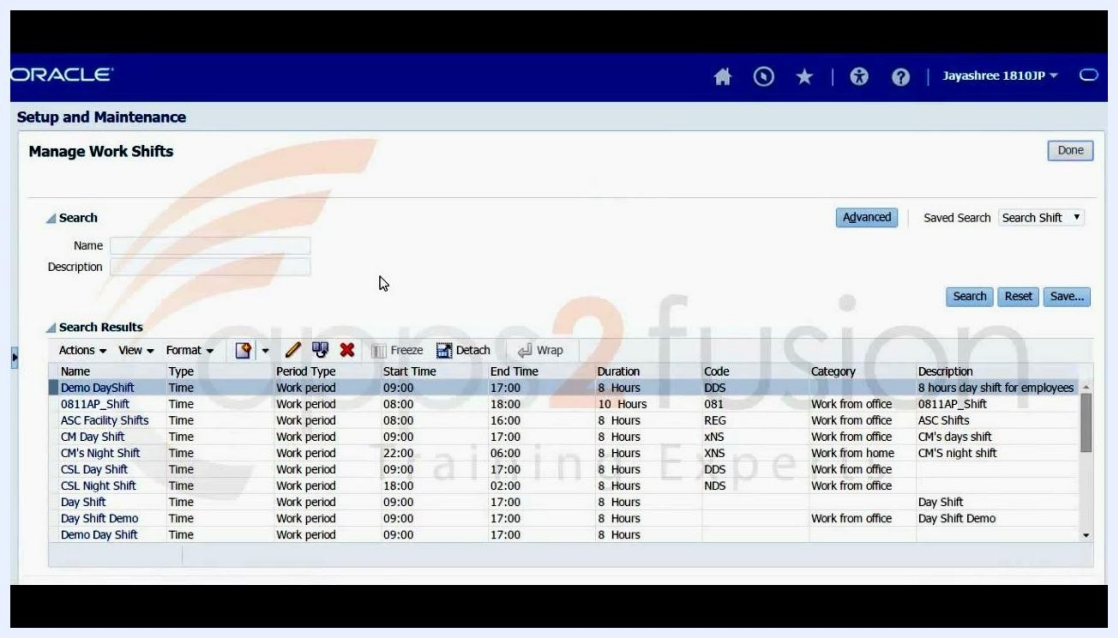
In the **Code** field, enter DDS.



Create Time Shift dialog with the Code field set to DDS

15. Select the day shift category

In the **Category** dropdown, select Work from office or Work from home, as appropriate. This example uses Work from office.

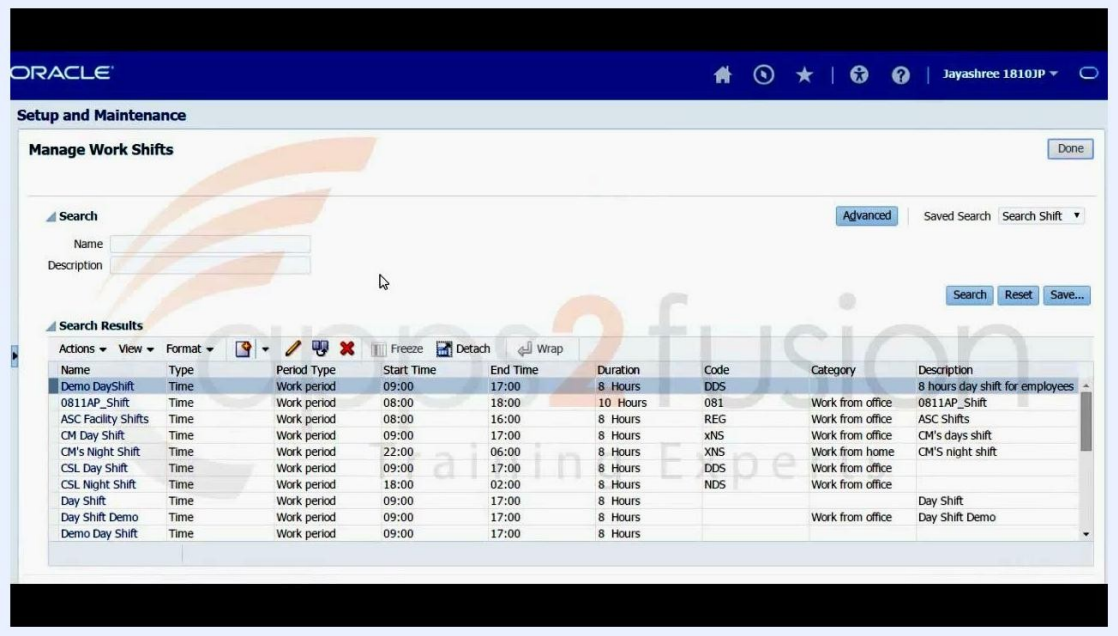


Create Time Shift dialog with the Category dropdown open, showing Work from home and Work from office

16. Set the day shift start time and duration

- In the **Start Time** field, enter 09:00.
- In the **Duration** field, enter 8.

- In the duration unit dropdown, select Hours.



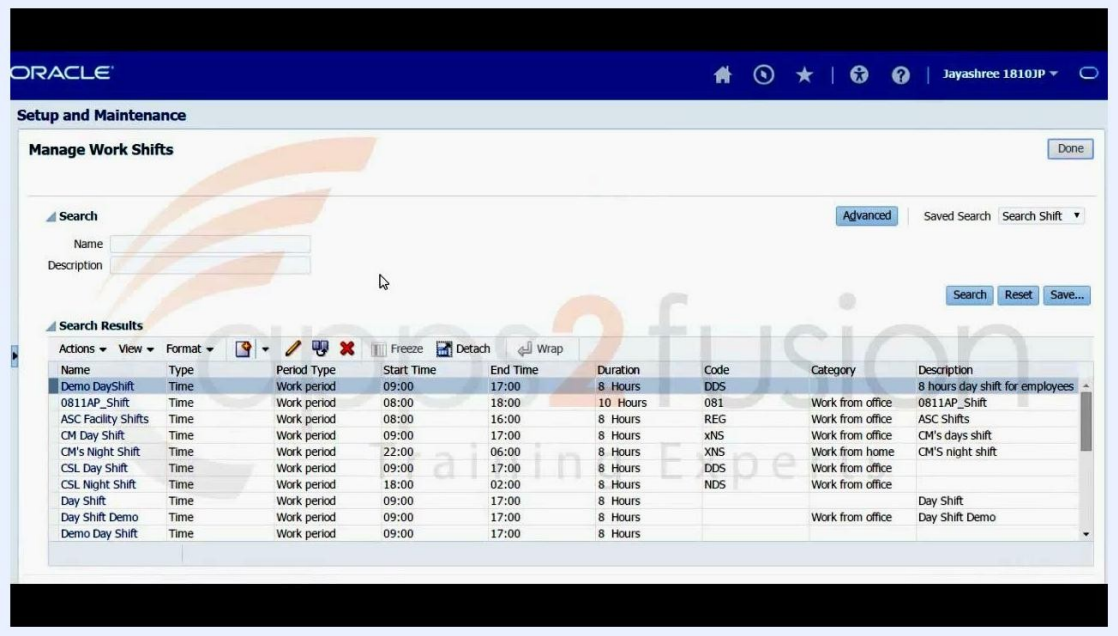
Create Time Shift dialog with Start Time 09:00, Duration 8, and the unit dropdown open

17. Save the day shift and verify it

Click **Save and Close** to add the new shift to the list. Confirm that Demo DayShift appears in the **Search Results** table with these details:

- **Name:** Demo DayShift
- **Type:** Time
- **Period Type:** Work period
- **Start Time:** 09:00
- **End Time:** 17:00
- **Duration:** 8 Hours
- **Code:** DDS
- **Category:** Work from office

- **Description:** 8 hours day shift for employees



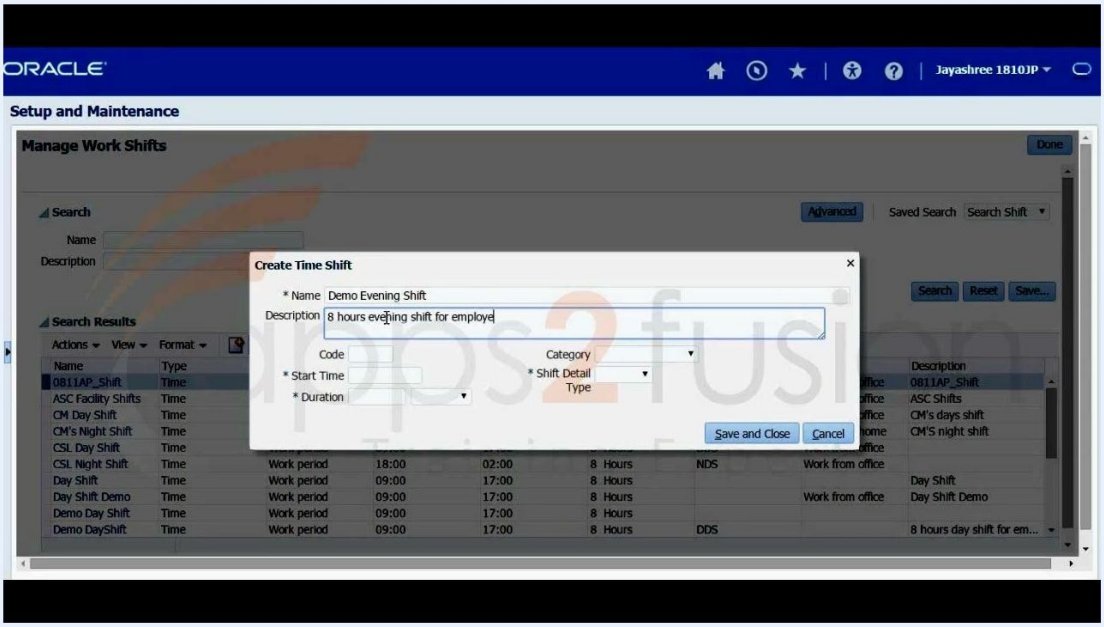
Manage Work Shifts screen showing Demo DayShift added to the list with all details

