



ORACLE®



**ORACLE®**

**Introduction to Oracle's Hyperion Workforce Planning  
Session ID: 41910**


Guillaume Arnaud – Principal Product manager – Oracle | Hyperion  
Floyd Conrad - Global Domain Expert, Planning - Oracle | Hyperion





# Agenda

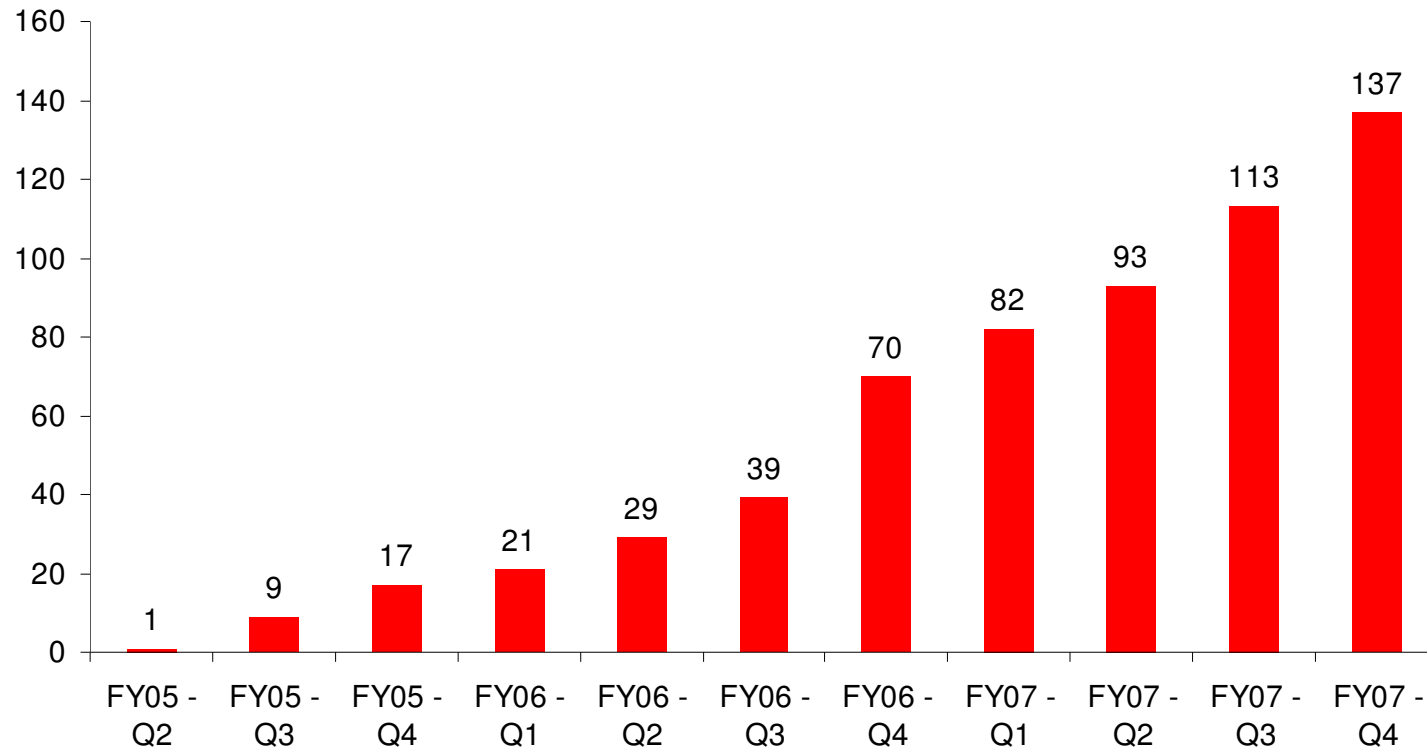
- Current State
- Overview Workforce Planning
- Working with Workforce Planning
- Workforce Planning Structure
- Product Demo



The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.



