Workforce Planning (WFP)
Budgeting & Forecasting salary costs

Version 1.3
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**Background**

Workforce Planning (WFP) was developed to assist the budgeting and forecasting of salaries, by utilising the data available in HR used to generate the actual payroll payments. Current HR data is modeled within the Hyperion WFP system to generate accurate costings for future years.

WFP initially presents a draft budget based on this modeled view of current data, it is then amended for known changes, until an agreed final budget is reached and loaded into Hyperion Planning.

Some of the benefits of WFP include:

- Budgets and forecasts based on the latest HR/T2 data
- Hyperion further utilised as the prime tool for budgeting and forecasting
- A sound and consistent base for forecast and budgets
- Systemise development of forecasts and budgets
- Better interface detailed salary forecasts and budget development with Hyperion planning
- Provide improved detail on staff costs and activities

**Data Sources**

The data in WFP is sourced directly from Talent 2 (T2), the HR system. As this is the data used in payroll processing, it is the best source of data for forecasting and budgeting. The data is also regularly reviewed as part of normal operations and management reporting.

Care should be taken when interpreting data, particularly dates, which have a function within the HR system, but could lead to misleading budgets. Allowance end dates, for instance, when in practice the allowance will continue, need to be adjusted in WFP.

In cases where data relating to General Ledger postings needs adjustment, for example Responsibility Centres or Project Codes, this should be done on the source HR system (through normal channels) as well as on WFP.

Position is a field used in the HR system which is used within WFP, it is particularly useful for budgeting a post that is not currently occupied, such as a vacancy. All staff are linked to a position, but WFP may also report Positions which are not occupied, or are redundant, though these will not generate $'s.
The Budget Process

This is a suggested process only, but it does reflect the changed emphasis required due to WFP presenting a starting point. Reporting becomes the starting point, then a typical iterative process as the data is refined until a final budget is agreed.
Reporting

A range of reports are available on the WFP data. These are useful for both reviewing the data when making changes, and for reporting draft and final budgets to clients.

A particularly useful feature of the WFP reports is the ability to report per person by leave status or FTE, when salary details are sensitive or confidential.

Samples and descriptions of the WFP reports currently available are in the section below ‘reporting suite’.

Reports can generally be run for a range of values, such as FTE, or total salary. To select this go into Class Codes on POV, choose Custom_Calc, and make your section:
Logging In

Logging in to WFP is similar to Hyperion Planning, through:

Navigate > Applications > Planning > WFP

Forms

Forms present a range of detailed data, used to generate the budget or forecast figures, some of which can be adjusted and saved. Most forms are per person and per month. The main form for adjusting an individual salary report is ‘1.0 Employee Properties’:
Searching on Forms

Forms will return data when there is a valid combination of Responsibility Centre, Staff Member and Project Code.

To search for a person, type the staff number in if you know it (having a print out of a WFP report can be useful).

If not type in the surname:

Then use the drop down box to find the staff member.

When searching there is no requirement to use wildcards.
1.0 Employee Properties

This form displays a wide range of data for the selected employee, as in Hyperion Planning, yellow cells can be adjusted and saved, while green cells are for information.

Occupation Type

Determines the type of employment against the position.

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondment</td>
<td>CON</td>
</tr>
<tr>
<td>Higher Duty Allowance</td>
<td>HDA</td>
</tr>
<tr>
<td>Substantive</td>
<td>SUB</td>
</tr>
</tbody>
</table>

Substantive is an employee’s main or regular job.
Position Fraction

Shows the FTE assigned to a Position. A full time position will be 1.0, 3 days per week would be 0.6, and so on.

Bear in mind that this is separate to the FTE assigned to an employee, the occupant of a position.

Distribution Percentage

Shows the percentage of salary cost to be charged to the RC/Project combination selected.

So for instance, a position which is charged in even proportions to two RC/PC combinations would have a distribution percentage of 50%

Award

There are a number of award types possible, though the most common will be ACA for Academics and G35 for General Staff.
Status

This refers to the employment status of the employee, distinguishing between full or part time staff, and whether continuing or fixed term.

### Step

The step point within the salary level.

Note that as incremental progression is now automatic WFP will accurately calculate step increases.
### Action

Action is a description of the occupants current status in the role, the most common being ACT or 'Active'. However a person may be attached to a role but on sabbatical (SSP), maternity (MAH) or a range of other situations.

### Pay Multiples

Pay Multiples indicates the number of pay periods falling in a month, so generally 2, occasionally 3, but often a fractional amount in January or December.

