Oracle® Hyperion Workforce Planning

Administration Guide

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ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

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1 Introduction to Workforce Planning

In This Chapter

About Workforce Planning

Oracle Hyperion Workforce Planning is a web-based workforce planning and budgeting solution. It gives corporations a tool to model future headcount and related expenses, and provides a reliable source of up-to-date information about workforce expenses. By planning salary expenses in direct correlation to headcount, planners can effectively manage one of their largest variable expenses.

With Workforce Planning, all decision-makers and front-line managers can communicate which course of action to take and ensure that budget holders collaborate, which optimizes and streamlines the headcount process. When a material event occurs that causes a change in direction, planners have the flexibility to adapt rapidly, ensuring that plans are relevant and useful.

More specifically, Workforce Planning:

- Calculates workforce-related expenses, including headcount, salary, taxes, and health care benefits
- Includes employee transfer functionality, facilitating headcount management across dynamic organizations
- Provides a framework for customizing planning, meeting the needs of global enterprises
- Provides drill-through from summary values to underlying detailed data
- Includes event-based activities, such as new hires, which can trigger expenses for equipment and hiring bonuses
- Offers all the functionality of Oracle Hyperion Planning, such as forecasting and reporting
- Integrates with other systems to load information: with flat files for applications using Oracle Hyperion EPM Architect application administration and typically with the Outline Load utility for applications using Planning application administration.

- Supports working with Workforce Planning forms using Oracle Hyperion Smart View for Office

Prerequisites

This section describes prerequisites for setting up and managing Workforce Planning. You should understand:

- Planning functionality (see the *Oracle Hyperion Planning Administrator's Guide*, the *Oracle Hyperion Planning User's Guide*, and their online help)
- The Workforce Planning business model (see "Business Model" on page 10)
- If you use Performance Management Architect, see the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide* and online help.

Business Model

All companies create plans to help prepare for the future, aligning their limited corporate resources—people and dollars—against the strategies that they believe best leverage their competitive market advantage. Through collaborative planning, departments coordinate and allocate the company's finite resources. Companies that can best detect market opportunities and quickly realign their resources gain a competitive advantage. A company's workforce represents its most critical resource.

Using Workforce Planning, companies determine the employee resources needed to achieve their targets, assign existing employees to various jobs, and plan for adding new employees. Companies must also gauge the various direct and indirect costs incurred by employees, such as health care, bonuses, and taxes. Workforce Planning calculates these expenses—both simple and complex—based on certain drivers. Driver-based planning runs key business assumptions through models, providing the insight to proactively manage the volatility of future financial performance. For example, performance drives bonus and merit increases, primary factors in determining total compensation.

Workforce Planning enables actions such as transferring employees to another department, planning for their departure, and placing them on maternity leave or leave of absence.

Corporate planners, operational managers, or department managers prepare the workforce plans, sometimes including multiple scenarios. They submit them to senior financial and Human Resource managers for review and approval. A corporate planner typically consolidates the plan and prepares reports about the workforce. Companies can iterate plans, when necessary, to respond to changing conditions.

Predefined Dimensions

Subtopics

- Account
- Employee
- Job

Caution! Changing the default order of dimensions that were created by initializing Workforce Planning might result in business rules not working correctly and may require changes to business rules logic.

Account

Workforce Planning creates an alternate hierarchy in the Accounts dimension under the parent Workforce Planning Accounts whose members store employee and job properties that drive calculations.

There are many types of accounts, for example, Smart Lists, text accounts, date accounts, and financial accounts. You can populate the Account dimension with your company's specific accounts, and you can also customize the predefined accounts to meet your needs. The accounts are then used to plan, forecast, or compare plans to actual results.

The Account dimension contain members that:

- Drive calculations
- Store the results of the calculations
- Provide informational characteristics about employees that are collected in the planning process, such as start month, merit month, status, and pay type

Notes:

- If you change the accounts that Workforce Planning provides, then you must also modify the corresponding business rules, member formulas, and forms so that the application works as expected. Also, if you customize accounts and business rules and later upgrade Workforce Planning, you lose your modifications and must redo them.
- You can create an alternate hierarchy for your financial accounts that you can enable in other plan types of the application. If you do create accounts that are enabled for the **Wrkforce** plan type, then you must build logic that allows planners to capture data or calculate data for these accounts.
- If you initialize Workforce Planning in an existing application, then you should rename any members in the Account dimension that conflict with a predefined member.

See "Account Dimension" on page 25.

Employee

The Employee dimension contains employees of the organization. Calculations (for example, salary and other compensation) can be performed for existing employees or to plan for new hires. Oracle anticipates that existing employees are imported from a Human Resources system, such as PeopleSoft.

To support planning for new employees, as a starting point, Workforce Planning provides 100 Hiring Requisition members. Administrators can add more hiring requisitions based on implementation requirements (see "Changing the Number of Hiring Requisitions" on page 28). To add employees, you create requisitions for a job; the requisition can be filled when an employee is identified.

See "Employee Dimension" on page 27.

Job

The Job dimension stores the roles assigned to employees in the organization. Examples of jobs: Engineer, Software Developer, and Mechanic. 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. You are not required to plan at a detailed employee level. If your organization does not perform detailed employee planning, you can use the Job dimension with the Hiring Requisition members in the Employee dimension.

See "Job Dimension" on page 28.

Predefined Artifacts

Subtopics

In addition to the predefined dimensions, Workforce Planning provides a set of predefined artifacts that work together, enabling companies to model future headcount and related expenses. Using Workforce Planning, you can maintain a reliable source of up-to-date information about your workforce expenses.

Forms

Workforce Planning provides a set of predefined forms with which you work to plan and analyze workforce data. You can open forms as you step through the task list tasks, or you can select and open forms under **Form Folders**. Many tasks employ master details forms, which are composite forms that show detailed information in the top form and summary information in the bottom form.

If you modify the predefined forms, synchronize changes with the business logic, such as business rules, member formulas, and outline structure. Whenever you modify your business logic, check your forms.

For a description of the task lists that organize access to the forms, see "Task Lists" on page 13.

Business Rules

In Workforce Planning forms, many shortcut menu options launch business rules, which display runtime prompt windows that you use to select data, apply changes, and calculate expenses. Planning applications, including Workforce Planning, use Oracle Hyperion Calculation Manager to design and manage business rules. Predefined business rules enable you to perform these tasks:

- Calculate workforce-related expenses
- Analyze workforce expenses

Task Lists

Workforce Planning includes task lists that help users navigate the application to ensure complete data collection. The task lists are designed to align with administrative users and planners.

You can modify the task lists in Workforce Planning to add your own tasks. For example, you can add tasks that include instructions on reviewing data, entering data, or running business rules. You can also set who can view and modify task lists. See "Managing Task Lists" in Chapter 9 of the *Oracle Hyperion Planning Administrator's Guide*.

Note: Being assigned to a task list means users can access and complete tasks in the task list. It does not mean they can assign tasks to someone else.

Task lists in Workforce Planning are organized in the following categories:

- **Workforce Administration**—For performing such tasks as setting mid salary rates, benefits, additional earnings such as bonus and merit increases, and assumptions for use in resource planning. Administration tasks also enable importing employees and calculating compensation.
- **Workforce Planning**—For managing resources such as planning employee compensation and adding new hires.
- **Workforce Analysis**—For helping resource managers review and analyze employee compensation, FTEs, and headcount.

Menus

Workforce Planning includes shortcut menus that drive calculations on forms. The shortcut menus display another form or launch a business rule to perform a Workforce Planning calculation. Which shortcut menus display depend on the form settings and where you right-click within the form.

If you add or modify business rules and forms, update the existing menus or create menus to support the change. For example, if you delete a business rule referenced by a menu, remove the business rule from the menu. You can delete shortcut menus without affecting calculations. See “Working With Menus” in Chapter 12 of the *Oracle Hyperion Planning Administrator's Guide*.

Smart Lists

Smart Lists are linked to the dimension members used to manage jobs and employees and to build compensation budgets using forms. For example, the EmployeeType Smart List includes Temporary, Regular, and Contractor values. Smart Lists are also used by business rules that perform calculations. See the *Oracle Hyperion Planning Administrator's Guide* or the *Oracle Hyperion Planning User's Guide*.

As an administrator, you can add additional entries to the predefined Smart Lists or create Smart Lists. If you customize Smart Lists, you must modify or write calculation logic that uses the modified entries. See also “Adding Smart Lists or Menus” on page 29.

2 Creating and InitializingWorkforce Planning Applications

In This Chapter

You can create and initialize a new Workforce Planning applications using Performance Management Architect application administration or Planning application administration.

Initializing Workforce Planning loads predefined:

- Account, Entity, Employee, Scenario, and Version members
- Forms
- Smart Lists
- Member formulas
- Business rules
- Shortcut menus
- UDA

Before you initialize Workforce Planning:

- Review the predefined artifacts, identifying which artifacts you can use and which artifacts you need to customize. For example, you may want to add task lists to further guide users in the planning process. The better you understand the model and plan your application, the easier it is for planners to use Workforce Planning.
- When initializing Workforce Planning in an existing application, update your dimension outlines to resolve differences between Workforce Planning member names and names in your existing application.
- Plan the Entity dimension structure if you will use both Workforce Planning and Oracle Hyperion Capital Asset Planning.

  Initializing Workforce Planning produces one No Entity member; initializing Oracle Hyperion Capital Asset Planning produces a few Entity members. You can change the Entity members after you initialize the applications.

Caution! Changing the default order of dimensions that are created by initializing Workforce Planning might result in business rules not working correctly and may require changes to business rules logic.