# Workforce Planning Customers



WACHOVIA

ORACLE

# Better Manage One of Your Largest Variable Expenses

## ABC Company Income Statement

Revenue-----	\$5,000B
COGS-----	\$3,000
<b>Gross Margin-----</b>	<b>\$2,000</b>

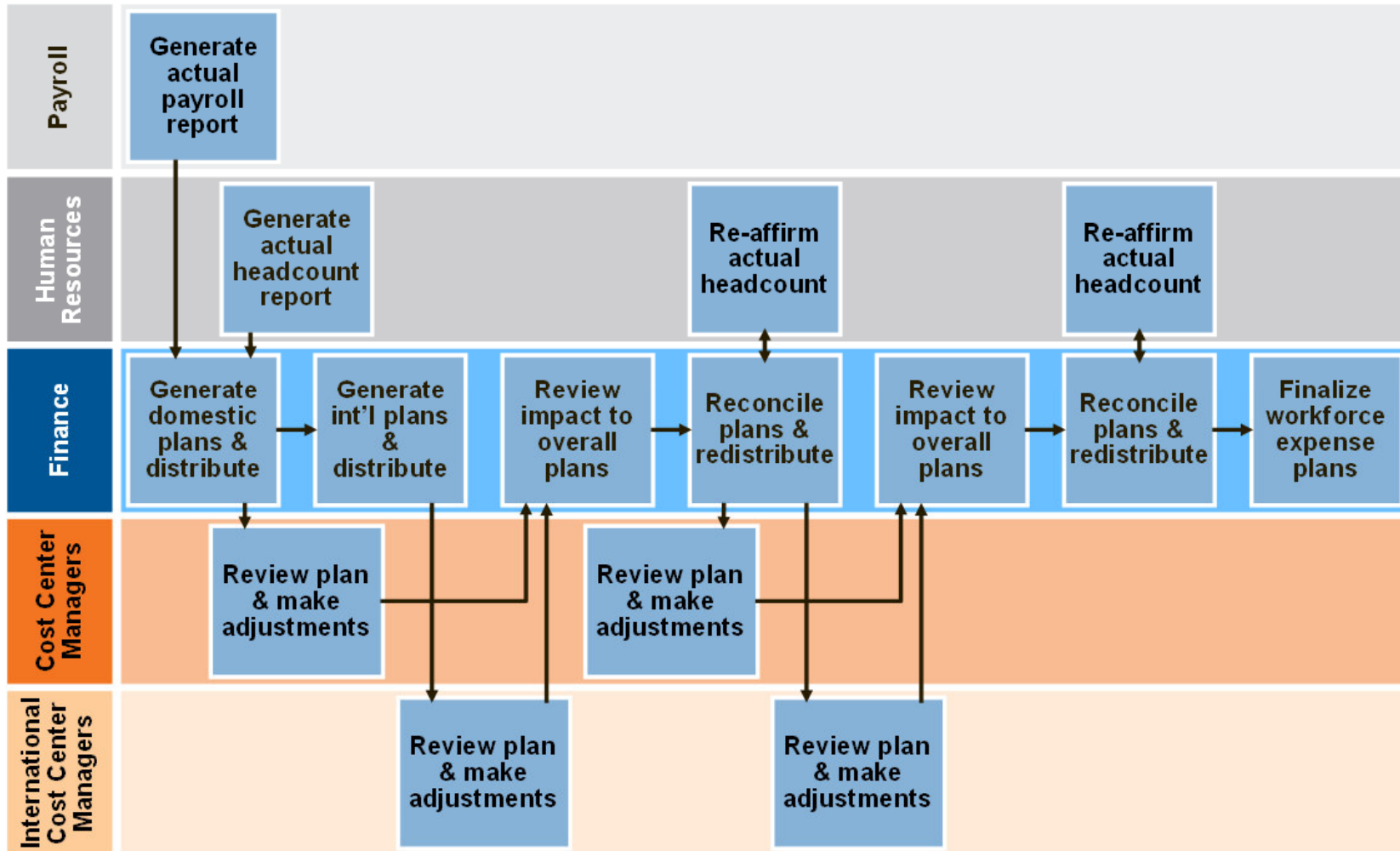
### Operating Expenses

Payroll-----	\$ 300
G & A-----	\$ 250
Depreciation-----	\$ 50
<b>Operating Income-----</b>	<b>\$1,400</b>

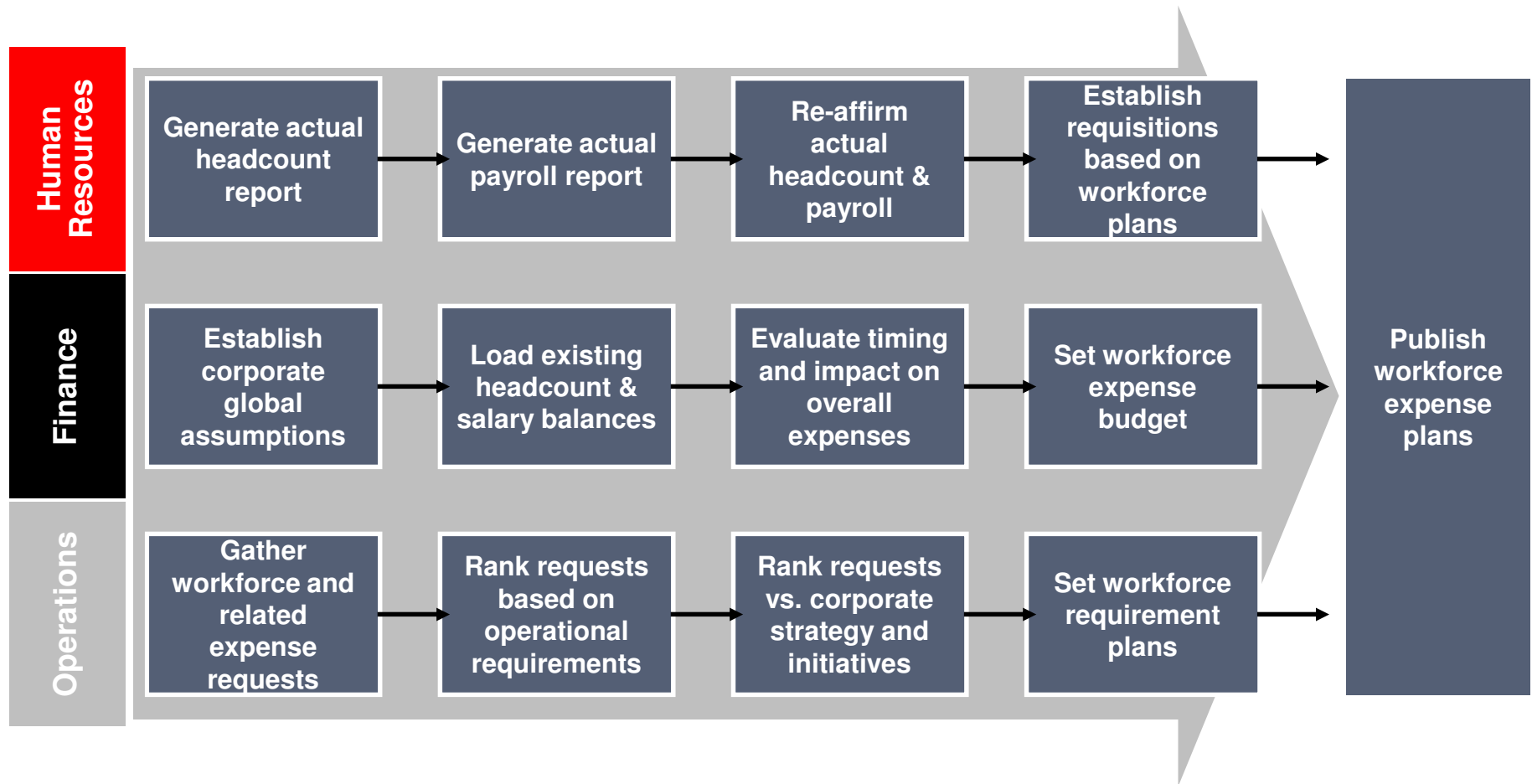
Interest Expense-----	\$3,000
<b>Net Income-----</b>	<b>\$2,000</b>



# Disconnected Plans Cause Redundancy and Repetition



# Centralized System Makes Planning Process Efficient







- One of the 20 largest financial institutions worldwide
- Revenues of ~9 billion USD (2005)
- Over 113 thousand full time employees