**Some definitions from forms:**

"Regular_Salary" = "Pay_Multiples" * "Fortnight_Salary" * "FTE"

"FTE" = "Position_Fraction" * "Distribution%" * ("Pay_Multiples"/"Pay_Periods")

"Pay Periods" is specific to the employee

"Pay Multiples" is the default number of pays in a given month

For instance, in a month with two pay days, the "pay Multiple" will always be 2, but if an employee terminates part way through a month, the “Pay Periods” might be 1.3 etc.
Making Changes via forms – worked example

Below is an example of how to change costing data for budgets or forecasts, through forms.

The report below shows that the Employee with Staff number (1004698) will be taking sabbatical (Special Studies Program) in the early months of the year reported.

Assume that we now know this sabbatical has been postponed, and will not occur. Go into the form for that person, then into the cells showing SSP, and change each of those cells via the drop down box from SSP to ACT. When all of the cells are adjusted, press save. Note that as in Hyperion Planning adjusted cells are a brighter yellow.

The saved changes are shown below:

And the refreshed report shows the update, note that if maternity had been selected the $ values would also have changed.
Forms – Detailed Allowances

Shows the allowances applicable to a staff member.

Forms – Manage Allowances

Care needs to be taken with allowances as in many cases they have end dates. However for budget purposes, if allowances are likely to continue in practice, then these end dates will need adjustment.

Forms – On Costs Assumptions

<table>
<thead>
<tr>
<th></th>
<th>FY10 Forecast</th>
<th>FY10 Budget</th>
<th>FY11 Forecast</th>
<th>FY11 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Tax %</td>
<td>5.95%</td>
<td>5.95%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workers Compensation %</td>
<td>0.60%</td>
<td>0.60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long Service Leave %</td>
<td>2.5%</td>
<td>2.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maternity %</td>
<td>0.60%</td>
<td>0.60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Leave Loading %</td>
<td>1.35%</td>
<td>1.35%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Forms – Pay Periods per Month

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10 Forecast</td>
<td>5</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3.1</td>
</tr>
<tr>
<td>FY11 Budget</td>
<td>1.9</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3.1</td>
</tr>
<tr>
<td>FY12 Budget</td>
<td>1.9</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3.0</td>
</tr>
</tbody>
</table>

Forms – EBA & AWA Increments

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10 Forecast</td>
<td>3%</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY11 Budget</td>
<td>2.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY12 Budget</td>
<td>2.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY10 Forecast</td>
<td>2%</td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY11 Budget</td>
<td>2.5%</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY12 Budget</td>
<td>2.5%</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
## Forms – Superannuation percentage

<table>
<thead>
<tr>
<th>Class Codes: Super%</th>
<th>Periods: BegBalance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheung, Stephen Lee-Yun (2004698)</td>
<td>Economics Operating (P0801)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FY11</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturer (P13228)</td>
<td>17%</td>
</tr>
</tbody>
</table>
Business Rules

Business Rules offer an alternative method to forms for changing data, and in many cases are quicker than manually adjusting forms, but they also allow you to add data that does not exist in the HR system, such as vacancies.

![Business Rules for 1.0 Employee Properties]

As with Hyperion Planning, double click on any of the Business Rules, then ‘Launch’ the desired rule:

![Launch Business Rules]

**Uses for TBH Forms:**

As indicated by “TBH” (to Be Hired) the main use of the 5 TBH forms is to add a vacancy, as there will be no current data sourced from T2. The sections below illustrate how to do this.

However, you can also use these forms to change existing data, particularly when a fixed Term contract results in no data past this period, but you wish to extend the budgeted period.
Adding a Vacancy / Change existing data

Setting up a new position or vacancy varies according to the person’s award, so different business rules have been set up for the main awards (TBH = to be Hired):

- Add TBH - ACA: An Academic post on EBA
- Add TBH - G35: A General post on EBA, 35 hours per week
- Add TBH - G38: A General post on EBA, 38 hours per week
- Add TBH - G40: An General post on EBA, 40 hours per week
- Add TBH - Other: An Academic or General post which is not on EBA, or is level 10+.

These business rules create a new position (in WFP only) and populate pay multiples, pay rates and calculates on-costs. Note: the Step number needs to be entered twice, once as a text with quotation marks (“1”) and again as a value/number (1).