➤ Initialize Workforce Planning applications by selecting **Administration**, then **Application**, and then **Manage Applications**.

Creating and Initializing Applications

Subtopics

- Using Performance Management Architect Application Administration
- Using Planning Application Administration

Using Performance Management Architect Application Administration

Follow the steps in this section to use Performance Management Architect application administration.

Creating a Workforce Planning Application

To add the Workforce Planning plan type to an existing Planning application, skip to the next section.

➤ To create a Workforce Planning application:

1. For instructions, see "Building Applications" in the *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide*.

   Note: On the first screen of the Performance Management Architect application wizard, you must select Year and Period as default dimensions.

2. For **Plan Type**, select **Wrkforce.**

Adding the Workforce Planning Plan Type to an Existing Planning Application

If you have an existing Planning application, follow these steps to add the Workforce Planning plan type to an existing Planning application.

➤ To add the Workforce Planning plan type to a Planning application:

1. In Performance Management Architect, select **Navigate**, then **Administer**, and then **Application Library.**

2. In the **Application Library**, right-click the application to which you want to add the Workforce Planning plan type, select **Initialize**, and then select **Wrkforce.**
3. Click **Yes** to confirm.

Deploying Performance Management Architect Workforce Planning Applications to Planning

After you create a Workforce Planning application, it is validated and deployed to Planning immediately. The deployment process creates a Planning application automatically.

If the application does not initialize successfully, validation fails and error messages are displayed. Correct any errors and redeploy the application. Your Workforce Planning application is initialized when you successfully deploy an application with **Wrkforce** selected as the plan type.

If you need to redeploy a Workforce Planning application to Planning, for instructions, see "Validating and Deploying" in the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide*.

After you deploy the application from Performance Management Architect to Planning, communicate the URL for logging on, the logon instructions, and information about the planning process.

Tip: You can put the URL on your company's intranet.

Using Planning Application Administration

To create a Workforce Planning application using Planning application administration, see the *Oracle Hyperion Planning Administrator's Guide*. When using the Application Wizard to create an application, select the **Wrkforce** plan type.

After creating a Workforce Planning application, you must initialize it.

➤ To initialize a Workforce Planning application:

1. Start, and then log on to Planning.
2. In Planning, select **Administration**, then **Application**, and then **Manage Applications.**
3. Click the icon **Select currently logged in application to initialize modules.**
4. Refresh the application.

   See "Initial Implementation Tasks" on page 17.

Initial Implementation Tasks

Users who are responsible for setting up and initializing Workforce Planning in your organization define and prepare applications by performing the following tasks.

➤ To implement a Workforce Planning application:

1 **Install and configure Workforce Planning.**

See the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.

2 **Create and initialize the Workforce Planning application.**

See "Creating and Initializing Applications" on page 16.

3 **Load your Grade members in the Account dimension under the Average Salary by Grade member.**

See "Adding Grade Levels" on page 32.

4 **Load the Entity dimension with members corresponding to the entities in the organization.**

See "Loading Information into Workforce Planning " on page 21.

5 **Load the roles assigned to employees in your organization as members in the Job dimension.**

The Job dimension is used with the Employee dimension to track employees by role, so import employee data at the correct intersection of the Job and Employee. See "Loading Information into Workforce Planning " on page 21.

6 **Review the existing members of the Scenario and Version dimensions and add or modify members if necessary.**

Caution! To prevent overwriting your Actual data, tag your Actual scenarios with the UDA named ACTUAL before running any calculations. See "UDAs" on page 31.

7 **Load the existing employees from the company's HRMS as members in the Employee dimension.**

See "Employee Dimension" on page 27.

8 **To synchronize the application with Oracle Essbase, refresh the application.**

9 **Review the loaded data.**

10 **Set the correct values for the substitution variables, which are used in predefined Workforce Planning forms.**

- CurYr - Set to the current year. For example, if the current year is 2013, set this variable to FY13.
- LastYr - Set to the previous year, for example, FY12. Ensure that the previous year exists in the Year dimension.
- NextYear - Set to the next year, for example, FY14.
- Yr3 - Set to the year after NextYear, for example, FY15.
- Yr4 - Set to the year after Yr3, for example, FY16.
- ThisMonth - Set to the current month.
- CurScenario - Set to the current scenario.
- CurVersion- Set to the Working version member.
- FinVersion - Set to the Final version member.
- ForVersion - Set to the Working version member.

- PlanVersion - Set to the Final version member.
- Thisyear - Set to the current year.

11 **You must populate the Grade Smart List with the grade level values from your company's HRMS.**

For a list of all predefined Smart Lists, see "Smart Lists" on page 28.

12 **Ensure that all users set the following user variables for themselves:**

Table 1 Setting User Variables

User Variable Name	Description
Entity View	Set to the entity to which the user has access.
Scenario View	Set to the scenario to which the user has access.
Version View	Set to the version to which the user has access.
Reporting Currency	Set only for a multicurrency application.

Note: Workforce Planning forms include user variables to ease usability. You cannot open any forms without correctly setting these user variables.

13 **Set access permissions for users and application artifacts.**

See "Securing Applications" on page 19.

Securing Applications

Security is based on the roles assigned to users in Oracle Hyperion Shared Services (see the *Oracle Enterprise Performance Management System User Security Administration Guide*) and by the access permissions granted in Planning to users and to groups (groups are sets of users who have similar access permissions). See the *Oracle Hyperion Planning Administrator's Guide*.

By default, users can open only those artifacts, such as forms, task lists, and members, to which they have been granted access permissions. Assign access using the following guidelines, as described in "Setting Up Access Permissions" and "Assigning Access to Members" in the *Oracle Hyperion Planning Administrator's Guide*.

We suggest you secure artifacts as follows:

- Dimensions and members - If you give planners access to a member, they also have access to that member's data. Salary information is sensitive. You can hide it from viewing and reporting by denying users or groups access to members or to their parents (assign the access type None). You can also screen information by withholding access to certain forms.
  - Entity dimension:

    Grant access so that planners can view and change information only for their own departmental entities. Doing so ensures that users can view and modify only compensation or employees specific to their department or cost center. Similarly, grant only cost center or department managers and planners access to the General Ledger entities in their cost centers or departments.

Set view access to the global assumptions set at the No Entity member level.

- ❍ Employee and Job dimensions:

  Apply access permissions at the dimension level to those users who perform employee or job planning.

  Secure the employee and salary information loaded from HRMS based on their relevance to planners.

  You need not secure job codes in the Job dimension.

- ❍ Account dimension:

  Grant users access to predefined accounts by the plan type, Wrkforce.

  Secure the General Ledger accounts appropriately for the planning process.

  Appropriately secure the defaults for Additional Earnings and Employer-paid Taxes.

  Although you can secure members of the Grade accounts, grade values are globally visible in Smart Lists. However, Smart Lists do not contain salary information.

- ❍ Scenario and Version dimensions:

  Grant users access to scenarios, for example, by providing write access to the Plan and Forecast scenarios and read access to Actual.

  Grant users access to versions, for example, by assigning view access to the final version but setting write access to Working or What If versions.

  Permissions for versions are independent of scenarios, so view access to the final version prevents write access to the final version data for all scenarios.

  During the planning cycle, administrators may need to change the access to scenarios and versions to prevent users from modifying data combinations.

- Forms - Assign appropriate access to forms based on their relevance to users. For example, you might grant only the Human Resources manager access to the forms in the Workforce Administration form folder. When you grant users access permission to a folder, they can view all of its child folders and forms.

  To simplify setting up security by segregating tasks, folders are organized by Administration, Planning, and Analysis.

- Task Lists - Assign appropriate access to task lists based on their relevance to users. For example, you might allow planners access to the **Workforce Analysis** task list, but not to the **Workforce Administration** task list.
- Planning unit hierarchies - Grant access only to cost center owners or reviewers.
- Business rules - Assign access permissions to business rules to ensure that users have access to business rules associated with their tasks.

Loading Information into Workforce Planning

You may want to load information, such as the existing employee structure, employee properties, and payroll data, from enterprise systems:

- If you use Performance Management Architect application administration, load information using a flat file (see the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide*).
- Use the Outline Load utility, described in the *Oracle Hyperion Planning Administrator's Guide*.

You can also:

- Manually enter information into Workforce Planning
- Load data (but not metadata) through Oracle Essbase Administration Services. See the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide*.

See "Initial Implementation Tasks" on page 17.

Logging On and Accessing Workforce Planning

You set up Workforce Planning in the Oracle Hyperion Enterprise Performance Management Workspace environment. The default EPM Workspace URL is `http://`*`web server`*`:`*`port`*`/workspace/`, where *`web server`* is the web server machine hostname and *`port`* is the web server listen port. For information about installing and configuring EPM Workspace, see the *Oracle Enterprise Performance Management System Installation and Configuration Guide* and the *Oracle Hyperion Enterprise Performance Management Workspace Administrator's Guide*.

➤ To log on to EPM Workspace and access Performance Management Architect (for Performance Management Architect application administration), Planning, and Workforce Planning:

1. Ensure that the web server is started and the web application server is running in the Services panel.
2. In the web browser, enter the URL for the Oracle Hyperion Enterprise Performance Management Workspace **Log On** page.
3. Enter your system user name.
4. Enter your system password.
5. Click **Log On**.
6. **For Performance Management Architect applications:** To access Performance Management Architect, select an option from the **Navigate** menu.

   For example, select **Navigate**, then **Administer**, and then select **Dimension Library** or **Application Library**. For information about Oracle Hyperion EPM Architect, see the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide* or online help.
7. Select **Navigate**, then **Applications**, then **Planning**, and then select an application.