18. Start an evening shift

Click the option to create a new time shift. The **Create Time Shift** dialog appears. Enter these details:

- **Name:** Demo Evening Shift

- **Description:** 8 hours evening shift for employees



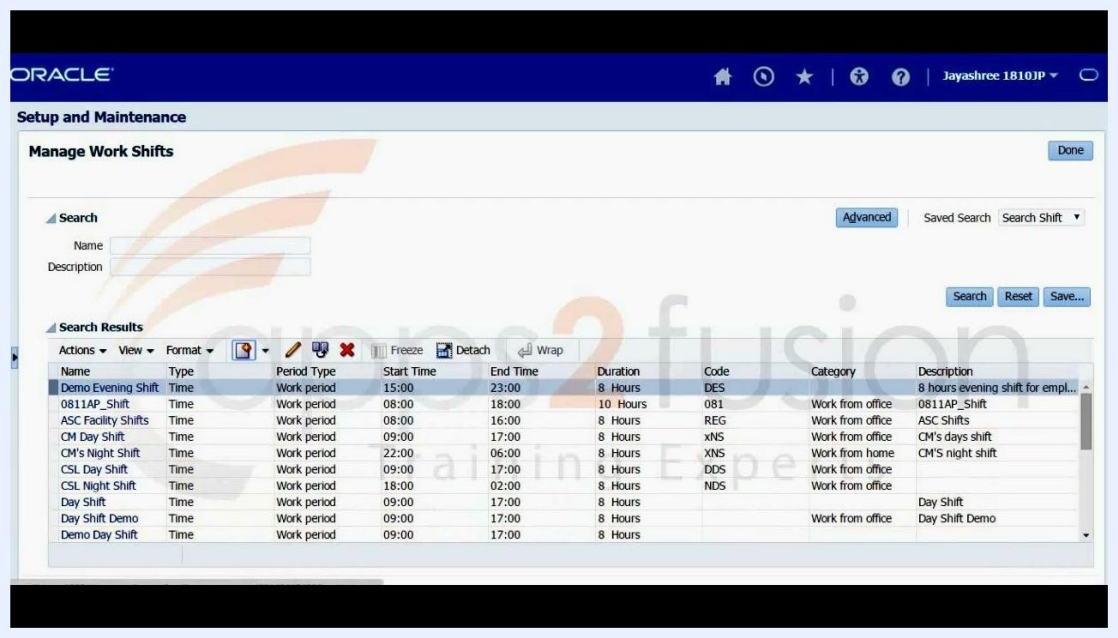
Create Time Shift dialog with the Name and Description fields filled in

19. Enter the evening shift code

In the **Code** field, enter DES.

20. Select the evening shift category

Click the dropdown next to **Category**. Choose Work from home or Work from office, as appropriate.



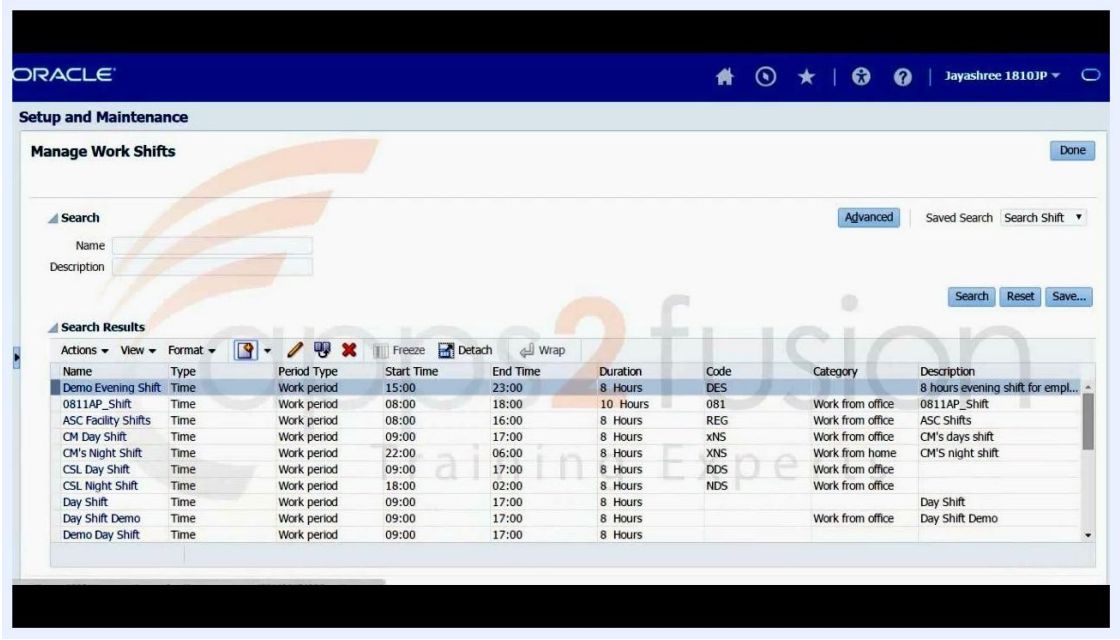
Category dropdown open with the Work from home and Work from office options

21. Set the evening shift start time

In the **Start Time** field, enter 15:00.

22. Select the shift detail type

Click the dropdown next to **Shift Detail Type**. Choose from Flexible, None, or Punch.



Shift Detail Type dropdown open with the Flexible, None, and Punch options

23. Enter the evening shift duration

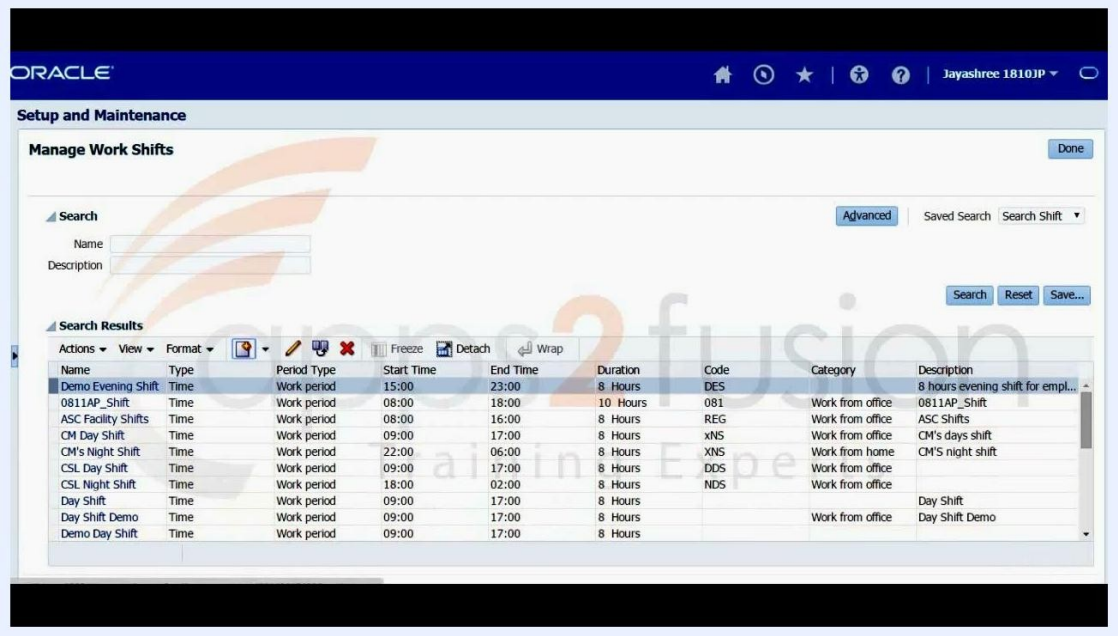
In the **Duration** field, enter 8 Hours.

24. Save the evening shift and verify it

Click **Save and Close** to create the new time shift. Verify that the shift appears in the **Search Results** table with these details:

- **Name:** Demo Evening Shift
- **Period Type:** Work period
- **Start Time:** 15:00
- **End Time:** 23:00
- **Duration:** 8 Hours
- **Code:** DES
- **Category:** Work from office (or as selected)

- **Description:** 8 hours evening shift for employees



Demo Evening Shift in the list of work shifts with all details

Create a workday pattern

25. Open Manage Work Workday Patterns

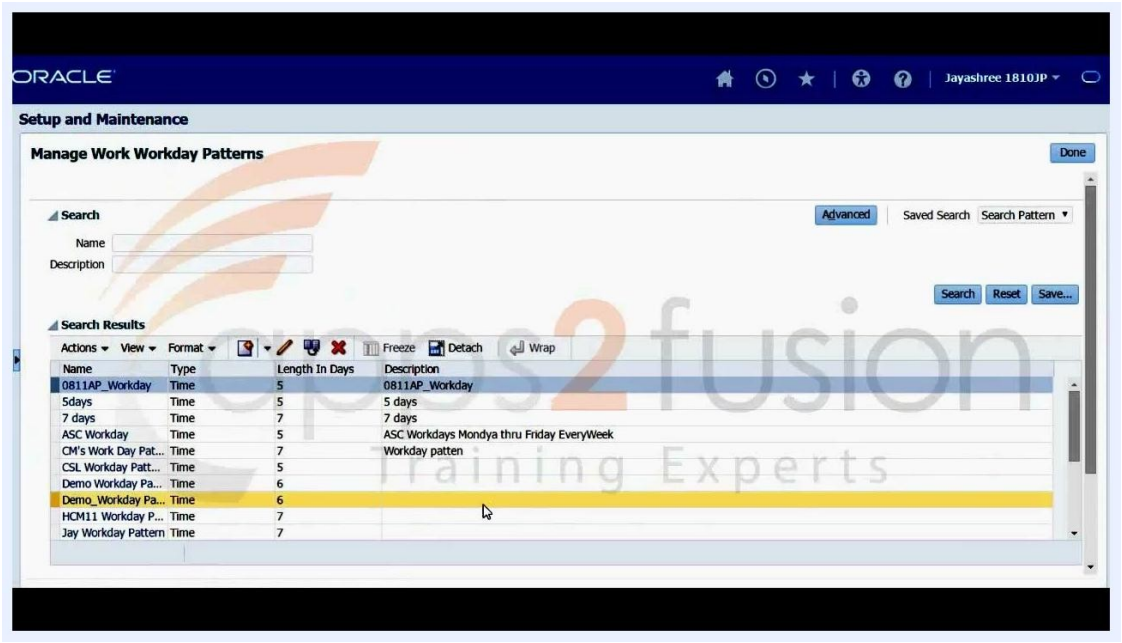
Navigate to the **Manage Work Workday Patterns** section.

26. Start a new workday pattern

Click the option to create a new workday pattern. The **Create Time Workday Pattern** dialog appears.

27. Enter the pattern name

In the dialog, in the **Name** field, enter Demo Workday Pattern.



Create Time Workday Pattern dialog with the Name field being filled

28. Enter the pattern description

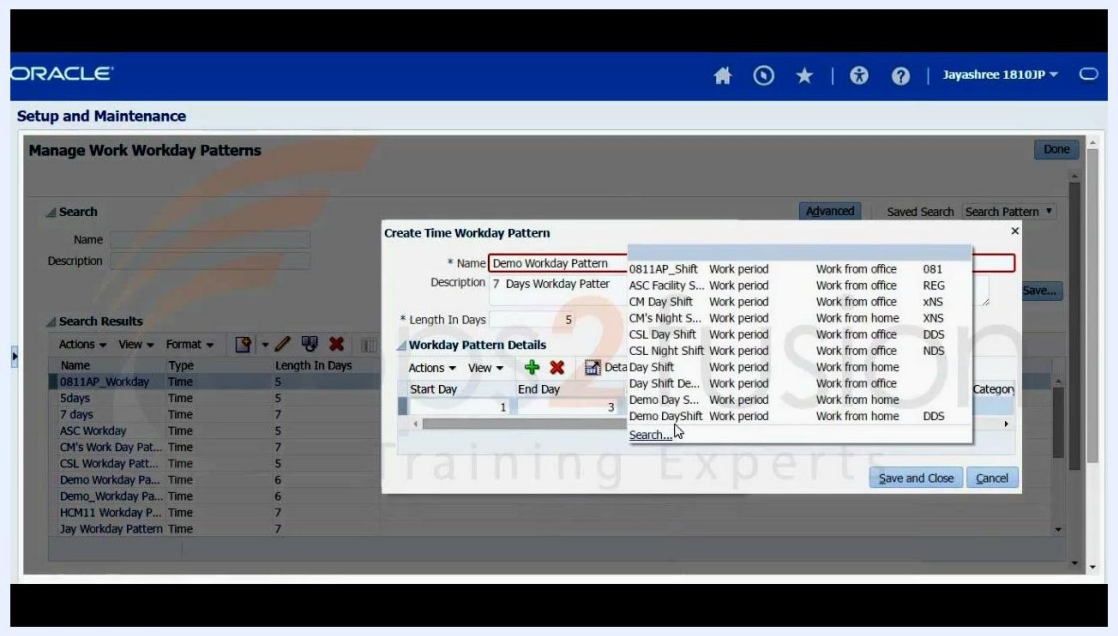
In the **Description** field, enter 7 Days Workday Pattern.

29. Review the pattern details

Review the details you entered:

- **Name:** Demo Workday Pattern
- **Description:** 7 Days Workday Pattern
- **Length in Days:** 5

The **Length in Days** value is set to 5, not 7. The **Workday Pattern Details** section is empty at this stage.

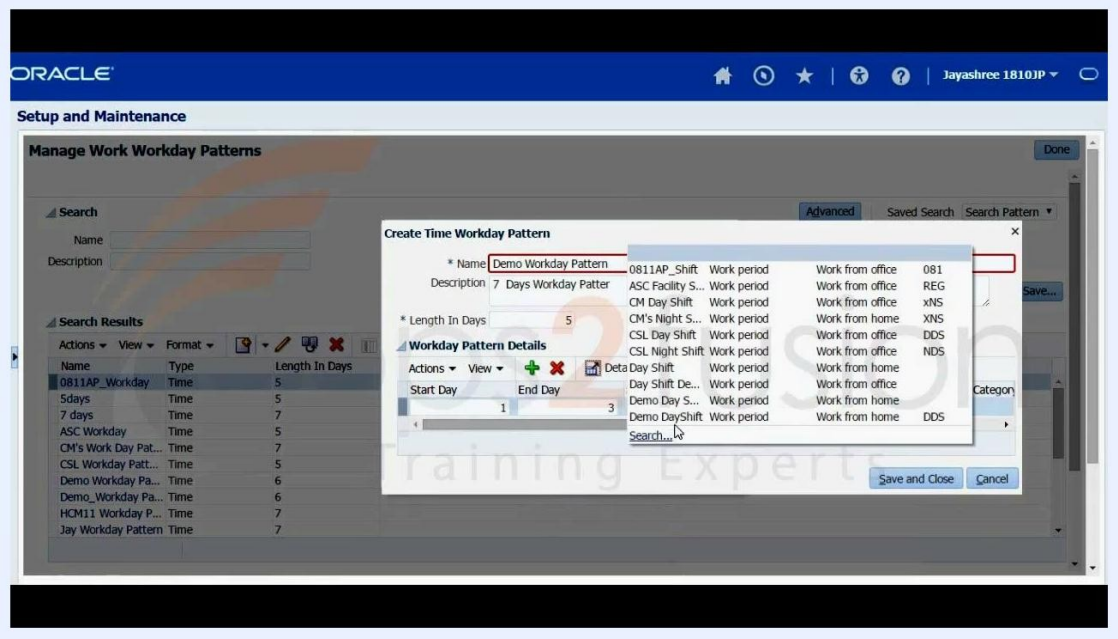


Create Time Workday Pattern dialog with Name, Description, and Length in Days filled and Workday Pattern Details empty

30. Add the first workday pattern detail

1. Click the green plus icon (+) under **Workday Pattern Details**. A new row appears with editable fields for Start Day, End Day, and Shift Name.
2. Enter **Start Day** 1 and **End Day** 3.

3. Click the dropdown in the **Shift Name** column. A list of available shifts appears, with columns for Shift Name, Shift Period Type, Shift Category, and Code.



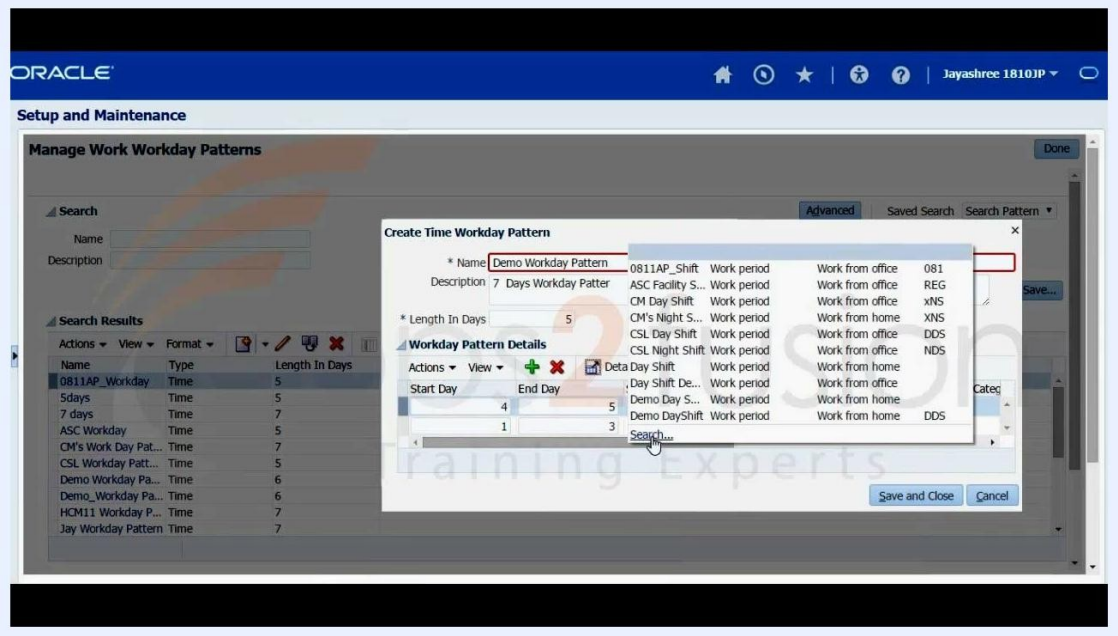
Shift Name dropdown open, showing the available shifts

31. Select the day shift

From the dropdown, choose Demo DayShift (Work period, Work from home, DDS). The row now shows:

- **Start Day:** 1
- **End Day:** 3
- **Shift Name:** Demo DayShift
- **Shift Type:** Time

- **Shift Period Type:** Work period

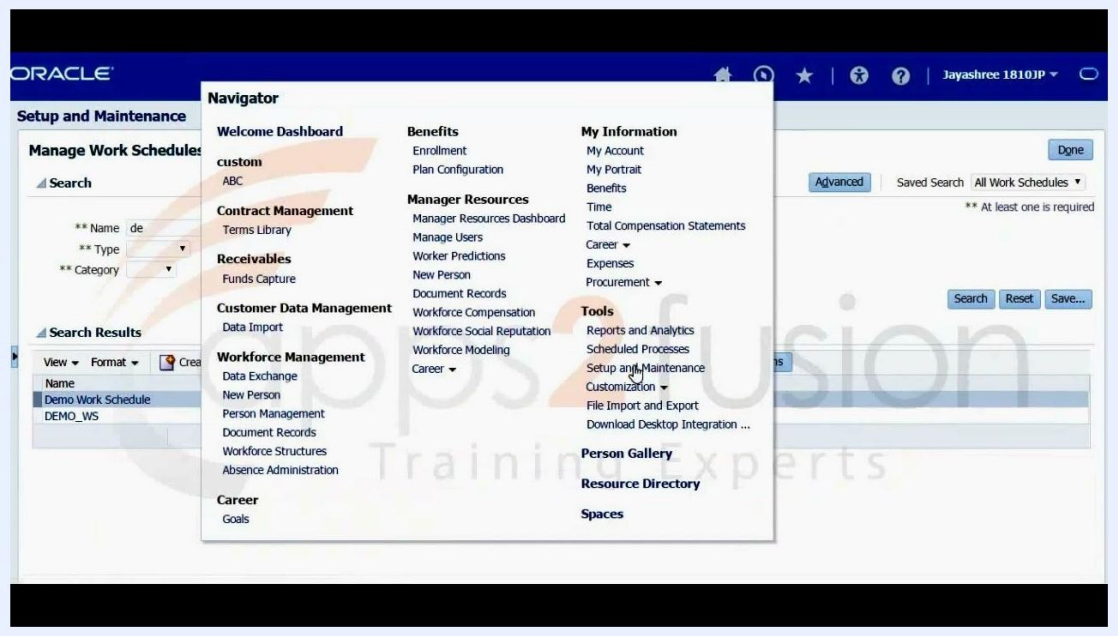


Workday Pattern Details row filled in with Demo DayShift

32. Add the second workday pattern detail

1. Click the green plus icon (+) again to add a second row.
2. Enter **Start Day** 4 and **End Day** 5.
3. Click the dropdown in the **Shift Name** column.
4. If the shift you want is not visible, click **Search...** at the bottom of the dropdown. The **Search and Select: Shift Name** dialog appears.
5. Set **Name** to Starts with Demo, and set **Period Type** to Equals Work period.
6. Click **Search** to display the matching shifts.

7. Select Demo Evening Shift (Work period, Work from home, DES) from the results.



Search and Select: Shift Name dialog with Demo Evening Shift highlighted

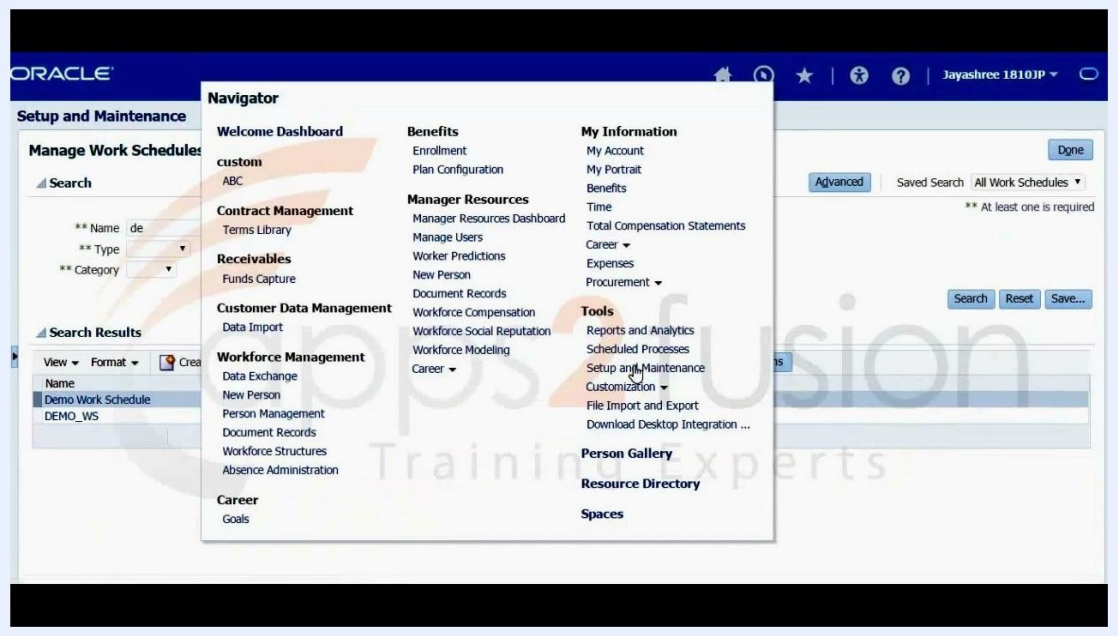
33. Save the workday pattern

Click **Save and Close**. If a record with the same name already exists, this error appears: "A record with the value Demo Workday Pattern already exists. Enter a unique value."

Update the **Name** field to a unique value, such as Demo Workday Pattern test. Make sure both workday pattern details are present:

- Row 1: Start Day 4, End Day 5, Shift Name Demo Evening, Shift Type Time, Shift Period Type Work period

- Row 2: Start Day 1, End Day 3, Shift Name Demo DayShift, Shift Type Time, Shift Period Type Work period



Error message for a duplicate workday pattern name, with the updated details

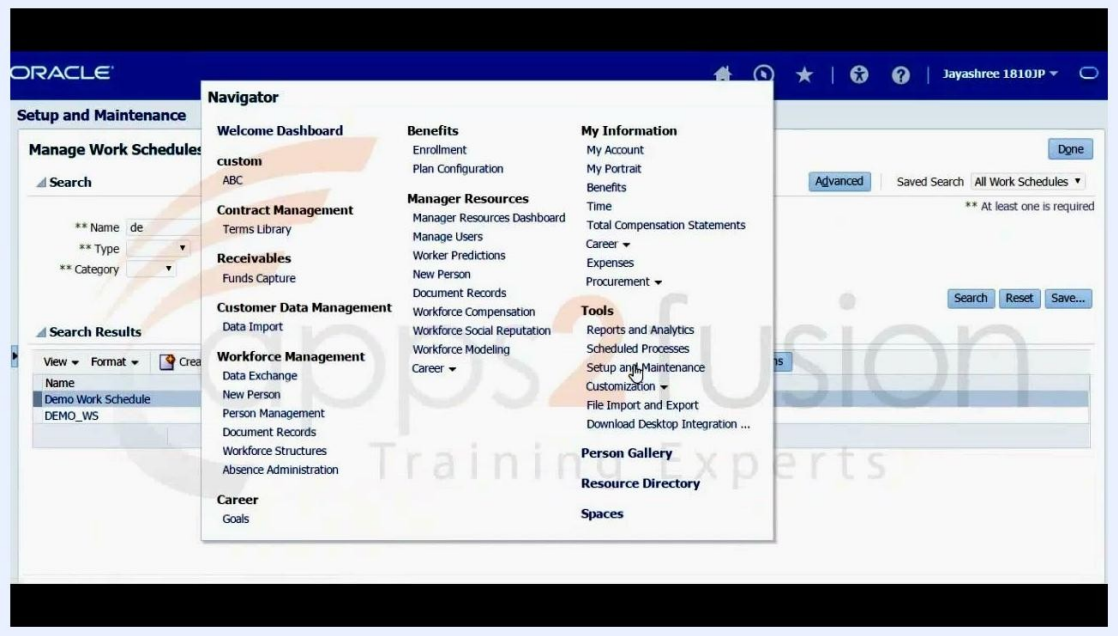
Create the work schedule

34. Open the Navigator menu

Click the Navigator icon in the Oracle interface. The Navigator menu shows sections such as:

- Welcome Dashboard
- Contract Management
- Receivables
- Customer Data Management
- Workforce Management, with options like Data Exchange, New Person, and Person Management
- Tools, including Setup and Maintenance

- Person Gallery, Resource Directory, and Spaces



Navigator menu open with all available modules and options

35. Open Manage Work Schedules

In the Setup and Maintenance module, search for "Manage Work Schedules".