## 807 Active Planning Licenses

### Before

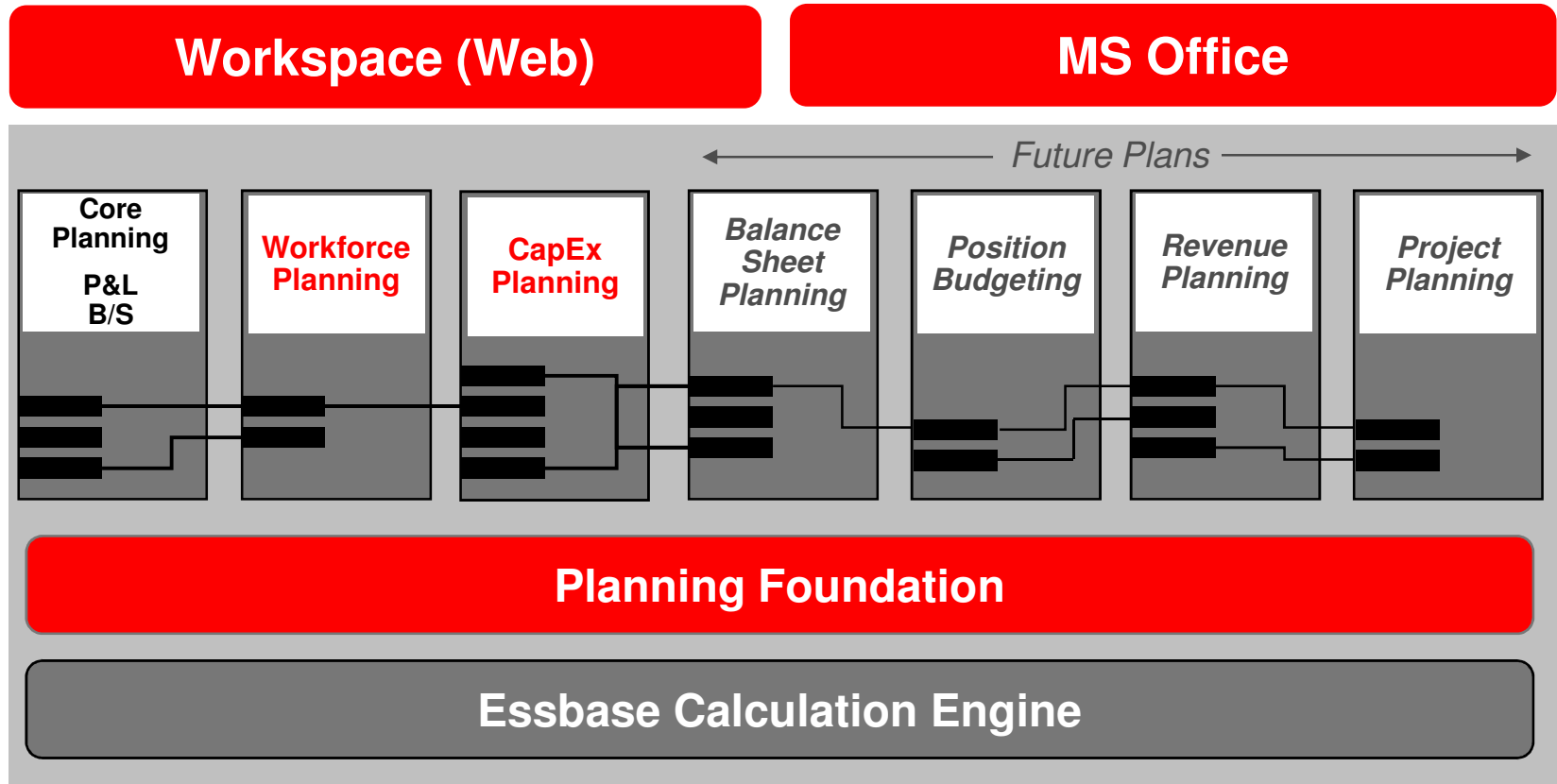
- First budget iteration took 8 weeks, while transferring employees or departments took 10 days
- Creation & distribution of the Excel templates took 4 weeks
- The data was not dependable for management to make business decisions
- Corporate Budget group employed 9 people to maintain the process and offline system

### After

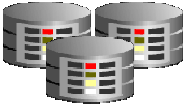
- First budget iteration takes only 4 ½ weeks
- Reorganizations down to 24 hours
- A very detailed expense budget that utilized over 700 accounts
- Each individual employee was budgeted (~ 10,000 employees)
- For the first time ever ING had three-dimensional reporting
- Several new reports are being developed to enable managers analyze the business (i.e. Year over Year quarterly comparison)