3

Administering Workforce

In This Chapter

About Administering Workforce Planning

Subtopics

- Process
- Workforce Assumptions
- Account Dimension
- Employee Dimension
- Job Dimension
- Forms
- Smart Lists
- Menus
- Adding Smart Lists or Menus
- Member Formulas
- Business Rules
- UDAs

All companies create plans to help prepare for the future, aligning their limited corporate resources—people and dollars—against the strategies that they believe best leverage their competitive market advantage. Through collaborative planning, departments coordinate and allocate the company's finite resources. Companies that can best detect market opportunities and quickly realign their resources gain a competitive advantage. Employee compensation is among a company's largest expenses and is its most critical resource.

Workforce Planning enables you to manage, prioritize, and plan for these resources, providing a comprehensive view of the resources and facilitating hiring decisions. Administering workforce expenses involves planning or forecasting employee compensation expenses. For an overview of the administration process, see "Process" on page 24. For steps on setting up the application, see "Initial Implementation Tasks" on page 17.

Process

Oracle recommends the following process to maximize your investment from Workforce Planning:

Begin by loading employee data (dimensions and data) from your HRMS. Load employee IDs, or names, or both, into the Employee dimension. Load the Job dimension with jobs in your organization. After you update and refresh the dimensions, you can load salary-related data for existing employees into Workforce Planning for the financial plan you are preparing, such as Plan or Forecast. Load employee data, including salary, FTE, and all Smart List assignments into the application. Review and update global rates for the planning period. After employee data and assumptions are updated, you can calculate compensation for existing employees.

Now the application is ready for use by planners. Because compensation for existing employees has been calculated, end users' role is primarily to review and update data: verifying the employees assigned to their entity and planning for raises, merit increases, promotions, transfers, and adding hiring requisitions. This process give users more time to analyze their employees' compensation and to make strategic decisions for the future.

For information about setting up applications, see:

- "Initial Implementation Tasks" on page 17
- "Securing Applications" on page 19.
- "Loading Information into Workforce Planning " on page 21.

Note: Workforce Planning gives you the flexibility of planning full employee compensation or alternatively, simply planning by job.

Workforce Assumptions

Workforce assumptions are used in calculations to derive compensation-related expenses. Workforce assumptions can be set by entity or at the No Entity level (for default assumptions). If the assumptions are set for the entity, then they are used for calculations; otherwise, the assumptions set for No Entity (at the organization level) are used.

The workforce resource assumptions include:

- Midpoint salary by grade, used in new hire salary calculations
- Employee benefits assumptions, which drive calculations for health care costs, merit increases, bonuses, and taxes
- Working hours and days, which drive salary and overtime expenses for hourly employees

Account Dimension

Subtopics

- About Accounts
- Spreading Data Using System Members

Employee properties (such as Annual Salary, Grade, FT/PT, and FTE) are stored as Account members, which are used in compensation-related calculations such as Salary, Merit, Bonus, and Health Benefits. Furthermore, many of the accounts depend on another property or are associated with a Smart List. For example, the value in the FT/PT (full time/part time) Account member depends on the value entered in the FTE (full-time equivalent) account. You can customize and add employee properties to meet your organization's needs.

About Accounts

Salary accounts include members that indicate Annual Salary, Merit, Bonus assumptions and informational fields such as Salary Basis (Hourly or Annual) or Pay Type (Exempt or NonExempt).

Annual Salary is calculated:

Table 2 Annual Salary Calculation

Salary Basis	Pay Type	Salary Rate	Annual Salary
Hourly	Exempt	Amount the employee makes per hour	(Salary Rate * Number of hours worked per week) * 52 * FTE
Hourly	Non-Exempt	Amount the employee makes per hour	@MIN(Hours per Week, No Employee- >BegBalance- >Hours per Week- >No Job) * Salary Rate * 52 * FTE
Annual	NA (Pay Type is considered only for Hourly employees)	Amount the employee makes per year	Multiply Salary Rate by FTE

Conceptually, the Employee Expenses member is calculated thus, using hypothetical rounded numbers on a monthly basis.

Table 3 Model of Salary Calculations

Type of Value	Member Name	Example Amount
Input	Salary Rate	100,000
Input	FTE	0.75
Calculated	Annual Salary	Status = Active
Calculated	Salary	6,250 (75,000/12)
Calculated	Merit Adjustment %	5% Calculated based on Rec Merit% or Override Merit%

Type of Value	Member Name	Example Amount
Calculated	Merit	213 (6250 * 5%)
Calculated	Adjusted Salary	6563 (6250 + 253)
Input or Calculated	Bonus %	10%
Input	Bonus Basis	Depends on Bonus Basis Input (Quarterly, Semiannually, or Annually)
Calculated	Bonus (annual total, based on two six-month bonuses)	625 (monthly) Calculated as: Bonus% * Adjusted Salary * BonusBasis
Calculated	Total Salary	7,188 (6563 + 625)
Input	Health Plan	Family Plan
Calculated	Health Care Cost	300
Calculated	Total Compensation	7,488 (7,188 + 300)
Calculated	Taxes	2,000
Calculated	Employee Expenses	9,488

Planners input some of the values, and Workforce Planning calculates others. For values listed as Input or Calculated in the table, planners can accept the default value or override it.

Essbase calculates members in the order of the outline. If you move accounts in the outline, you must be careful about dependencies. Likewise, if you rewrite the logic, you may need to reorder the outline.

Spreading Data Using System Members

You can use System Members account members to spread data for calculations in Workforce Planning. You can spread driver members across time (including annual accounts such as yearly salary) or member values based on another member.

To spread data, you can use:

- A predefined spread type, such as `Spread_Average`, `Spread_Balance`, `Spread_First`, `Spread_Flow`, `Spread_445`, `Spread_454`, `Spread_544`, `Spread_Actual_365`, and `Spread_Actual_Actual`. If you delete the spread type members, calculations based on them do not work.

  Example: `Salary = "Annual Salary" * Spread_445`

- The time balance spread formula expression, `[TimeBalanceSpread]`. This formula expression returns the spread type member based on the account's Time Balance spreading property. It relies on the predefined System Members, which are only available to Workforce Planning applications.

  Example: `Salary = "Annual Salary" * [TimeBalanceSpread]`

Note: Oracle recommends using the time balance spread formula expression so that changes to your outline do not affect Workforce Planning calculations.

Employee Dimension

Subtopics

- About Working with Employees
- Changing the Number of Hiring Requisitions

The Employee dimension is the driving force of Workforce Planning, storing both Existing Employees (optionally, by Employee ID, Name, or both) and New Employees. The Employee dimension should be organized by a logical grouping instead of importing a long flat dimension. For example, you can organize the Employee dimension based on employees' last names or by the first digit of their ID. Organize the employee members to best meet your company's needs, and then regularly update the Employee dimension to keep it current with the HRMS.

After the Employee dimension is populated with the existing employees, employee properties (such as Annual Salary, Grade, FT/PT, and FTE) can be loaded into the corresponding Account members. These properties are used in compensation-related calculations such as Salary, Merit, Bonus, and Health Benefits. Furthermore, many of the accounts depend on another property. You can customize and add employee properties to meet your organization's needs. See "Account Dimension" on page 25.

The Employee dimension includes 100 Hiring Requisition members that are used in planning New Hires. To add more requisitions, see "Changing the Number of Hiring Requisitions" on page 28.

Note: Having Employee IDs or Names in the Employee dimension does not mean that anyone can see compensation information about any employee. Access permissions set to accounts, entities, and forms restrict access to compensation information to only those users who were granted access. See "Securing Applications" on page 19.

You can plan expenses by individual employees or by departments. Department expenses which not associated with specific employees, include items such as printers, telephone, and furniture. You can use the Department General Employee member to plan for expenses charged to departments.

About Working with Employees

Planners can change employee status from a shortcut menu. Business rules are used to transfer employees to a different department or to make other changes to employees.

After the Employee dimension is populated with the existing employees, employee properties can be loaded into Workforce Planning to begin the planning process. Employee properties are stored in Account members such as Annual Salary, Grade, FT/PT, FTE, and so on. These properties are used in compensation-related calculations such as Salary, Merit, Bonus, and

Health Benefits. Some employee properties are supported in Smart Lists. Many accounts depend on another account or on a property, for example, FT/PT. You can customize employee properties to meet your organization's needs, such as adding employee properties to the application, and then adding grades or performance ratings.

See "Account Dimension" on page 25 and "Employee Dimension" on page 27.

Changing the Number of Hiring Requisitions

Workforce Planning includes 100 Hiring Requisition members in the Employee dimension to enable each department to add 100 new hires to their organization each year. Each department can add 100 new hires per job during the current plan year, 100 more next year, and so on for subsequent years. You can change the number of Hiring Requisitions for each department by adding or deleting Hiring Requisitions members on the **Dimensions** tab or by using the procedures described in "Adding Hiring Requisitions" on page 44 and "Removing Hiring Requisitions" on page 45.

Note: Oracle recommends monitoring the number of Hiring Requisitions to reflect the organization's needs.

Job Dimension

The Job dimension is used in conjunction with the Employee dimension to track employees by role. Ensure that all the roles assigned to employees in your organization are members of the Job dimension. When importing employee data from the HRMS, import the data at the correct intersection of the Job and Employee.

Forms

When you make changes to forms in your application, be sure that changes are synchronized with business logic such as business rules, member formulas, and dimensional outline. Whenever you modify your business logic, you should check your forms.

Smart Lists

Smart Lists are used in Workforce Planning to store several employee properties that drive calculations and enable users to manage their employees. For example, the Employee_Type Smart List includes Temporary, Regular, and Contractor values.

Workforce Planning provides the following Smart Lists:

Table 4 Predefined Smart Lists

Smart List Name	Description
Approval Status	Used in the approval process of hiring requisitions

Smart List Name	Description
BonusPayment	Indicates the month a bonus is paid
Employee Type	Regular, Temporary, or Contractor
FT/PT	Identifies whether employees work full time or part time. This Smart List is leveraged in calculations.
Grade	Indicates an employee's pay grade
Health Plan	Used in employee benefits calculations
Month	Indicates all the months in the year, used in calculations for New Hires and Merit Increase
Pay Type	Exempt or Non Exempt
Performance	Indicates an employee's performance rating. This Smart List is leveraged in Bonus and Merit calculations.
Salary Basis	Identifies employee pay type—Annual or Hourly, used in Salary and Overtime calculations
Skill Set	Informational field to indicate an employee's area of expertise
Status	Active, Disability, Leave of Absence, Maternity, On Sabbatical. Many calculations are tied to an employee's Status.
Tax Region	Used in calculating Employee Tax. Workforce Planning provides two default members: USA and None. To calculate employee taxes in other tax regions, update the Tax Region Smart List to include those additional regions. In addition, you must modify the Employee Taxes member formula to calculate the added region.

If you add a Smart List, see "Adding Smart Lists or Menus" on page 29.

Menus

Workforce Planning includes shortcut menus that drive calculations on forms. The shortcut menus either display another form or launch a business rule to perform a calculation. The shortcut menus that are displayed depend on the form settings, access permissions to the form and its associated business rules, and where you right-click in the form.

Adding Smart Lists or Menus

For Smart Lists and shortcut menus, Workforce Planning provides predefined labels that are set as resource strings in the `HspCustomMsgs` template file.

If you add Smart Lists and shortcut menus to your application, you should add corresponding labels to the `HspCustomMsgs` file. You should also update the file whenever you modify the predefined Smart Lists or menus.

You can localize the labels in your application by updating the localized versions of the `HspCustomMsgs` file. For instructions on modifying labels or preparing files for localization, see "Customizing Planning Web Client" in *Oracle Hyperion Planning Administrator's Guide*.

Note: Modifying the `HspCustomMsgs` file overrides default values installed with Workforce Planning or creates new values.

After you enter data based on Smart List values, any calculations based on the Smart Lists may not be correct if the lists change. You may need to adjust data in the database to reflect the new values. You can delete predefined shortcut menus without affecting predefined calculations.

Member Formulas

Workforce Planning leverages member formulas to calculate many components of employee compensation, including Annual Salary, Merit, Bonus, Taxes, and others. Administrators should review the member formulas and become familiar with them. Many member formulas are closely tied, where one formula depends on the result of another formula. Before you change or modify an Account member, ensure that you understand the dependencies among member formulas. For example, changing account names could affect the member formulas. In addition, deleting members in the Account dimension could remove functionality, so be cautious about deleting Account members (see "Account Dimension" on page 25). Before making changes, you must fully understand the model and the dependency among its artifacts.

Workforce Planning member formulas include formula expressions, such as `[TimeBalanceSpread]`. Oracle recommends that you include formula expressions when you write new formulas. Making formulas independent of the outline enables calculations to work if you change the outline.

See the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide* or help system.

Business Rules

Planners use business rules to perform calculations on employee data, such as:

- Adding new employees to departments. For example, planners use the Add Hourly or Add Salary business rule to add new hires to departments.
- Changing employee status. For example, when employees take a leave of absence, planners use the Change Employee Status business rule to change the employee's status from Active to Leave of Absence.
- Transferring employees in and out of departments. For example, when employees change departments, planners use the Transfer business rule to move employees out of the old departments and into the new departments.

Administrators manage business rules and can view the content of predefined Workforce Planning business rules. In Planning, administrators associate business rules with shortcut menus and forms, and set properties for business rules (see the *Oracle Hyperion Planning Administrator's Guide*). Planners and other users launch business rules to set and calculate employee data on forms (see the *Oracle Hyperion Planning User's Guide*).

UDAs

Workforce Planning includes one predefined UDA called ACTUAL, which flags the Actual scenario and ignores member formulas, preventing actual data from being overwritten.

Note: Member formulas do not calculate data in any scenario that has the ACTUAL UDA assigned. Before or after initializing Workforce Planning, assign the ACTUAL UDA to the scenario that is used to store actuals data.

See the *Oracle Hyperion Enterprise Performance Management Architect Administration Guide* and the *Oracle Essbase Database Administrator's Guide*.

Workforce Administration Task List Tasks

1. Set global rates for employees, such as salary midpoints by grade, employee benefits assumptions, default working days and hours, and standard hourly rates.

   See "Setting Global Rates for Employees" on page 31.

2. Import employees and refresh the application.

   See "Importing Employees" on page 33.

3. Calculate employee compensation.

   See "Calculating Employee Compensation" on page 33.

Viewing the Workforce Administration Task List

➤ To access the **Workforce Administration** task list:

1 Launch Workforce Planning.

   See "Logging On and Accessing Workforce Planning" on page 21.

2 In the left panel, expand **My Task List.**

3 Expand **Workforce Administration.**

4 **Optional**: To launch a task from the task list, to the right of the task under the **Action** column, click **Launch Tasklist Wizard** .

Setting Global Rates for Employees

Global rates are used in various calculations to derive costs. These assumptions are often set at a high level and, for certain assumptions, can be changed at a lower level. This task enables you to set midpoint salaries by grade, employee benefits assumptions, default working days and hours, and standard hourly rates. For information on how global rates are used in compensation calculations, see "Workforce Assumptions" on page 24.

➤ To set global rates for the workforce:

1 **Under the Workforce Administration task list, select Set Global Rates.**

  See .

2 **Complete the 9.00 WFP Set Rates composite form.**

  Notes:

  - The administrator adds grade values on the **Set Mid Salary Compensation Assumptions** form. Grade values are factored into salary rate calculations. For information on deleting or adding grade levels, see "Adding Grade Levels" on page 32.
  - The data that you enter on the **Set Employee Benefits Assumptions** form is used for driving such calculations as annual salary increases, merit increases, health care costs, and bonuses.
  - The data that you enter on the **Set Default Working Days and Hrs** form is used in employee salary and overtime calculations.

Adding Grade Levels

Workforce Planning includes 1 grade levels, Grade 1. You can delete or add grade levels. Oracle assumes that you initially populate the Grade Smart List with the grade level values from your company's HRMS (see "Initial Implementation Tasks" on page 17). Use this procedure to manually add a grade level.

➤ To add a grade level:

1 **In the Grade Smart List, add a Smart List entry for the new grade level.**

2 **In the Account dimension, expand the Workforce Planning - Accounts member, the Assumption Input member, and then add the new grade under the Average Salary by Grade member.**

  Workforce Planning calculations now include the new grade level.

3 **If you add a grade level: For each new grade level that you added, enter an alias into the CalcLogic alias table so that the calculations work automatically.**

  The CalcLogic alias syntax is `Grade -n`, where `n` is the new level.

For instructions on working with Smart Lists, dimensions, and alias tables, see the *Oracle Hyperion Planning Administrator's Guide*.

Defining Alias Tables for New Hire Salary Grades

In order to assign salary grades for new hires and be hired employees, perform these steps:

- Create an alias table, and define aliases in the format of (Grade -n) for members in Average Salary by Grade in the Account dimension. For example, Grade -1, Grade -2, and so on.
- Refresh the database.

Refresh the database. For information about using alias tables, see “Working With Alias Tables” in the Hyperion PlanningAdministrator's Guide.

Importing Employees

You typically start workforce plans by loading employee data from your company's source HRMS. See:

- “Initial Implementation Tasks” on page 17.
- “Employee Dimension” on page 27
- *Oracle Hyperion Planning Administrator's Guide*

After updating employee information, synchronize the application with Oracle Essbase by refreshing the application. For instructions, see the *Oracle Hyperion Planning Administrator's Guide*.

Calculating Employee Compensation

To see the total compensation for an entity, run the Calculate Compensation For All Employees business rule, associated with the **Calculate Compensation** task. This business rule calculates employee compensation by entity, based on expense data. You can execute the Calculate Compensation For All Employees business rule in a batch process after loading employee data from the source HRMS or after you plan resources for an entity.

➤ To calculate employee compensation:

1. Expand **Workforce Administration** and then select **Calculate Compensation.**

   See “Viewing the Workforce Administration Task List ” on page 31.
2. On Calculate Compensation For All Employees, click **Launch.**
3. In **Calculate Compensation For All Employees**, ensure that values are selected for all elements.
4. Click **Launch.**

Note: For information about creating a runtime prompt values file so it can be used with the `CalcMgrCmdLineLauncher.cmd` utility, see the *Oracle Hyperion Planning Administrator's Guide*.

What's Next?

After setting up your application and loading employee data, you can:

- Customize task lists for planners to further guide users in the planning process.
- Customize your Workforce Planning application to accommodate any of your company's special requirements.

4 Planning Workforce

In This Chapter

About Planning Workforce

The **Workforce Planning** task lists enable managers to model future employee-related expenses and headcount. Working with up-to-date information on departmental workforce expenses enables managers to focus on planning for the future and apply various business assumptions.

For example, using the **Workforce Planning** task lists, managers can plan for new hires, transfer employees, plan departures or merit increases, associate an employee to a hiring requisition, change an employee's job, and so on.

Process

Planners who manage workforce plans focus on reviewing information for the employees in their department (or cost center), verifying their salaries, updating employee properties such as full time or part time, and updating other compensation assumptions such as bonuses and merit increases. By default, Workforce Planning calculates all compensation components for existing employees for managers, so managers can focus on reviewing existing employees for changes. After managers review and update existing employee information, they plan for new hires. After planning all new hires, managers can run the Calculate Compensation business rule for their entire organization to get an updated plan or forecast for total compensation, headcount, and FTE. Additionally, Workforce Planning enables managers to determine compensation expenses for their organization for future years and to submit their plan for approval.

Workforce Planning Task List Tasks

1. Manage existing employees, such as reviewing their status, applying salary adjustments, and calculating compensation.

   See "Updating Existing Employees" on page 37.

2. Review existing employees by job.

   See "Review Existing Employees by Job" on page 43.

3. Add new hires.

   See "Adding New Hires" on page 43.

4. Calculate compensation.

   See "Calculating Compensation" on page 42.

5. Review total employee compensation.

   See "Reviewing Total Employee Compensation" on page 47.

6. Calculate future years compensation expense.

   See "Calculating Future Years Compensation" on page 47.

7. Submit the plan for approval.

   See "Submitting the Plan for Approval" on page 48.

Viewing the Workforce Planning Task List

➤ To view the **Workforce Planning** task list:

1. Launch Workforce Planning.

   See "Logging On and Accessing Workforce Planning" on page 21.

2. In the left panel, expand **My Task List.**
3. Expand **Workforce Planning.**
4. **Optional**: To launch a task from the task list, to the right of the task under the **Action** column, click **Launch Tasklist Wizard** .

Updating Existing Employees

Subtopics

The **Existing Employees** task list enables you to review employees, change employee status, review and update employee compensation, and calculate compensation.

Reviewing Existing Employees

This task enables you to review and update, for each employee in the entity, information such as salary, merit increases, and working hours. Here, you ensure that employees are correctly assigned to cost centers and that the information that was loaded from the HRMS is correct. If the information is correct, use this task to make adjustments such as salary increases.

The Review Existing Employees master details form displays existing employee details in the top form; employee expenses summary and employee status information is displayed in the bottom form.

➤ To review existing employees:

1. **Navigate to the Workforce Planning task list.**

   See "Viewing the Workforce Planning Task List" on page 36.

2. **Select Existing Employees.**

3. **Review the Review Existing Employees master details form.**

   On this form, review and update:

   - **Salary Rate**—The amount the employee makes per hour or per year
   - **Hours per Week**—The hours worked per week.
   - **Working Days**—The number of days worked in a year
   - **Employee Type**—**Regular**, **Contractor**, **Temporary**, or **None**.
   - **Grade**—The grade level.
   - **FTE**—A combination of employee and job. For example, an FTE of 0.5 indicates that the person is employed in the job only half-time.
   - **FT**—**FT** Full time or **PT** part time
   - **Pay Type**—**Exempt** or **Non-exempt**

- **Merit Month**—The month in which a merit increase is given.
- **Start Month**—The month the employee began employment in the assigned job.
- **Tax Region**—The employee's tax region
- **Skill Set**—If the Skill Set Smart List has values, select it from the list.
- **Health Plan**—**Individual**, **Individual+1**, or **Family**
- **Performance**—The employee's performance rating
- **Recommended Merit %**—Percentage merit increase
- **Override Merit %**—The merit increase percentage that overrides the input or calculated merit percentage.

4 **From the form, use the shortcut menus to change employee status, transfer employees, plan an employee's departure, and calculate compensation.**

- See "Changing Employee Status" on page 38.
- See "Changing a Job" on page 39.
- See "Transferring Employees" on page 39.
- See "Planning an Employee's Departure" on page 42.
- See "Calculating Compensation" on page 42.

Changing Employee Status

Sometimes you must plan for employee status changes, such as someone taking a leave of absence or going away on maternity leave. The Change Employee Status menu option facilitates making such changes.

➤ To change an employee's status:

1 **Open the Review Existing Employees form.**

See "Reviewing Existing Employees" on page 37.

2 **Right-click the employee in the upper portion of the form, and then select Change Employee Status.**

3 **Update the Change Existing Employee Status form.**

For **Action**, select one:

- **Active**
- **Disability**
- **Leave of Absence**
- **Maternity**
- **On Sabbatical**

Note: If you change an employee's status from **Active** to **Disability** or **On Sabbatical**, the salary calculation for that month is unaffected. If you change the status to **Leave of Absence**, the salary is not calculated for that duration. If you change the status to **Maternity**, the salary is calculated as `(Salary % - Maternity Leave) * (Original Salary)`, for the duration in which the status is set to maternity. **Salary % - Maternity Leave** is set on the **Set Employee Benefits Assumptions** form. See "Setting Global Rates for Employees" on page 31.

4 Click **Change Employee Status.**

Changing a Job

When planning for the future, managers can change the job associated with an employee by using the Change Job shortcut menu option. Doing so enables managers to assign a new role to an employee and move all salary and other compensation expenses to the new job, as of the specified starting period.

➤ To change employee jobs:

1 Open the **Review Existing Employees** form.

See "Reviewing Existing Employees" on page 37.

2 Right-click the employee in the upper portion of the form, and then select **Change Job.**

3 Select one

- **Employees**
- **Start Month**
- **Enter FTE**
- **Source Job**
- **Target Job**
- **Grade**
- **Hours per week**

4 Click **OK.**

This launches the Change Job business rule.

5 To recalculate expenses, right-click and then select **Calculate Compensation.**

6 Click **OK.**

Transferring Employees

Transferring an employee changes the department (or entity) against which their compensation expenses are calculated. Managers transfer employees using shortcut menu options. Depending on your business needs, employees can be transferred in two steps using the Transfer Out and Transfer In shortcut menu options, or in one step using the Transfer shortcut menu option.

The two-step transfer process provides security; it ensures that a manager in Department A cannot see member data for Department B without access permissions. The owner of Department A should transfer out an employee during the same month in which the owner of Department B transfers in the employee.

Planners can use a one-step transfer process if security is not an issue (that is, the planner has access permissions to the source and target entities involved in the transfer). The Transfer shortcut menu option transfers employees out of one department and into another in one step.

➤ To transfer employees:

1 **Open the Review Existing Employees form.**

See "Reviewing Existing Employees" on page 37.

2 **Right-click the employee in the upper portion of the form, and then select Transfer Employees.**

3 **Select an option:**

- **Transfer In**—Runs the Transfer In business rule, which transfers the employee into the new department. Select options for the transferring employee.
    - **Department**—The department into which the employee is transferred.
    - **Select Job**—The job to which the employee is assigned in the target department.
    - **Existing Employee**—The transferring employee.
    - **Employee Type**—**Regular**, **Contractor**, **Temporary**, or **None**.
    - **Enter FTE**—A combination of employee and job. For example, an FTE of 0.5 indicates that the person is employed in the job only half-time.
    - **Month**—The month in which the employee transfers.
    - **Year**—The year in which the employee transfers.
    - **Salary Basis**—**Annual** or **Hourly**.
    - **Grade**—The employee's grade level.
    - **Salary Rate**—The amount the employee makes per hour or per year.
    - **Hours per Week**—The hours worked per week.
    - **Pay Type**—**Exempt** or **Non-exempt**.
    - **Health Plan**—**Individual**, **Individual+1**, or **Family**.
    - **Merit Month**—The month in which a merit increase is given.
    - **Tax Region**—The employee's tax region.
- **Transfer Out**—Runs the Transfer Out business rule, which transfers the employee out of the current department. Select options for the transferring employee.
    - **Department From**—The department from which the employee is transferred.
    - **Existing Employee**—The transferring employee.
    - **Month**—The month in which the employee transfers.
    - **Year**—The year in which the employee transfers.

- ❍ **Comments**—Optional comments.
- **Transfer**—Runs the Transfer business rule, which transfers the employee out of one department and into another in one step.

4 **Click Transfer.**

After an employee is transferred out, employee 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.

Note: Planners can transfer an employee into a department even if the employee is already in the department, which is useful when planners want to change the transfer-in date. You cannot, however, transfer an employee into and out of the same department in the same month.

➤ To use the two-step employee-transfer process:

1 **Run the Transfer Out business rule to transfer the employee out of the current department.**

The Transfer Out business rule clears the Action account after the transfer out month. Transfer out causes the employee's name to be displayed in the **Review Pending Transfers** task.

2 **From the Workforce Planning task list, select Review Pending Transfers.**

3 **To transfer the employee into the destination department, select the employee, right-click, and then select Transfer In.**

The Transfer In business rule clears the Action account before the transfer in month.

Tip: Oracle recommends that administrators review pending transfers before approving a plan. See "Reviewing Pending Transfers" on page 41.

Reviewing Pending Transfers

When an employee is transferred out of a department using the two-step employee-transfer process:

After an employee is transferred out of a department, and before the employee is transferred into the destination department, the receiving manager can view pending transfers and then select Transfer In to move the employee into their department.

Undoing a Transfer

To undo the action for Transfer Out or Transfer In, planners change the Action value in the form back to the desired value. In most cases, the desired value is `#missing`.

To undo the Transfer business rule, planners can launch the business rule again, using the same settings but reversing the order of the departments for transfer.

While no other information is changed or cleared, other accounts are based on the Action account, so transfers can cause a ripple effect when other accounts are calculated. For example, Action drives Status, which drives Salary, which drives Total Salary, which drives Taxes and Total Compensation. Total Compensation + Taxes drives Expenses, and so on.

Planning an Employee's Departure

Perform this task to plan employee departure.

➤ To plan employee departure:

1 **Open the Review Existing Employees form.**

See "Reviewing Existing Employees" on page 37.

2 **Right-click the name of the employee in the upper portion of the form, and then select Plan Departure.**

3 **In Plan Departure, specify or select values:**

- **Department From**
- **Existing Employee**
- **Year**
- **Month**
- **Action**—Select **Departed** (for terminated employees) or **Resigned**
- **Comments**

4 **Click OK.**

Note: If necessary, bonuses can be made after employees are terminated.

To correct an employee termination error, click the form cell containing the Departed value, and then press Delete to remove the value. If an employee was on a non-active status such as Sabbatical when they were terminated, planners must manually change the status after undoing a termination.

Calculating Compensation

The **Calculate Compensation** task and shortcut menu option calculates all employee-related compensation expenses, including Salary, Merit, Bonus, Other Benefits, and Taxes. Before you launch this shortcut menu option, make all your employee updates, for example, changes to employee benefit assumptions, employee transfers, and employee status. Then, when running the Calculate Compensation shortcut menu option, you see total compensation expenses by employee.

➤ To calculate employee compensation:

1 **Open the Review Existing Employees form.**

See "Reviewing Existing Employees" on page 37.

2 **Right-click the name of the employee in the upper portion of the form, and then select Calculate Compensation.**

This action launches the Calculate Compensation business rule.

3 **Click OK.**

Review Existing Employees by Job

From the **Workforce Planning** task list, select **Existing Employees by Job** to review and analyze your departments' staffing by job. This enables you to see how many employees in are performing certain jobs. From the form, planners can update information, including changing an employee's job (see "Changing a Job" on page 39). They can also update total expenses by using the Calculate Compensation shortcut menu (see "Calculating Compensation" on page 42).

Adding New Hires

When workforce demands exceed the number of available employees, managers can use the **Add New Hires** task to add a hiring requisition to be filled by an employee, remove hiring requisitions, change the status of a hiring requisition, calculate compensation, and associate a hiring requisition with an employee.

The **Add New Hires** master details form displays new hire request details in the top form; the Employee Expense Summary is displayed in the bottom form.

Tip: To filter the data in a simple form that is relevant to the data in a master composite form, right-click the master composite form and select **Apply Context**. For example, in the New Hire Request form, you can select **Apply Context** to review the Employee Expense summary for a combination of Job and Employees in the top form.

➤ To add new hires:

1 **Create an alias table, define aliases in the format of (Grade -n) for Average Salary by Grade members in the Account dimension, and then refresh the database.**

This enables you to assign a salary to new hires. See "Working With Alias Tables" in the *Oracle Hyperion Planning Administrator's Guide*.

2 **From the Workforce Planning task list, select Add New Hires.**

3 **Complete the 3.00 New Hire Request master details form.**

4 **From the New Hire - Request tab, use the shortcut menus to add hiring requisitions, calculate compensation, and change requisition status.**

- See “Adding Hiring Requisitions” on page 44.
- See “Calculating Compensation” on page 42.
- See “Changing Hiring Requisition Status” on page 46.
- See “Removing Hiring Requisitions” on page 45.
- See “Associating Employees to Hiring Requisitions” on page 45.

Adding Hiring Requisitions

This task adds hiring requisitions to be filled by employees hired in the future.

➤ To add hiring requisitions:

1 Open the **Add New Hires** composite form.

See “Adding New Hires” on page 43.

2 Right-click the **New Hire - Request** form, and then select **Add Hiring Requisitions.**

3 Select **Salary** or **Hourly.**

4 In **Add Hiring Requisitions**, specify or select the settings that apply for the requisition:

- **Select Job**—The job associated with the open job
- **Employee Type**—**Regular**, **Contractor**, or **Temporary**
- **Number of Requisitions**—The number of requisitions needed. A row is created for each requisition.
- **Enter FTE**—The full-time equivalent for the job. For example, an FTE of .5 means the job is for a half-time employee.
- **Year/Start Month**—The year and starting month of the requisition
- **Grade**—The grade of the requisition
- **Market Adjustment**—Mid Point Salary Rates by Grade is used in calculating the compensation for new hires. When the Mid Point Salary is not enough to offer a prospective employee (perhaps because of geographic differences or a skill set is difficult to find), specifying a market adjustment value enables you to indicate how much over the Mid Point Salary is needed to hire for a job.
- **Pay Type**—**Exempt** or **Non-exempt**
- If you selected **Hourly** in step 3: **Hours per week**—Enter the hours worked per week.
- If you selected **Hourly** in step 3: **Salary Rate**—The compensation rate
- **Health Plan**—**Individual**, **Individual+1**, or **Family**.
- **Tax Region**—**USA** or the applicable region.

  Note: To add a Tax Region, you must update the Tax Region Smart List. See “Smart Lists” on page 28.

- **Comments** (optional)

5 **Click Add.**

Removing Hiring Requisitions

Use this procedure to remove a hiring requisition that is no longer required or to remove one mistakenly added.

➤ To remove hiring requisitions:

1 **Open the Add New Hires composite form.**

See “Adding New Hires” on page 43.

2 **From the New Hire - Request form, right-click the requisition.**

3 **Select Remove Hiring Requisition.**

4 **Click OK to confirm the deletion.**

Associating Employees to Hiring Requisitions

The Associate Employee shortcut menu option enables managers to associate a hiring requisition to an employee after: the employee is hired and their corresponding record created in the HRMS and loaded or manually created in Workforce Planning as a member of the Employee dimension. Managers also use Associate Employee to fill a hiring requisition with an existing employee who is already present in the application (for example, through a previous load process).

Whether Job data is loaded for an employee affects the Reconciled FTE and Reconciled Headcount calculations:

- Case 1:

  The Employee member is created in the HRMS and loaded into the application, but has no data on the Job against which the hiring requisition exists. In this case, Associate Employee copies all the data from the hiring requisition to the employee and tracks the number of employees associated to the hiring requisition through the Reconciled Headcount and Reconciled FTE forms. The Reconciled FTE value and the Reconciled Headcount are each incremented by 1. When a hiring requisition is created in the system, the Reconciled FTE and Reconciled Headcount will have no value.

- Case 2:

The Employee member is created in the HRMS and loaded into the application, along with all employee data such as FTE, Compensation, and so on, for the Job against which the hiring requisition exists. In this case, the FTE of the employee is added to the Reconciled FTE against the hiring requisition. Reconciled Headcount is incremented by 1. In calculations, the compensation for the hiring requisition is FTE minus Reconciled FTE.

Note: Workforce Planning does not allow the same employee to be associated to a hiring requisition more than once.

➤ To associate an employee to a hiring requisition:

1 **Open the Add New Hires composite form.**

See "Adding New Hires" on page 43.

2 **In the New Hire - Request form, right-click the requisition, and then select Associate Employee.**

3 **Select the employee and the hiring requisition to which to associate the employee.**

4 **Click OK.**

Changing Hiring Requisition Status

Using the Change Requisition Status shortcut menu option, managers can adapt to organizational requirements by changing the status of hiring requisitions to Approve, Reject, Postpone, or Cancel. The hiring requisition status is set to New when a request is made. After requests are submitted for approval, the approving authority must change the status of individual requests before promoting the plan through the Approvals process.

➤ To change the status of a hiring requisition:

1 **Open the Add New Hires composite form.**

See "Adding New Hires" on page 43.

2 **Right-click the New Hire - Request form, and then select Change Requisition Status.**

3 **In Change Requisition Status, select the settings that apply:**

- **Select Job**—The job you are changing
- **Hiring Requisitions**—The hiring requisition number
- **Enter Status**—Select an option:
  - **Approved**—The requisition is approved. The hiring manager can hire a new person for the organization.
  - **Unapproved**—The requisition is rejected or not approved. The hiring manager cannot hire a new person for the organization.
  - **On-hold**—The requisition is postponed or must be put on hold.
  - **Closed**—The requisition is completed or is canceled.

4 **Click OK.**

Calculating Compensation

To see the total compensation for an entity, run the Calculate Compensation For All Employees shortcut menu option, associated with the **Calculate Compensation** task. This shortcut menu option calculates employee compensation by entity, based on expense data. You can execute the Calculate Compensation For All Employees shortcut menu option in a batch process after loading employee data from the source HRMS or after you plan resources for an entity.

➤ To calculate compensation for all employees:

1 From the **Workforce Planning** task list, select **Calculate Compensation.**

See "Viewing the Workforce Planning Task List" on page 36.

2 On Calculate Compensation For All Employees, click **Launch.**

Note: For information about creating a runtime prompt values file so it can be used with the `CalcMgrCmdLineLauncher.cmd` utility, see the *Oracle Hyperion Planning Administrator's Guide.*

Reviewing Total Employee Compensation

The **Review Total Employee Compensation** task displays the total compensation expenses for all employees by account. The bottom form summarizes the Total Compensation by employee and includes details of their compensation.

➤ To review total employee compensation:

1 From the **Workforce Planning** task list, select **Review Total Employee Compensation.**

See "Viewing the Workforce Planning Task List" on page 36.

2 Review the **4.16 Total Employee Compensation** form.

Calculating Future Years Compensation

The **Calculate Future Years Compensation** task enables managers to determine compensation expenses for their organization for future years. You select the year on which to base compensation and predict future compensation. The calculation assumes a merit increase for each year that is entered in the global assumptions.

➤ To calculate future years compensation:

1 From the **Workforce Planning** task list, select **Calculate Future Years Compensation.**

See "Viewing the Workforce Planning Task List" on page 36.

2 Click **Launch** to run the Calculate Future Year Compensation Expense business rule.

3 In **Calculate Future Year Compensation Expense**, specify or select the settings that apply to your organization:

- **Department**—The entity for which to calculate future compensation
- **Scenario**—The scenario for which to calculate future compensation
- **Version**—The version for which to calculate future compensation
- **Select Base Year**—The year on which to base compensation

- **Select Future Year**—The last year on which to predict compensation. For example, if you select 2013 as the Base Year and 2016 as the Future Year, Workforce Planning predicts compensation for years 2014, 2015, and 2016.
- **Override Existing Data**:
  - **Yes**—Select if you want all compensation data that was entered in the selected future years for an employee to be overwritten and recalculated.
  - **No**—Select if you do not want data that was specifically entered for an employee in the selected future years to be overwritten.

4 Click **Launch.**

Note: For information about creating a runtime prompt values file so it can be used with the `CalcMgrCmdLineLauncher.cmd` utility, see the *Oracle Hyperion Planning Administrator's Guide*.

Submitting the Plan for Approval

Corporate planners, operational managers, or department managers prepare the workforce plans, sometimes including multiple scenarios. They submit them to senior financial and Human Resource managers for review and approval. A corporate planner typically consolidates the plan and prepares reports about the workforce. Companies can modify plans when necessary to respond to changing conditions.

After planning your workforce requirements, submit the plan for approval.

➤ To submit a plan for approval:

1 From the **Workforce Planning** task list, select **Submit Plan for Approval.**

See "Viewing the Workforce Planning Task List" on page 36.

2 Submit the plan for approval using Oracle Hyperion Planning's approvals functionality.

See Chapter 10, "Managing Planning Units" in the *Oracle Hyperion Planning User's Guide*.

5 Performing Workforce Analysis

In This Chapter

About Workforce Analysis

Workforce analysis helps managers review employee compensation, FTE, and headcount. It also enables them to graphically view aggregated data at the entity level and view the detailed data.

Process

Workforce Planning provides a set of forms that enable managers to analyze their organization's compensation, FTE, and headcount.

Workforce Analysis Task List Tasks

1. Review total compensation.

   See "Reviewing Total Compensation" on page 50.

2. Review a graphical summary of employee headcount and FTE.

   See "Viewing Headcount and FTE Graphically" on page 50.

3. Review the numerical details of employee headcount and FTE.

   See "Viewing Headcount and FTE Data" on page 51.

Viewing the Workforce Analysis Task List

➤ To view the **Workforce Analysis** task list:

1 Launch Workforce Planning.

See “Logging On and Accessing Workforce Planning” on page 21.

2 In the left panel, expand **My Task List.**

3 Expand **Workforce Analysis.**

4 **Optional**: To launch a task from the task list, to the right of the task under the **Action** column, click **Launch Tasklist Wizard** .

Reviewing Total Compensation

The **Compensation Analysis** task enables managers to review employee compensation totals for their organization.

➤ To review total compensation:

1 Under the **Workforce Analysis** task list, select **Compensation Analysis.**

See “Viewing the Workforce Analysis Task List” on page 50.

2 Review the **Total Employee Compensation** form.

The top form displays the summary compensation data in graphical form. The bottom form displays the summary numerical data. You can view summary data for the selected entity, scenario, or version.

Viewing Headcount and FTE Graphically

The **FTE and Headcount Analysis** task enables managers to graphically analyze total *FTE (full-time equivalent)*s and *headcount* for their organization.

➤ To review employee headcount and FTE:

1 Under the **Workforce Analysis** task list, select **FTE and Headcount Analysis.**

See “Viewing the Workforce Analysis Task List” on page 50.

2 The top of the FTE and Headcount Analysis form graphically displays the total FTE and headcount by month and the Regular versus Contractor FTE. The form bottom displays the numerical totals for FTE and headcount.

Viewing Headcount and FTE Data

The **Review Employee Headcount and FTE** task enables managers to review numerical data on *FTE (full-time equivalent)*s and *headcount* for their organization.

➤ To review employee headcount and FTE:

1 **Under the Workforce Analysis task list, select Review Employee Headcount and FTE.**

See "Viewing the Workforce Analysis Task List" on page 50.

2 **The 4.15 Headcount and FTE form displays the numerical FTE and headcount by month.**

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Account Dimension Members

This table describes the Account dimension members that store Workforce Planning data.

Table 5 Account Dimension Members

Member	Input, Load, or Calculation	Description	Dependency
SSTax Rate1 Input	Input	Application-level Assumptions	
SSTax Cap Input	Input	Application-level Assumptions	
Medicare Rate Input	Input	Application-level Assumptions	
FUTA Rate Input	Input	Application-level Assumptions	
FUTA Cap Input	Input	Application-level Assumptions	
SUI Rate Input	Input	Application-level Assumptions	
SUI Cap Input	Input	Application-level Assumptions	
SSTax Rate2 Input	Input	Application-level Assumptions	
Health Care Rate - Individual	Input	Entity-level Assumptions. Stores monthly health care costs by plan	
Health Care Rate - Individual +1	Input	Entity-level Assumptions. Stores the monthly health care cost by plan	
Health Care Rate - Family	Input	Entity-level Assumptions. Stores the monthly health care cost by plan	
Merit Rate - Fails to Meet Expectations	Input	Entity-level Assumptions. Stores the recommended Merit Rate based on substandard employee performance	
Merit Rate - Needs Improvement	Input	Entity-level Assumptions. Stores the recommended Merit Rate based on substandard employee performance	
Merit Rate - Meets Expectations	Input	Entity-level Assumptions. Stores the recommended Merit Rate based on acceptable employee performance	
Merit Rate - Exceeds Expectations	Input	Entity-level Assumptions. Stores the recommended Merit Rate based on good employee performance	

Member	Input, Load, or Calculation	Description	Dependency
Merit Rate - Far Exceeds Expectations	Input	Entity-level Assumptions. Stores the recommended Merit Rate based on excellent employee performance	
Bonus Target - Grade 1 through to Grade 13	Input	Target bonus % for the grade - Entity-level Assumptions	
Bonus Rate - Fails to Meet Expectations	Input	Bonus Multiplier based on performance rating that calculates the bonus rate given a substandard employee performance. Entity-level Assumptions	
Bonus Rate - Needs Improvement	Input	Bonus Multiplier based on Performance Rating that calculates additional bonus based on substandard employee performance. Entity-level Assumptions	
Bonus Rate - Meets Expectations	Input	Bonus Multiplier based on Performance Rating that calculates additional bonus based on acceptable performance. Entity-level Assumptions	
Bonus Rate - Exceeds Expectations	Input	Bonus Multiplier based on Performance Rating. This will be used to calculate additional bonus based on good performance. Entity-level Assumptions	
Bonus Rate - Far Exceeds Expectations	Input	Bonus Multiplier based on Performance Rating that calculates additional bonus based on excellent performance. Entity-level Assumptions	
Grade -1 through Grade 15	Input	Annual Salary for the Grade. Entity-level Assumptions	
Comments	Input	Stores users notes or comments	
Employee Type	Input or load	Indicates that an employee is regular, as opposed to contract	Employee Type
Pay Type	Input or load	Indicates employee salary type (hourly or annually)	

Member	Input, Load, or Calculation	Description	Dependency
FT/PT	Input	Indicates if an employee is full-time or part-time	• FTE • FT & PT • Hours per week • Salary Basis
Headcount	Input or load	Number of employees available to be assigned to jobs	
Merit Month	Input or load	Month in which an employee is due a Merit Raise. Used in merit calculations	
Start Month	Input or load	Employee start month. This information is used in the Add TBH rule to identify when new hires should start being paid	
Grade	Input or load	Employee grade. Used in Add TBH calculations	
Tax Region	Input or load	Employee tax region	Employee Tax Accounts
Health Plan	Input or load	Employee health elections, such as Family or Individual. Used in health care cost calculations	
Skill Set	Input or load	Information about applicable employee skills and professional competencies	
Action	Input or load	Used in calculations, this member derives current employee status after status changes made such as maternity leaves and terminations	
Status	Calculation	The employee's status based on last action applied. Status is also used to determine whether an employee is paid	• Status and Action • Cal TP-Index • Start Month
Performance	Input or load	Employee performance level	
Salary Basis	Input	When an employee is paid; annually or hourly, for example.	
Working Days	Input	Number of working days per year	
Annual Increase	Input	Used instead of "Merit with Performance Rating" to identify salary increases based on performance. Applied to all employees	

Member	Input, Load, or Calculation	Description	Dependency
Salary (%) - Maternity Leave	Input	Enter the percent of Salary an employee is paid while on Maternity Leave	
Target Rate	Calculation	The Target Salary Rate based on the employee grade	Salary Basis Grade Mid Point Salary
Market Adjustment	Input	Value assigned to new employees above the "Target Rate" annual amount	
Salary Rate	Input or load	The amount the employee makes per hour or per year	
Hours per Week	Input or load	The number of hours hourly paid employees work each week	
Hours per day	Input	Enter working hours per day	
Annual Salary	Calculation	Determines, while considering FTE, the annual salary per employee based on if they are hourly or salaried employees	• Salary Rate • Salary Basis • PayType • FTE • Hours per Week
Annual Overtime	Calculation	Determines the annual overtime for hourly employees	• Pay Type • Salary Basis • Hours per Week, • Salary Rate
Differential %	Calculation	Determines the percentage by which an employee's Target Base Annual salary and the actual Annual salary differ.	• Annual Salary • Target Rate • SalaryBasis
Merit Target %	Input or load	Employee Merit Target %	
Rec. Merit %	Calculation	The recommended merit percentage for an employee based on their performance rating	Performance
Override Merit %	Calculation	Enables managers to specify an employee merit percentage different than Recommended merit %	
Bonus Basis Input	Input	Indicates which period the bonus is paid	
Bonus Basis	Calculation	Basis that determine bonuses	Employee Type Regular

Member	Input, Load, or Calculation	Description	Dependency
Rec. Bonus %	Calculation	Recommended bonus percentage based on performance rating	• Grade • Performance • Employee Type • Rec. Bonus%
Override Bonus %	Input	Enables managers to use a different Bonus percentage for an employee that differs from the Recommended bonus %	
Bonus %	Calculation	Determines the bonus percentage based on a recommended percentage, but also enables bonus percentage overrides	Rec. Bonus % Override Bonus %
Bonus Adjustment $	Input or load	Allows adjustment to the Bonus as a Dollar Adjustment for employee bonus	
Merit Adjustment %	Calculation	The merit adjustment percentage based on a recommended percentage. Allows merit percentage overrides	Override Merit% Rec Merit %
Merit Adjustment % Cum	Calculation	Cumulative merit adjustment percentages used for determining merit	• Merit Adjustment % • Merit Month • Cal TP-Index
Adjusted Annual Salary	Calculation	Revised Annual Salary for employees. The Adjusted Annual Salary is Annual Salary + Cumulative Merit %	Annual Salary & Merit Adjustment % Cum
Adjusted Annual Salary (Prior)	Calculation	The adjusted annual salary for the prior period. This is used in the US Tax Calculation	Adjusted Annual Salary
SSTax Rate1	Calculation	References the Social Security Tax (FICA) primary rate at a predefined location. This member prevents other calculations from identifying the value storage location	SSTax Rate1 Input
SSTax Rate2	Calculation	References the Social Security Tax (FICA) secondary rate at a predefined location. This member prevents other calculations from identifying the value storage location	SSTax Rate2 Input
SSTax Cap	Calculation	References the Social Security Tax (FICA) cap at a predefined location. This member prevents other calculations from identifying the value storage location	SSTax Cap Input

Member	Input, Load, or Calculation	Description	Dependency
SUI Rate	Calculation	References the State Unemployment Insurance (SUI) rate at a predefined location. This member prevents other calculations from identifying the value storage location	SUI Rate Input
SUI Cap	Calculation	References the State Unemployment Insurance (SUI) cap at a predefined location. This member prevents other calculations from identifying the value storage location	SUI Cap Input
FUTA Rate	Calculation	References the Federal Unemployment Tax (FUTA) rate at a predefined location. This member prevents other calculations from identifying the value storage location	FUTA Rate Input
FUTA Cap	Calculation	References the Federal Unemployment Tax (FUTA) cap at a predefined location. This member prevents other calculations from identifying the value storage location	FUTA Cap Input
Medicare Rate	Calculation	References the Medicare rate at a predefined location. This member prevents other calculations from identifying the value storage location	Medicare Rate Input
Department Headcount	Calculation	Total Headcount for a department; uncategorized by type	
Regular Headcount	Calculation	Number of regular employees currently active	Employee Type Status
Departed Headcount	Calculation	Number of regular employees with departed status	Employee Type Status
LOA Headcount	Calculation	Number of regular employees away on a leave of absence	Employee Type Status
Maternity Headcount	Calculation	Number of regular employees away on maternity leave	Employee Type Status
On Sabbatical Headcount	Calculation	Number of regular employees that are away on sabbatical	Status
Total Regular Headcount	Calculation	Number of regular employees	
Contractor Headcount	Calculation	Number of contract employees	Employee Type Status

Member	Input, Load, or Calculation	Description	Dependency
Temporary Headcount	Calculation	Number of temporary employees	Employee Type Status
Other Headcount	Calculation	Number of “other” employee types. This member also reflects more Employee Types that you add to Headcount	Employee Type Status
Regular FTE	Calculation	Full Time Equivalent (FTE) for regular employees	Employee Type Regular, Status, FTE
Contractor FTE	Calculation	Full Time Equivalent (FTE) for contract employees	Contractor Smart List, Status, FTE
Temporary FTE	Calculation	Full Time Equivalent (FTE) for temporary employees	Employee Type, Status, FTE
Other FTE	Calculation	Full Time Equivalent (FTE) for “Other” employee types	Status, FTE, Employee Type
FTE	Input or load	The full-time equivalent for A job. For example, an FTE of .5 indicates that a job requires half-time employee assignment	
Working Hours per Month	Input or load	Number of hour an employee works per month	
IsEmpty	Calculation	Used in business rules to determine the next available TBD member	Do not delete. If you rename this member, you must update business rules.
Salary	Calculation	Salary for new and existing employees. The salary of existing employees takes their status into account	• Annual Salary • TimeBalance Spread • Start Month • Status
Merit	Calculation	Merit increases based on a merit percentage	Annual Salary Merit Adjustment % Cum
Overtime	Calculation	Determines the overtime for new and existing employees. Existing employees’ overtime takes employee status into account	• Annual Overtime • TimeBalance spread • Start Month
Adjusted Salary	Calculation	Rollup member	
Bonus	Calculation	Determines bonuses based on bonus percentage and basis.	• Bonus %, • Adjusted Salary • Bonus Basis

Member	Input, Load, or Calculation	Description	Dependency
Sign-On Bonus	Input	Additional bonus given to a new employee	
Commissions	Input or load	Commission	
Total Salary	Calculation	Rollup member that aggregates all salary	
Health Care Costs	Calculation	Health care costs based on the selected health plan	Health Plan Employee Type
Severance	Input or load	Additional funds paid to departing or terminated employees	
Other Compensation	Input or load	Additional benefits or other compensation expenses paid for departing employees	
Total Compensation	Calculation	Derives the total value for all employee compensation expenses such as salary, bonus merit, benefits, and taxes	
Social Security Tax	Calculation	Simple Social Security Taxes (FICA) based on a tax region, rate and cap	● CYTD Total Salary ● Total Salary ● SSTax Cap, ● SSTax Rate1 ● SSTax Rate 2 ● Tax Region
Medicare	Calculation	Simple Medicare costs based on a tax region, rate and cap	● Tax Region ● Total Salary ● Medicare Rate
SUI	Calculation	Simple State Unemployment Insurance (SUI) based on a tax region, rate and cap	● Total Salary ● CYTD Total Salary ● CYTD Total Salary Prior ● SUI Cap ● SUI Rate
FUTA	Calculation	Simple Federal Unemployment Taxes based on a tax region, rate and cap	● Tax Region ● CYTD Total Salary ● FUTA CAP ● Total Salary
Employee Expenses	Calculation	Rollup member that determines employee compensation expenses by considering data such as salary and taxes	

Member	Input, Load, or Calculation	Description	Dependency
Calculation Hourly Cost	Calculation	Determines hourly employee-related expenses	
Loaded Hourly Cost	Input or load	Enables you, if you do not want to use or calculate existing employee hourly costs from an external source systems in the product, to store this existing data	
Hourly Cost	Calculation	Based on the values of the Loaded Hourly Cost and Calculation Hourly Cost members, this member determines employee costs per hour	Loaded Hourly Cost Calculated Hourly Cost
wCount	Calculation	Used to determine the next available member for adding employee requisitions	
FYTD Total Salary	Calculation	Fiscal year-to-date for Total Salary	Total Salary
FYTD Total Salary (Prior)	Calculation	Fiscal year-to-date for prior period's Total Salary	FYTD Total Salary
CYTD Total Salary	Calculation	Calendar year-to-date for Total Salary	Total Salary
CYTD Total Salary (Prior)	Calculation	Calendar year-to-date total for prior period's Total Salary	CYTD Total Salary
CYTD Sign On Bonus	Calculation	Calendar year-to-date total for Sign On Bonus	Sign On Bonus

Glossary

Account Dimension that supports planning for workforce resources. See “Account” on page 11.

benefits assumptions You set benefits assumptions to set guidelines for calculating annual merit increases and bonuses.

employee grade Indicates an employee's level in an organization. Employee grade drives the salary for a new employee.

employee type A property of a labor resource: regular, contractor, or temporary.

Employee The Employee dimension contains the employees in an organization. The Account dimension stores employee property information.

Entity Dimension that represents an organization, department, or business unit.

FTE (full-time equivalent) Measures the workforce in relation to full-time employees. For example, an FTE of .5 means the job is for a half-time employee. If a job is to be filled with ten half-time employees, the FTE for that job is 5.

FUTA cap input Federal Unemployment Tax Act. Federal payroll taxes that fund unemployment compensation. Enter the annual ceiling (cap) per year.

FUTA rate input Employers fund federal unemployment compensation. Enter the annual percentage rate. (FUTA stands for Federal Unemployment Tax Act.)

global rates Assumption rates set at a high level that are used in various calculations to derive costs.

headcount The number of resources (actual people) you are requesting. A manager can request more than one headcount.

hiring requisition A vacant job to be filled by an employee hired in the future.

Job Dimension that contains the roles within an organization.

Medicare rate input The employer contribution rate for Medicare, the U.S. federal health program.

mid-salary compensation assumptions You set mid point salaries by grade to plan for the annual salary of new employees.

SSTax cap input The Federal government places a cap on Social Security taxes; that is, income over a certain amount is no longer subject to Social Security tax.

SSTax Rate1 input The rate at which employer-paid Social Security taxes are calculated.

SSTax Rate2 input This field is not used in Oracle Hyperion Workforce Planning calculations unless you specify it as another part to Social Security Tax.

SUI cap input State Unemployment Insurance. State payroll taxes that fund unemployment insurance. Enter the annual ceiling (cap) percentage.

SUI rate input State Unemployment Insurance. State payroll taxes that fund unemployment insurance. Enter the annual rate.

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