Select Month (start), Year (start), Month (end), Year (end), Employee, Position, Employment Status, Step (text), Step (value), RC, PC, Scenario, Distribution Percentage, Position Fraction and Super Percentage

Note on the Run Time Prompts
As shown above the box appear quite small, drag the corners so you can see more of the parameters:
Workforce Planning (WFP)
2011 Budget

For SGS/Other positions:

- Add EBA TBH – Other

If a vacancy is intended to be outside of the EBA, for instance a private contract, or for a General Staff member who will be above level 10 (Special Grades), you need to use this business rule. The main change is that the annual salary needs to be entered manually.

- It populates pay multiples, converts the entered Annual Salary into fortnight rate, indexes the fortnight rate and calculates on-costs.

- Select Month (start), Year (start), Month (end), Year (end), Employee, Position, Award, Employment Status, RC, PC, **Annual Salary**, Scenario, Distribution Percentage, Position Fraction and Super Percentage.
Change RC & PC:

This rule is useful if an employee, or a group of employee’s, need to have their current RC or PC adjusted for the 2011 budget, for instance if there is a restructure, or a group of staff are to be assigned a new Project Code.

Clear Values:

This rule is particularly useful for deleting vacancies or correcting errors made.
- Use this rule to delete existing/to-be-hired positions/employees or delete full/partial year data.
- Select Employee, Position, Responsibility Centre, Project Code, Year, Month (start), Month (end), and Scenario.

Change position:

- It copies data from Position1 to Position2 and deletes Position1 data.
- Select Employee, Position (from), Position (to), Scenario, Year, Month (start), Month (end).
Copy Employee Data:

Useful to create a new vacancy or position with similar characteristics to an existing post.
Reporting Suite

The WFP reports currently available are shown below, samples of the reports follow:

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Modified</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Code by RC, PC, Emp, &amp; Pos</td>
<td>Financial Reporting Report</td>
<td>7/19/16 2:09 PM</td>
<td>Class Codes for RC, PC, Employee &amp; Position</td>
</tr>
<tr>
<td>Detailed Report for One Employee</td>
<td>Financial Reporting Report</td>
<td>7/19/16 2:41 PM</td>
<td>Detailed Report for One Employee</td>
</tr>
<tr>
<td>FTE &amp; Salary By Classification</td>
<td>Financial Reporting Report</td>
<td>7/19/16 2:43 PM</td>
<td>FTE &amp; Salary by Classification Report</td>
</tr>
<tr>
<td>Fixed Term Employees</td>
<td>Financial Reporting Report</td>
<td>7/19/16 2:45 PM</td>
<td>Fixed Term Employee Report</td>
</tr>
</tbody>
</table>

Reports can generally be run for a range of values, such as FTE, or total salary. To select this go into Class Codes on POV, choose Custom_Calc, and make your section:
1.0 Class Code by RC, PC, Emp & Pos

Report per person, by month, with staff name and staff id, plus position and RC/PC.

Note that the example below is heavily rounded, the live report will show $ per month.

2.0 Class Code by Position and Employee

Similar to the Main Report, but showing all positions and the current occupant. If there is no current Occupant then ‘No Employee’ will show against Employee, there may be a number of these where positions have been set up in HR but are not currently in use, however these will attract no costings.
3.0 Leave Report

A report by Employee which can be used to report the employment status of an employee against a position, this comes from the 'Action' field in Forms and will display if a position is fully active, or has another status such as Vacant or maternity leave.

This report can be valuable for clients where $ values are confidential, for determining possible casual demand, and general staff planning.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Position</th>
<th>Centre Code</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Employee</td>
<td>Associate Lecturer (P13269)</td>
<td>F0801</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
</tr>
<tr>
<td>No Employee</td>
<td>Lecturer (P13239)</td>
<td>F0801</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
</tr>
<tr>
<td>No Employee</td>
<td>Senior Lecturer (P13255)</td>
<td>F0801</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
</tr>
<tr>
<td>No Employee</td>
<td>Senior Lecturer (P24239)</td>
<td>F0801</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
<td>Vacant</td>
</tr>
<tr>
<td>Agostou, Muriel (100299)</td>
<td>Associate Professor (P11148)</td>
<td>F0801</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>Andrew, Richard (1023579)</td>
<td>Admissions Officer (P10684)</td>
<td>F0801</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>Binik, Oleksia (1038736)</td>
<td>Lecturer (P13226)</td>
<td>F0801</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>Busby, Suzanne (1041511)</td>
<td>Discipline Executive Officer (P10202)</td>
<td>F0801</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>Cheung, Stephen Lee-Yun (1042485)</td>
<td>Lecturer (P13229)</td>
<td>F0801</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
<td>Active</td>
</tr>
</tbody>
</table>

4.0 FTE Report

A report by Employee which can be used to report the FTE in a given month. Again this report is useful for clients where salary details are confidential, but also gives the FTE budget per month.

<table>
<thead>
<tr>
<th>Employee</th>
<th>YearTotal</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimoure, Anthony (1002893)</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
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<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Arthur, Neal Hons (101338)</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
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<td>1.00</td>
<td>1.00</td>
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</tr>
<tr>
<td>Heni, Charles (1004970)</td>
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<tr>
<td>Agostou, Muriel-Kirina (1012608)</td>
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</tr>
<tr>
<td>Ann, Richard Marcus (1025879)</td>
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<td>1.00</td>
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<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Anthony, Christine (1003107)</td>
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<td>Poon, Angela (1036832)</td>
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<td>1.00</td>
</tr>
</tbody>
</table>
5.0 Detailed Report by RC, PC, Employee & Position

A report by Employee and Position with greater detail on factors such as level and step, with calculations of salary costs.

6.0 Detailed Report for One Employee
7.0 FTE and salary by Classification Report

A summary report by FTE and salary costs, showing the distribution across different levels.

8.0 FTE and salary by Project Code Report

A report which gives summary FTE and Salary information by project code, split by Academic and General Staff. Particularly useful for relating to UEM project code segments.

9.0 Fixed Term Employee Report

A report by employee and month for all fixed term employees.
Frequently Asked Questions

Is there a quality issue with the data from T2?

The information in Talent2 is used to process the payroll and therefore the most accurate source of HR information we have available, if there is a “quality” issue or the data is incorrect than it is the responsibility of the Finance and HR staff working collaboratively to ensure that it is correct in the source system i.e. Talent 2.

WFP relies on the data used to generate pay, and cost allocation to the GL, which is regularly reviewed by Finance staff and is therefore generally ‘clean’. It is also the same data used to generate the spreadsheets used previously.

The only real data issues are around dates, which are correct for HR purposes, but can lead to misleading budgets. For instance, allowance end dates, when in practice they will continue or belong to the position.

The system, in general, calculates pay costs on a monthly basis, rather than through exact dates.

Allowances are calculated with actual dates, however some leave conditions such as leave without pay or maternity can only be entered, and calculated, in month blocks. This is partly for ease of entry, and interpretation, but we also need to be realistic on accuracy when looking many months ahead.

WFP will have a negative impact on Hyperion performance.

At this stage there are no issues with the Workforce planning software, all capacity and performance issues are related to the development server (hardware) used to test the product. FMA will continue working in collaboration with ICT towards a stable platform.

The time involved in updating changes in WFP is far more than that if the spreadsheet is used as before.

Because WFP uses existing data to draft an initial budget, and then transfer’s data directly to Hyperion Planning, there is considerable scope for efficiency. Additionally, with the UEM we should not underestimate the scale of manual entry in units using a range of project codes, though this might impact more in Faculties.

The updated information in this Workplace Planning Module cannot be linked to T2.

System data should always be corrected at source, Financial Services can budget something like positions, but correct HR protocols need to be followed before an actual position is established.

The module cannot provide information regarding variance between budgets and actual which is a basic requirement for management accounting system.

When the information is in Hyperion then reporting is simply a matter of extracting it correctly, actual vs. budget reports are certainly possible, have been discussed, and could easily be available by the time they are required in 2011. Once the data is in Hyperion a multitude of reporting options become available.
This module cannot provide an efficient and effective tool in dealing with complex staffing situations, or unknowns such as research activity.

Finance staff need to use experience and judgement to know which tool to use, in most cases it will be WFP, but manual entry to Hyperion always remains an option.

The previous spreadsheet based system was reasonably accurate and staff where used to it, why change?

There is too much time spent on the existing budget process, a more strategic approach to budgeting needs to be adopted that will add value. The use of HR data directly from Talent 2 (the source system) and less from manually input excel spreadsheets is an important step forward.

The only benefit is the salary budget is linked to the Hyperion Planning but is outweighed by the costs involved (including development costs, training and additional time cost incurred as compared to that if spreadsheet is used).

It is true that some of the key benefits are in the links to Hyperion, including removal of manual data entry, more accurate seasonalisation, monthly FTE budgets, etc. However WFP should also be more efficient, systematic, and accurate, than the current manual process.