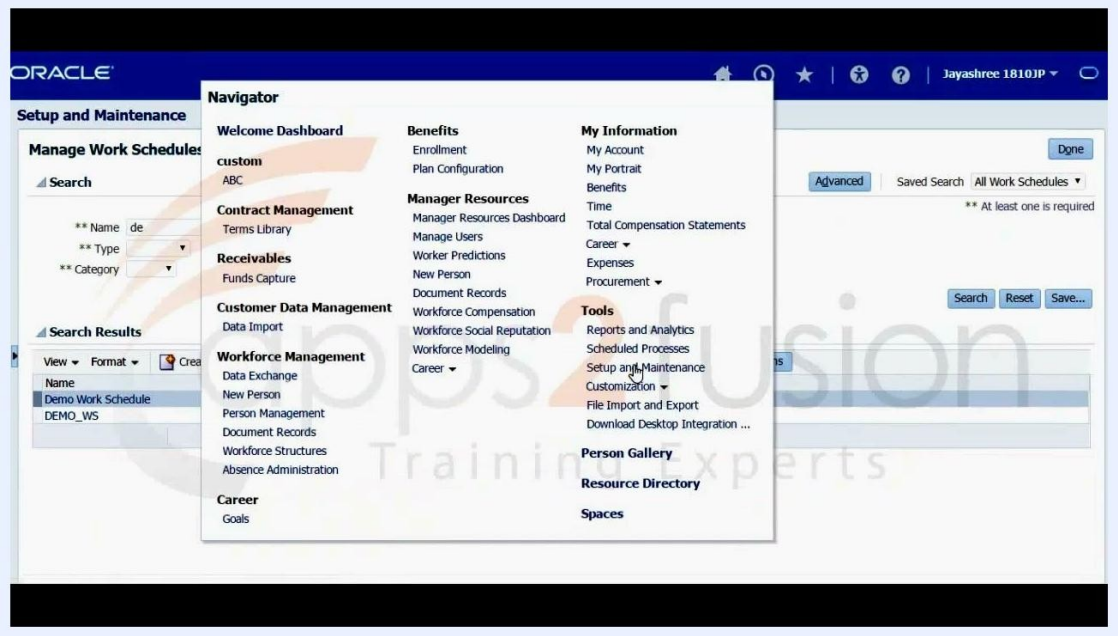
1. On the **Overview** tab, under **All Tasks**, enter Manage Work Schedules in the **Name** field.
2. Click **Search**.
3. In the search results, find the "Manage Work Schedules" task.
4. Click the **Go to Task** icon (a green arrow) to open the task.

36. Enter the work schedule details

On the **Create Work Schedule** screen, enter these details:

- **Name:** Jay Demo Work Schedule
- **Type:** Select Time from the dropdown.
- **Category:** Leave blank or select as appropriate.
- **Description:** Leave blank or enter as needed.
- **Effective from Date:** 04/04/2015
- **Effective to Date:** 04/04/2015

The **Patterns** and **Exceptions** sections are empty for now.

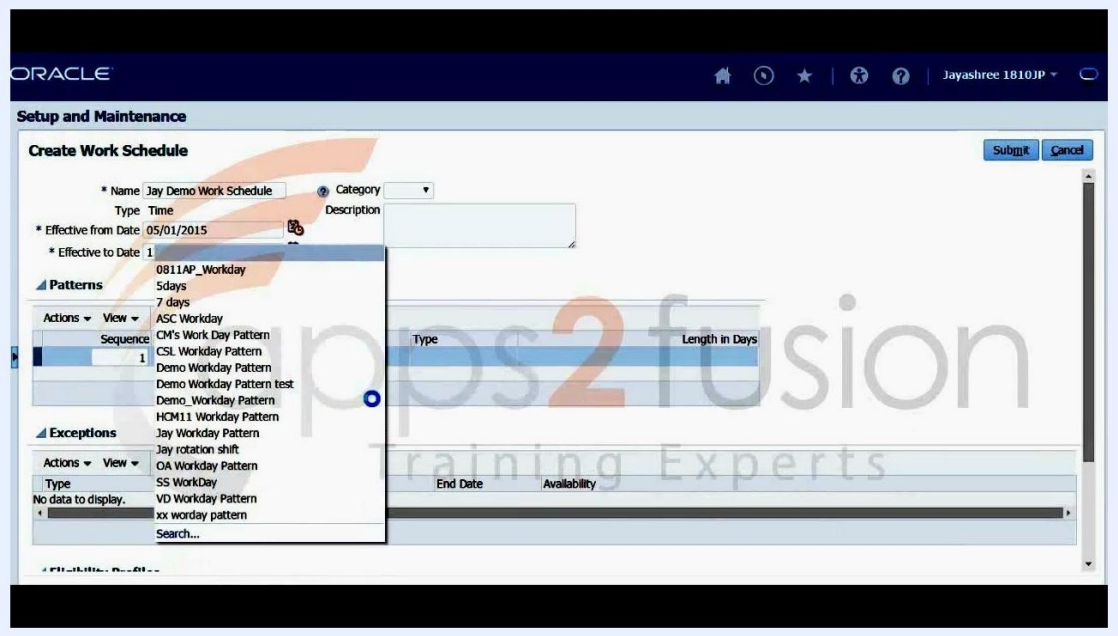


Create Work Schedule screen with the fields being filled

37. Set the effective dates

1. Click the calendar icon next to the **Effective from Date** field.
2. In the calendar popup, select **April 2015** from the dropdown and choose the date you want.
3. Repeat the process for the **Effective to Date** field.

The example in this step shows **Effective from Date** 05/01/2015 and **Effective to Date** 04/04/2015. Later, when you search for the schedule, it appears with effective dates of 05/01/2015 to 12/31/2015.

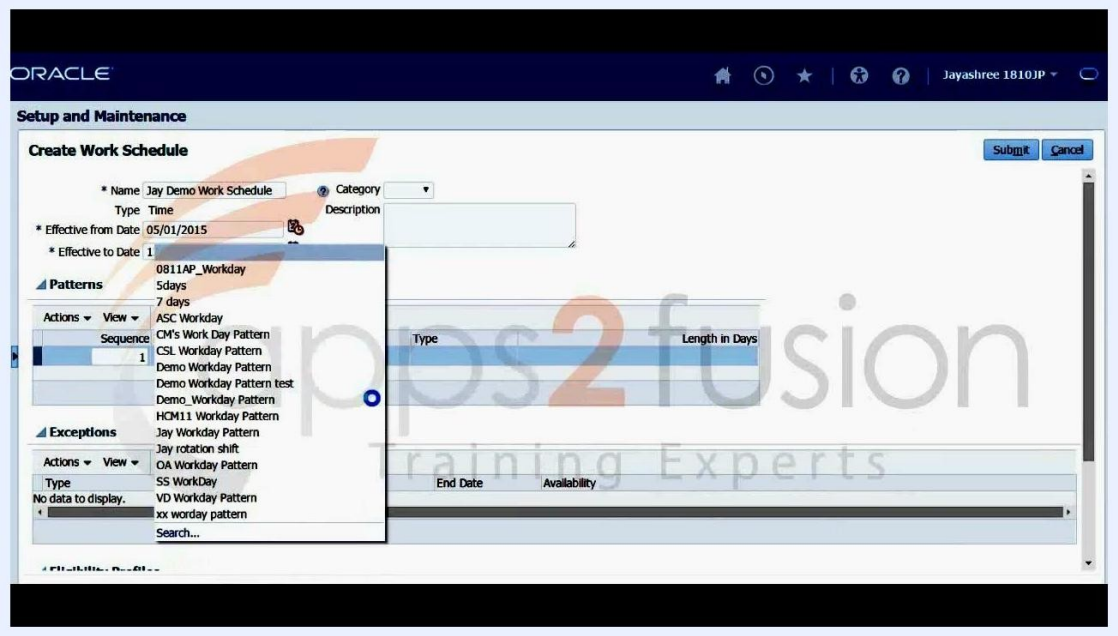


Calendar popup open for selecting the month and year of an effective date

38. Add a pattern to the work schedule

1. In the **Patterns** section, click the green plus icon (+) to add a new row.
2. Enter **Sequence** 1.
3. Click the dropdown in the **Name** column to select a workday pattern.

The **Type** and **Length in Days** columns are available for input. Example format guidance appears for the sequence field.



Patterns section with a new row being added and the sequence field active

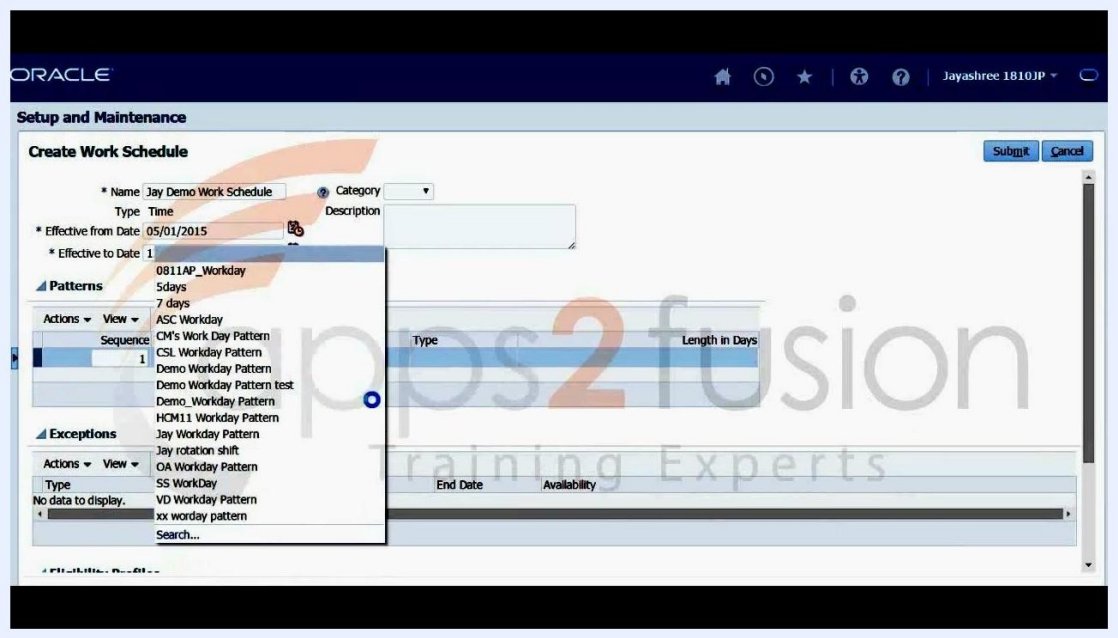
39. Select the workday pattern

In the **Name** dropdown, choose Demo Workday Pattern test from the list of available patterns. The row now shows:

- **Sequence:** 1
- **Name:** Demo Workday Pattern test
- **Type:** Time
- **Length in Days:** 5

40. Submit the work schedule

Click the **Submit** button in the upper right corner of the screen to save the work schedule. The schedule is now created with the selected pattern and effective dates.