# Single Centralized Planning Platform

With specialized modules



  
Data Warehouses

  
Transactional Systems

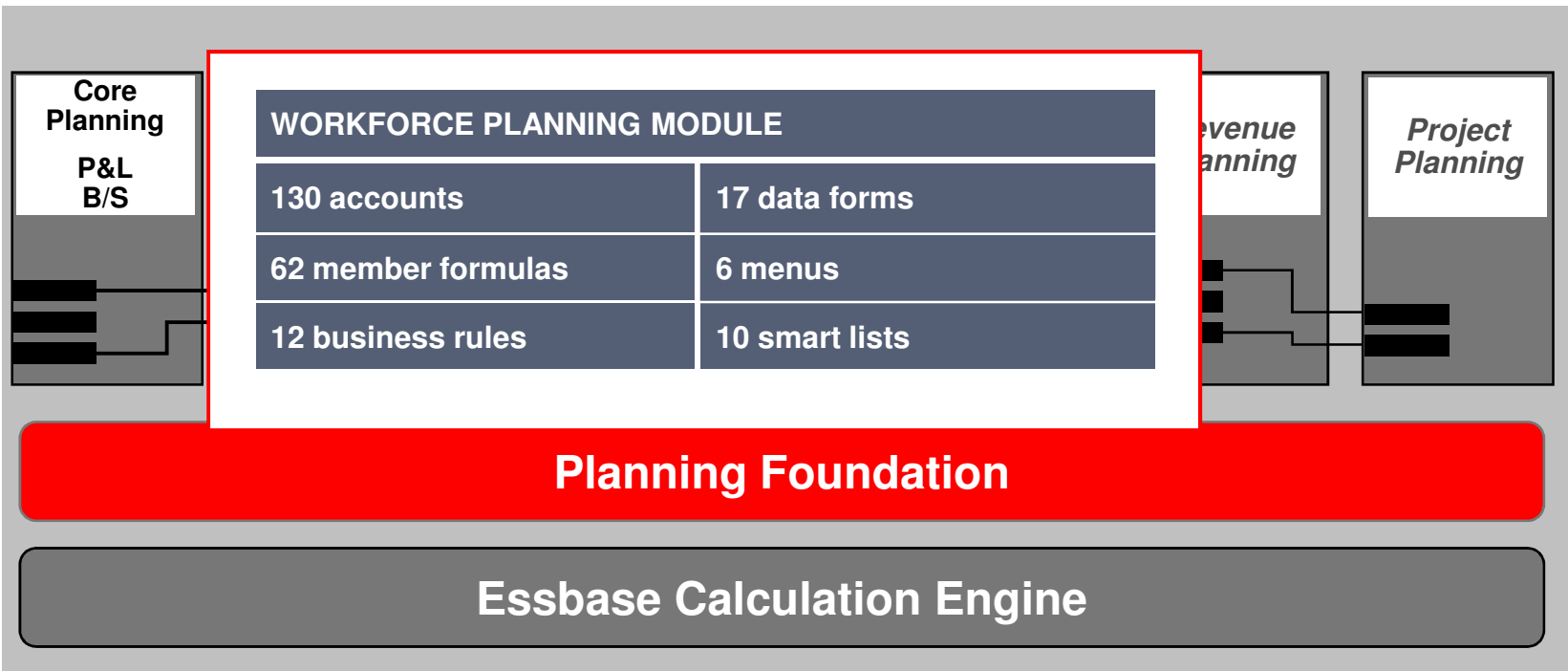
  
Performance Management Applications

# Single Centralized Planning Platform

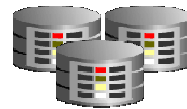
With specialized modules

Workspace (Web)

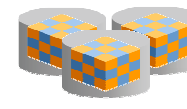
MS Office



Data Warehouses



Transactional Systems



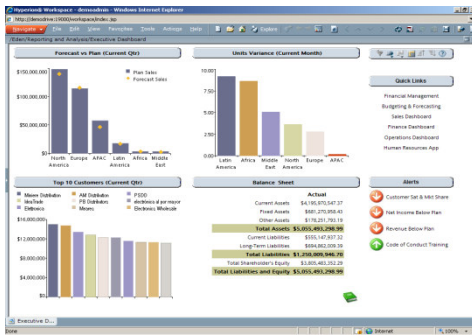
Performance Management Applications

ORACLE

# Planning Data Flow

Reporting

Dashboards



Web Forms

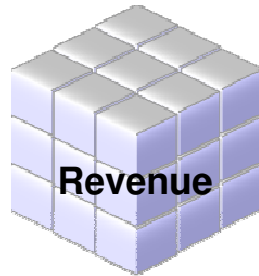
The web form shows a detailed financial table for 'GLOBAL SERVICES' in Philadelphia. The table includes columns for months (Jan, Feb, