



Streamline Your Workforce Planning

Implementing Oracle Workforce Planning Module



MINDSTREAM[®]
ANALYTICS

- *Suzie Gilmartin*
Senior Consultant – Planning Essbase
MindStream Analytics

United States of America

South America

United Kingdom

Sweden

Australia

Finland

Iceland

Mexico

France

Spain

Singapore

China

Denmark

India

Middle East

Africa

Canada

Portugal

Hungary

Italy

Japan

Greece

Agenda

- About MindStream Analytics
- Introduction on Hyperion Planning Workforce Module
- Key Functionality
- Common Customizations
- Deployment

United States of America

South America

United Kingdom

Sweden

Australia

Finland

Iceland

Mexico

France

Spain

Singapore

China

Denmark

India

Middle East

Africa

Canada

Portugal

Hungary

Italy

Japan

Greece

About Suzie Gilmartin



- Senior Lead – Planning and Essbase
- Background: Accounting & Finance, consulting on Hyperion Planning/Essbase for 11 years
- Hyperion focus: Planning/Essbase, Reporting
- Oracle System 11 Certified Professional
- Clients: ConAgra, Yahoo, Intuit, Sony, Newmont Mining, Fannie Mae, Simplex Grinnell, Pearson, Kraft, Time Warner Cable, ING Direct



MindStream delivers premier consulting and managed services solutions to clients by enhancing technology and aligning resources through a systemic process to harness insight and enable financial and operational fact-base decision making.

United States of America

South America

United Kingdom

Sweden

Australia

Finland

Iceland

Mexico

France

Spain

Singapore

China

Denmark

India

Middle East

Africa

Canada

Portugal

Hungary

Italy

Japan

Greece

MindStream Analytics

- HQ – Boston, MA with national reach
- Just opened office in San Francisco
- Specialize in the implementation and optimization of best of breed BPM and BI solutions.
- Our people average over 9 years of experience in the BI or BPM space
 - extensive understanding of strengths and weaknesses of the various offerings
- Our deep understanding of financial and operational reporting helps us anticipate your needs. We strive to understand your business and combine it with our technical experience to help you Design and Implement a successful solution.

Hyperion Workforce – Intro



- Purpose:
 - Robust out-of-the-box functionality for quick deployment
 - Employee level planning
 - Uses Essbase database which allows for cross dimensional reporting capabilities – ability to slice and dice data
 - Reduces or eliminates need for stand alone Excel templates
 - Dynamic modeling that pushes expense changes automatically when employees are changed
 - Utilizes assumptions to drive employee related calculations
 - Additional plan type in Planning application for ease of integration with P&L expenses lines in other plan types



Hyperion Workforce – Intro

- Key Functionality:
 - Flexibility to plan at business required level (e.g. employee level, position level, cost center level)
 - Out-of-the-box accounts, business rules, webforms, smartlists, menus:
 - Managing existing employees
 - Adding new hires
 - Removing new hires
 - Transferring employees between cost centers
 - Dynamically adding expenses based on new hires
 - Uses Essbase database which allows for cross dimensional reporting capabilities – ability to slice and dice data

Functionality

Dimensions Performance Settings Evaluation Order

Employee Add Dimension Edit Dimension Sort: Descendants Search: Name

Expand Collapse Add Child Add Sibling Cut Paste Edit Delete Custom Attributes Show Ancestors Show Usage

Name (117 Total)	Alias (Default)	Data Storage	Security	Attributes	Plan Type
Employee		Never Share			8
Total Employees		Store			8
Existing Employees		Store			8
Emp-Sales		Store			8
Emp-Admin		Store			8
Emp-Production		Store			8
New Employees		Store			8
TBH1		Store			8
TBH2		Store			8
TBH3		Store			8
TBH4		Store			8

- Flexibility to build Employee dimension based on business needs
 - By Department (see screenshot)
 - By Manager
 - By Location
 - Alphabetically

United States of America

South America

United Kingdom

Sweden

Australia

Finland

Iceland

Mexico

France

Spain

Singapore

China

Denmark

India

Middle East

Africa

Canada

Portugal

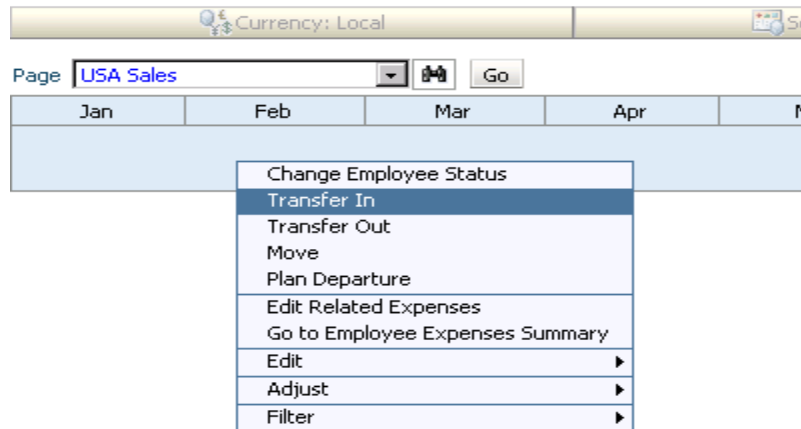
Hungary

Italy

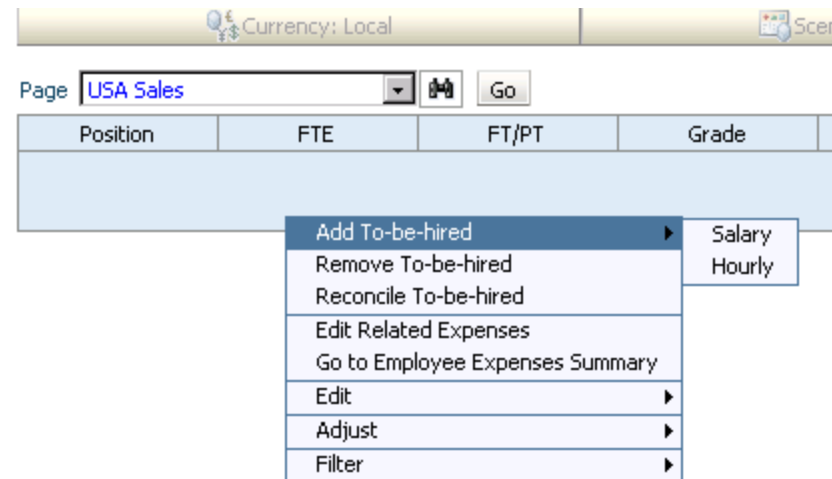
Japan

Greece

Functionality - Menus



- *Manage Existing Employees*



- *Manage New Hires*

- Adding new hires
 - # of new hires
 - Start month
 - Health plan
 - Grade
 - Market adjustment
 - FTE
 - Position
 - Tax region
 - Employee type
 - Salary basis
 - Pay type
 - Salary rate

Number of new hires	1
Start Month	"Jul"
FTE	1.0
Position	Assistant
Grade	1
Tax Region	No Region
Health Plan	None
Employee Type	Regular
Pay Type	Exempt
Market Adjustment	0.0

Help Add Cancel

- Change Employee Status
 - Options based on Status smartlist
 - Enter start month and duration
 - Adjusts salary and related expenses based on status

Field	Value
Action	None
Month	None
Duration in months	None
Year	None
Employees	None
Department	None

Dropdown menu for Action:

- None
- Active
- Departed
- Disability
- Leave of Absence
- Maternity
- On Sabbatical
- Transfer Out
- Transfer In
- Resigned

Buttons: Help, Change Employee Status, Cancel

Functionality – Business Rules

- Transfer
 - In, Out or Both Sides
 - Data transferred can be limited
 - Can be customized to transfer entire cost centers at once
 - Reconciliation to ensure both sides of transfer have occurred, encourages communication btwn cost centers

Employees	<input type="text"/>
Department	"E01_101_1000"
Month	"Jul"
Year	"FY10"
FTE	1.0
Position	Assistant
Grade	1
Tax Region	No Region
Employee Type	Regular
Health Plan	None
Hours per week	40.0
Pay Type	Exempt
Salary Rate	<input type="text"/>
Salary Basis	Annual
Merit Month	Jan

Help Transfer Cancel

Functionality – Turnover %

- Turnover % Input
 - Can be used to plan turnover rates
 - Seasonality for retail companies
 - High turnover locations such as call centers
 - Reductions in workforce
 - Increase or decrease headcount
 - Enter + rate it increase headcount, enter – rate to decrease headcount
 - Calculates adjustment to a “department general” employee
 - Calculates both headcount # and salary \$ adjustments

The screenshot shows a software interface with a header bar containing 'Scenario: Plan' and 'Version: Working'. Below the header, there is a 'Page' dropdown menu set to 'North America Corporate' and a 'Go' button. The main area is a table with columns for months (Jan, Feb, Mar, Apr, May) and rows for different metrics. The 'Turnover %' cell for January is highlighted with a blue border.

		Jan	Feb	Mar	Apr	May
Department General	Turnover %	<input type="text"/>				
Department General	Turnover headcount Adjustment					
Initial Employees	Total Regular Headcount					
	Total Headcount					

Functionality – Tax Rates

- Calculating Payroll Taxes
 - Calculates payroll taxes at the employee level
 - Administrator inputs tax rates and salary caps
 - Workforce automatically tracks y-t-d salary by employee
 - Taxes calculate automatically based on salary expense
 - Can also be redesigned to calculate at cost center level

	FY10	FY11	FY12
SSTax Rate1 Input			
SSTax Rate2 Input			
SSTax Cap Input			
SUI Rate Input			
SUI Cap Input			Row
FUTA Rate Input			
FUTA Cap Input			
Medicare Rate Input			

Functionality – New Hire Exp

- Dynamically calculate expenses for new hires
 - Administrator or cost center managers can enter assumptions for new hire expense spending and tie this to headcount additions
 - Computer Hardware/Software
 - Office Supplies
 - Furniture
 - Relocation and Recruitment
 - Sign on bonus

Currency: Local Scenario: Plan

Page: No Entity TBH1 Go

	Jan	Feb	Mar	Apr	May	Jun
Recruiting						
Relocation						
<input type="checkbox"/> New Hire Related Expenses						
Training						
Travel						
Telephone						
Office Supplies						
Departure Costs						
Miscellaneous						
Hardware						
Software						
Furniture						
<input type="checkbox"/> Total Employee Capital Purchases						
<input type="checkbox"/> Employee Related Expenses						
Sign On Bonus						

Period : Mar - Click and drag to resize this column, or double click to minimize and restore it



Functionality – Rate Overrides

- Cost center managers can override pre-defined rates
 - Override accounts for Merit% and Bonus%
 - Managers can enter overrides by Employee, if no Override % exists, then system uses existing rate

Page

Assumption							Mar			Sep		
Annual Salary	Differential %	Performance	Merit Month	Rec. Merit %	Override Merit %	Merit Adjustmer	Rec. Bonus %	Override Bonus	Bonus	Rec. Bonus %	Override Bonus	Bonus
There are no valid rows of data for this data form.												



Common Customizations

- Smartlists

- Smartlists values should be customized to match HR system data whenever possible (e.g. Positions, Status, Grades, Health Plans, Performance)
- Additional Smartlists can be added based on business needs (Location, Manager, etc)
- Smartlists are a text representation of a value and can be used in calculations and on reports.

- **Business Rule Customizations**

- Suppress prompts that can be populated based on web form point of view or page selections
- Prompt Values (ability to limit or expand choices)
- When using override accounts, allow for a \$ override in addition to or instead of a % override.

- **Dimension Customizations**

- Adjust # of TBH's allowed per cost center (Employee Dimension)
- Create additional dimensions to meet business requirements (e.g. Project)
- Create alternate hierarchies in the Employee dimension for reporting or calculation purposes (e.g. main hierarchy based on department, alternate hierarchy based on manager)

Common Customizations

- Webforms
 - Workforce comes with approximately 20 webforms
 - Most clients trim this number significantly
 - A couple driver input forms for the administrator
 - Form to manage existing hire status
 - Form to add new employees
 - Form to manage/review all employees
 - Makes process more manageable and easier to navigate for users; less confusing
- Multi-year planning
 - Use “behind the scenes” system accounts and minor tweaks to business rules to allow for multi-year employee planning

Deployment Considerations

- Out-of-the box build can take 2-4 weeks if well prepared
- DISABLE, don't DELETE
- Rename or LCM business rules once module is deployed
- Discussion with HR needed
 - Security/Confidentiality concerns (store data files in secured directory, FDM cleared out after data load)
 - Ability to get data in timely fashion
 - How fast is HR system updated?
 - Will Workforce Planning drive HR changes? (new hire requests, transfers, etc)
 - Frequency of updates
- Number of Employees
 - Have applications with 15,000+ employees and no performance issues

United States of America

South America

United Kingdom

Sweden

Australia

Finland

Iceland

Mexico

France

Spain

Singapore

China

Denmark

India

Middle East

Africa

Canada

Portugal

Hungary

Italy

Japan

Greece

Questions

Thank You !

Contact information:

Suzie Gilmartin – sgilmartin@mindstreamanalytics.com (Lead Consultant)

Mark Gregoire – mgregoire@mindstreamanalytics.com (EVP Sales)

Alex Ladd – aladd@mindstreamanalytics.com (Sr. Partner)

www.mindstreamanalytics.com