Work schedule ready to submit with the Submit button highlighted

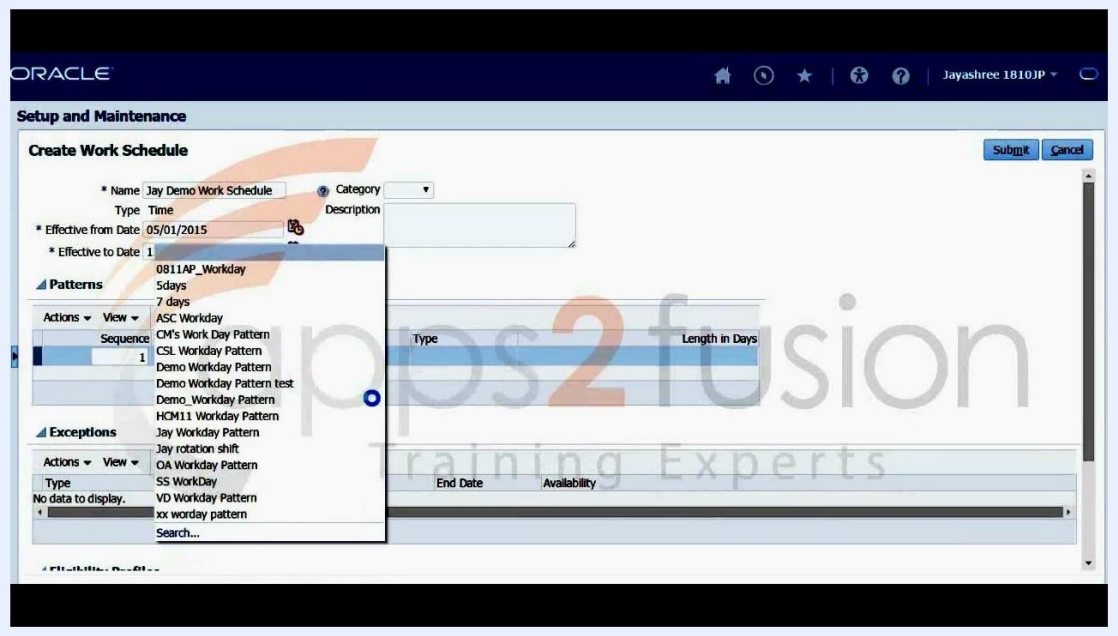
Administer the work schedule assignment

41. Open Manage Work Schedule Assignment Administration

In the Setup and Maintenance module, go to the **Overview** tab.

1. In the **All Tasks** section, search for Manage Work Schedule Assignment.
2. In the search results, find "Manage Work Schedule Assignment Administration".

3. Click the **Go to Task** icon (a green arrow) to open the assignment administration screen.



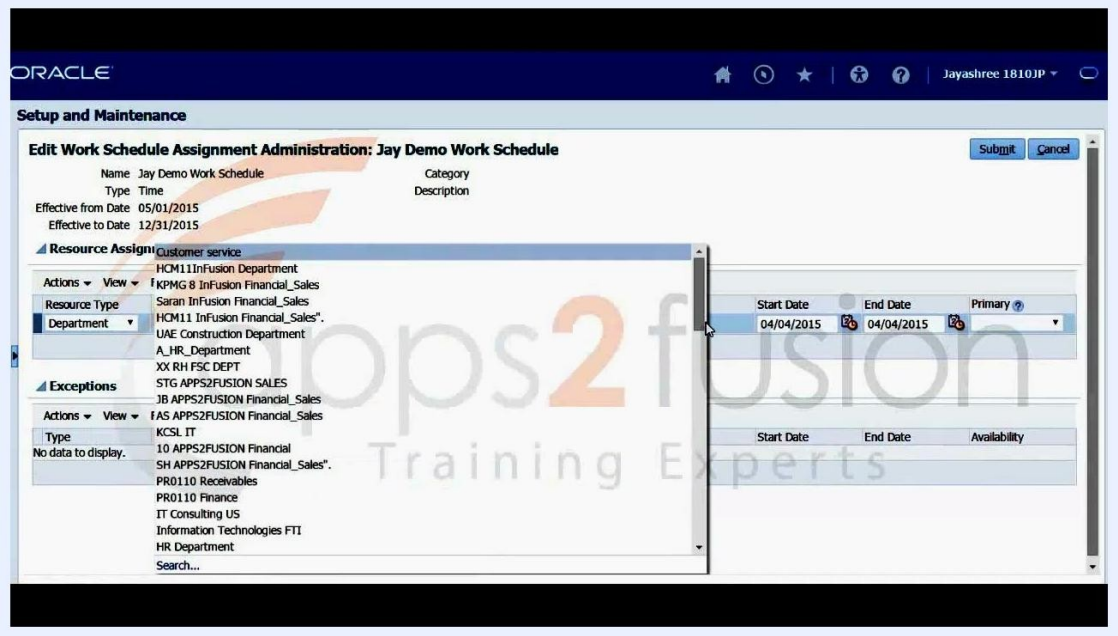
Manage Work Schedule Assignment Administration task selected with the Go to Task icon highlighted

42. Search for the new work schedule

On the **Manage Work Schedule Assignment Administration** screen:

1. Enter Jay in the **Name** field.
2. Set **Type** to Time.
3. Click **Search**.
4. In the results, find Jay Demo Work Schedule with **Type** Time, **Effective from Date** 05/01/2015, and **Effective to Date** 12/31/2015.

5. Select that row.



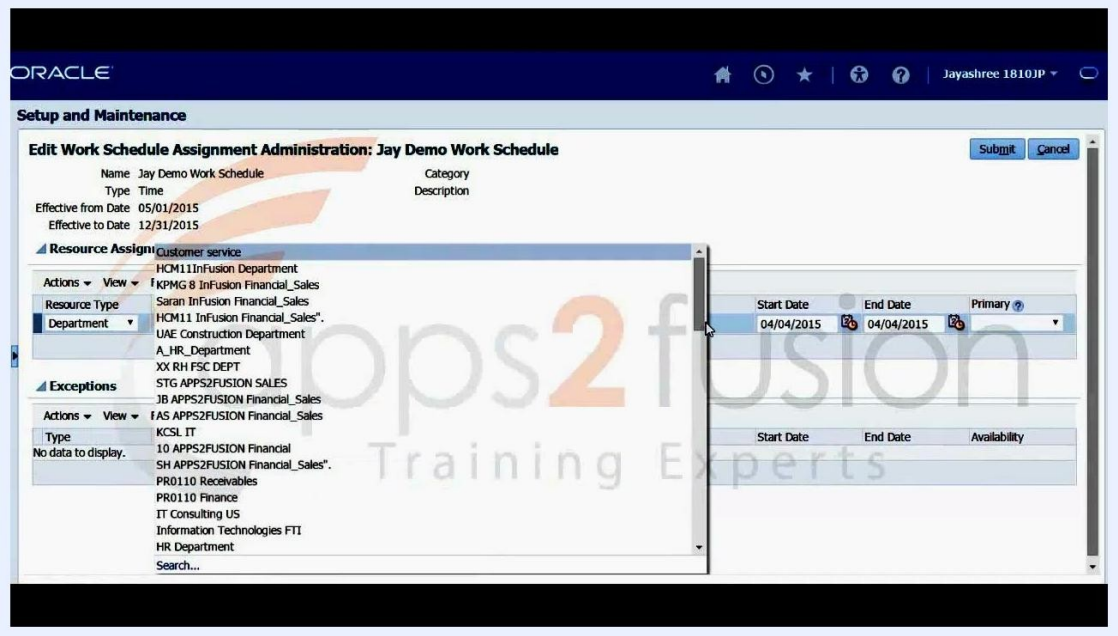
Search results with Jay Demo Work Schedule highlighted

43. Add a resource assignment

With Jay Demo Work Schedule selected, the **Edit Work Schedule Assignment Administration** screen opens. The schedule details appear at the top, including name, type, effective dates, and category.

1. In the **Resource Assignments** section, click the green plus icon (+) to add a new assignment row.
2. In the new row, set **Resource Type** from the dropdown. The options are Assignment, Department, Employment term, Enterprise, Job, Legal employer, Location, and Position. This example uses Department.
3. Set **Start Date** to 04/04/2015.
4. Set **End Date** to 04/04/2015.

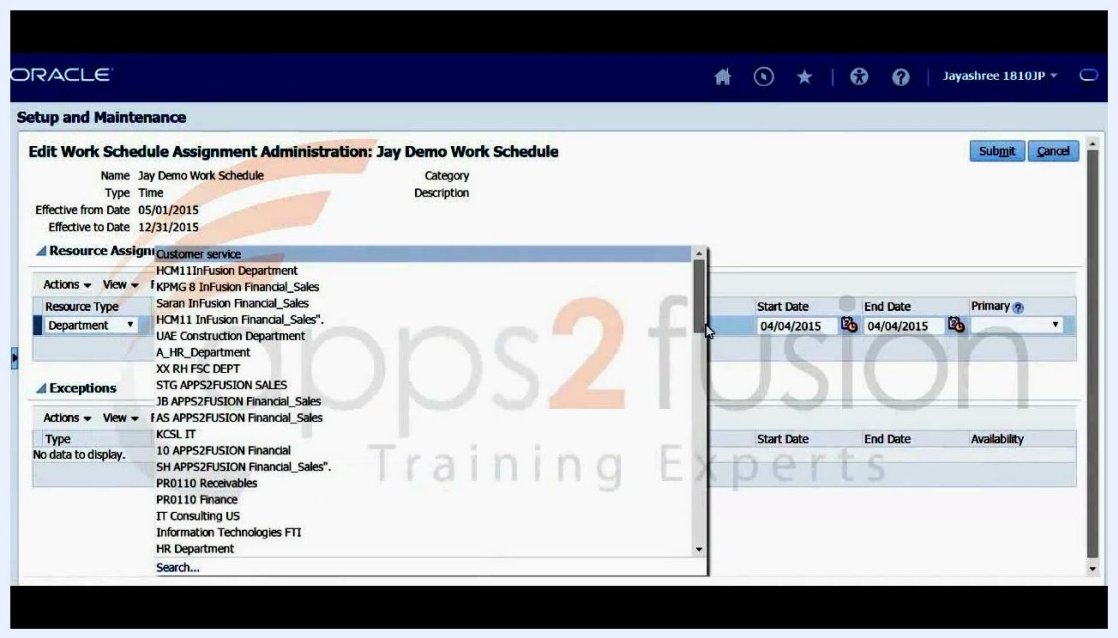
5. Mark the assignment as **Primary** if applicable.



Edit Work Schedule Assignment Administration screen with the Resource Type dropdown open

44. Select the department

In the **Name** column, click the dropdown to view the available departments. Scroll through the list and select the department you want. This example uses IT Consulting US.



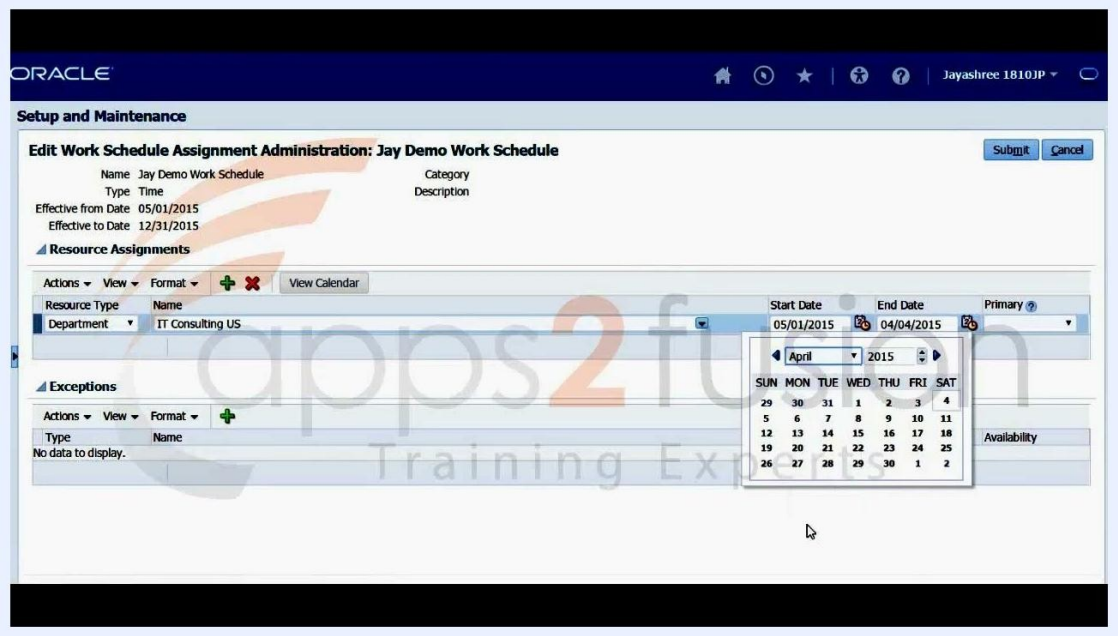
Department selection dropdown open with IT Consulting US highlighted

45. Confirm the assignment dates

On the **Edit Work Schedule Assignment Administration: Jay Demo Work Schedule** screen, find the **Resource Assignments** section.

1. Confirm that **Resource Type** is **Department** and **Name** is **IT Consulting US**.
2. In the **Start Date** and **End Date** columns, click the calendar icon to open the date picker.
3. In the calendar popup, make sure the month is **April** and the year is **2015**.
4. Select the date you want from the calendar grid. In this example, **End Date** is set to 04/04/2015.
5. Verify that **Start Date** is 05/01/2015 and **End Date** is 04/04/2015.

6. Optionally, check the **Primary** box to mark the assignment as primary.

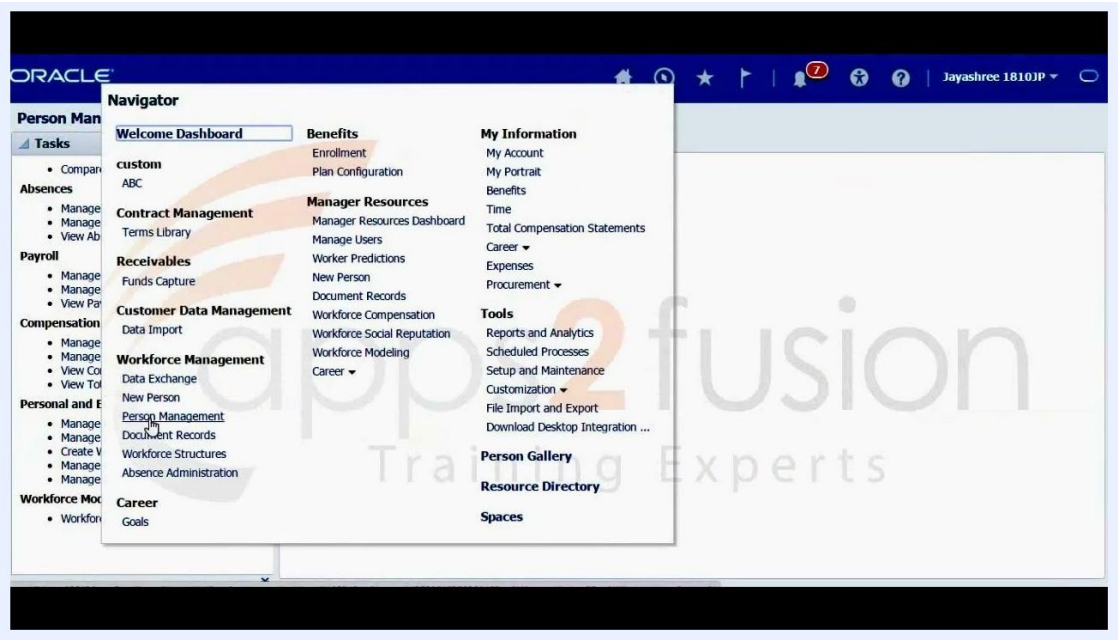


Calendar popup open for selecting an April 2015 assignment date, with the IT Consulting US department assignment row visible

Assign the work schedule to an employee

46. Open Person Management

Click the Navigator icon in the Oracle Fusion HCM interface. The Navigator menu shows modules and options such as Welcome Dashboard, Workforce Management, and Manager Resources. Under **Workforce Management**, select **Person Management**.



Navigator menu open with the cursor on Person Management under Workforce Management

47. Open Manage Work Schedule Assignment

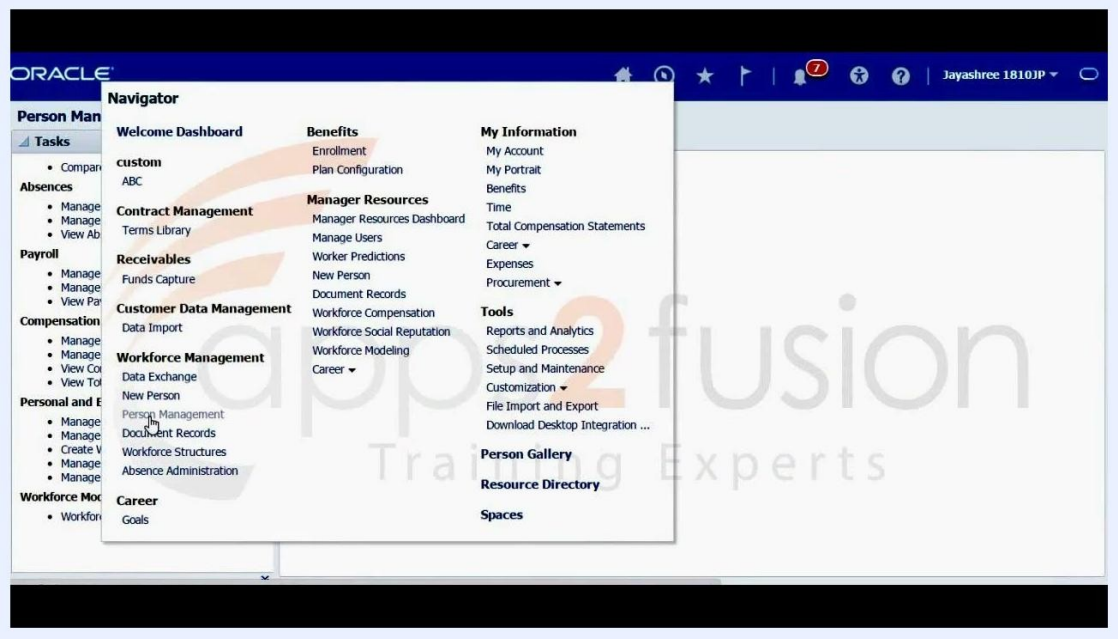
The **Person Management** screen loads.

- The **Tasks** pane on the left lists Absences, Payroll, Compensation, Personal and Employment, and Workforce Modeling.
- The main panel shows the selected employee's information, for example Name: employee demo, Person Number: 8897.
- Under the Absences section in the **Tasks** pane, click **Manage Work Schedule Assignment**.

48. Select a work schedule

The **Manage Work Schedule Assignment** tab opens. In the Schedules section, click the dropdown under **Name** to select a work schedule.

A list of available schedules appears, such as "CSL Work Schedule", "Jay rotation", and "DEMO_WS". Select the appropriate work schedule from the list.



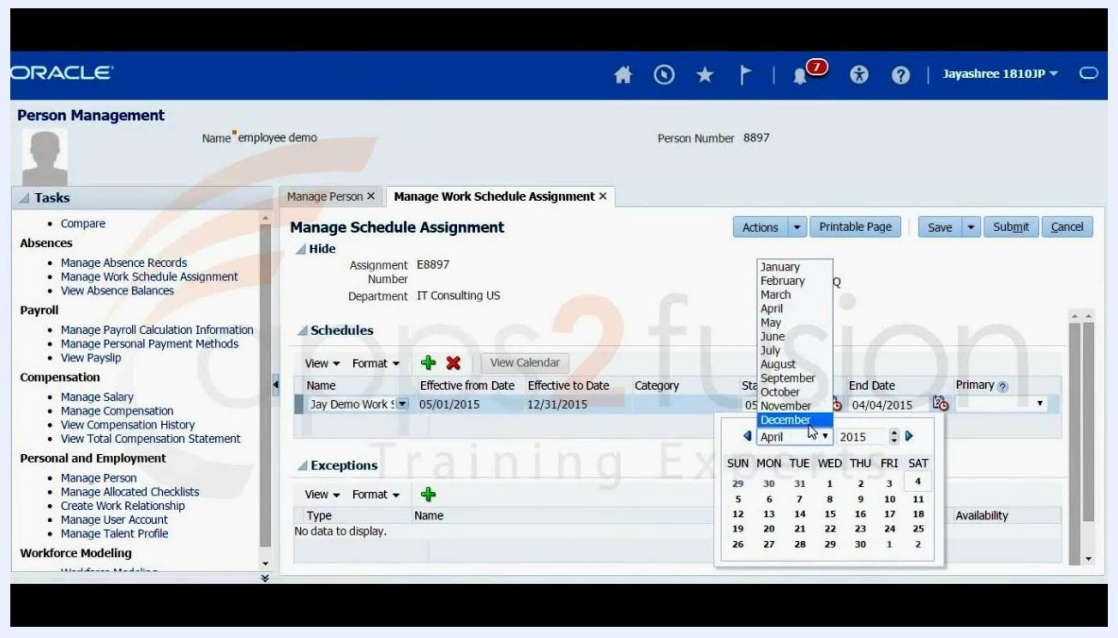
Work schedule dropdown open with multiple schedule options visible

49. Set the schedule effective dates

In the Schedules section, set **Effective from Date** and **Effective to Date** for the selected work schedule.

1. Click the calendar icon next to the date fields to open the date picker.
2. Select the month and year you want, for example May 2015 to December 2015.

3. Confirm each date by clicking the day in the calendar.



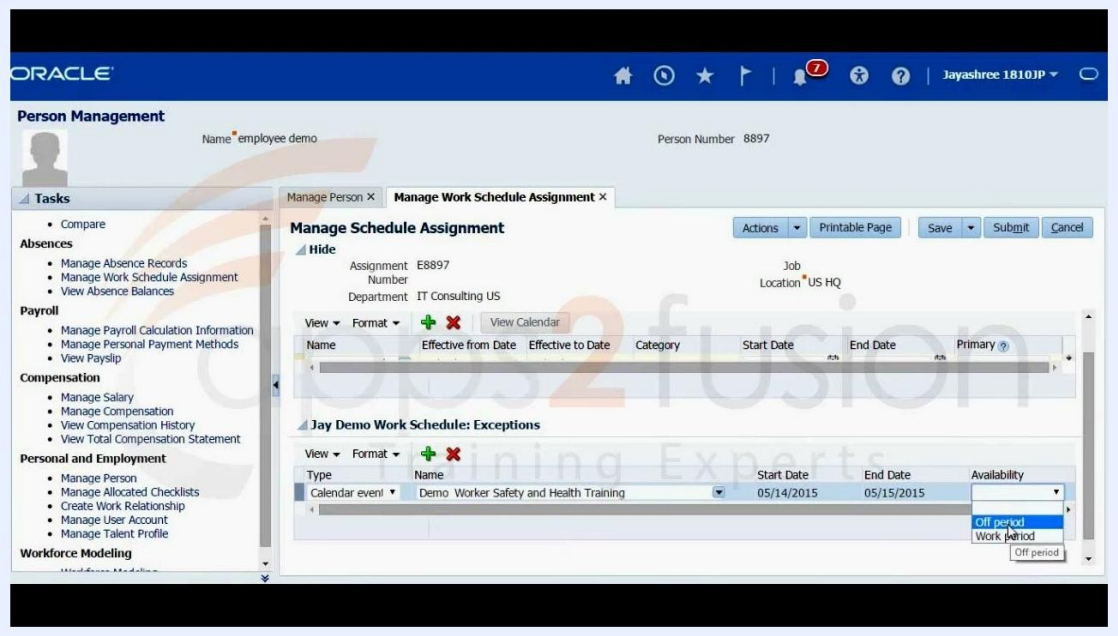
Date picker open for selecting the schedule effective dates

50. Add schedule exceptions

In the **Jay Demo Work Schedule: Exceptions** section, click the green plus (+) icon to add a new exception.

1. In the **Name** dropdown, select the exception type, for example "Demo Worker Safety and Health Training".
2. Set **Start Date** and **End Date** for the exception, for example 05/14/2015 to 05/15/2015.

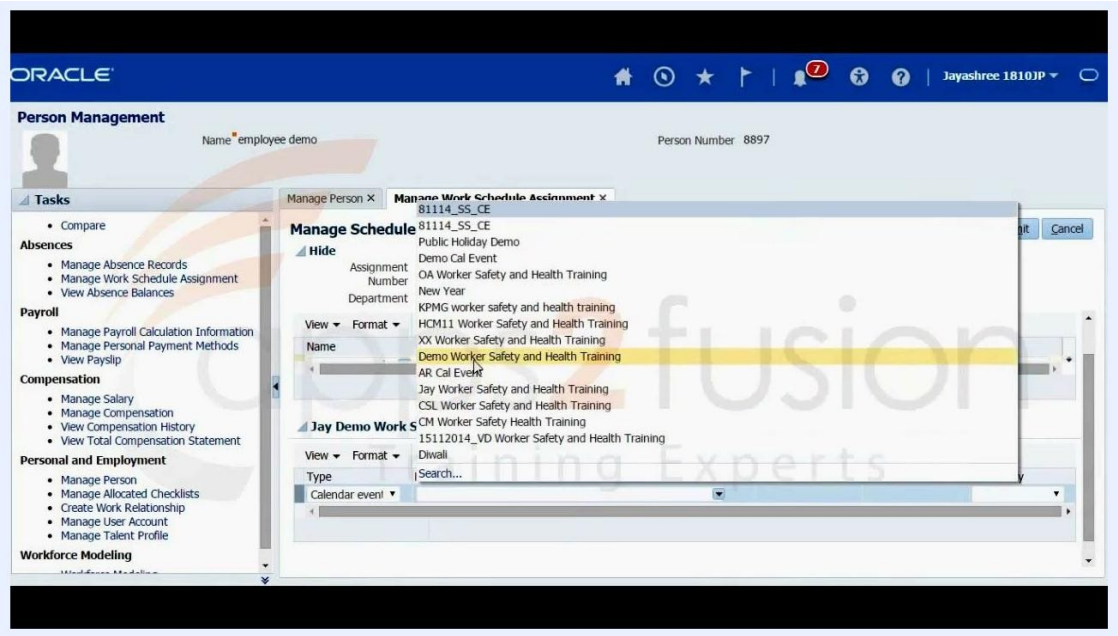
3. In the **Availability** dropdown, choose the appropriate value, for example "Off period" or "Work period".



Exception being added with the Availability dropdown for selection

51. Save and submit the assignment

After you enter all the schedule and exception details, click **Save** to store your changes. Then click **Submit** to finalize the work schedule assignment for the employee. The system processes the changes and updates the employee's schedule.



Manage Schedule Assignment screen showing no data to display after submission

Summary

You now know how to create a work schedule in Oracle Fusion from start to finish. You did the following:

- Added the DEMO_TE calendar event category and created the Demo Worker Safety and Health Training calendar event.
- Created the Demo DayShift and Demo Evening Shift work shifts.
- Built a workday pattern that combines both shifts, using a unique name such as Demo Workday Pattern test.
- Created Jay Demo Work Schedule with that pattern and submitted it.
- Assigned the schedule to a department in **Manage Work Schedule Assignment Administration**.
- Assigned the schedule to an employee in **Person Management**, added an exception, and submitted the assignment.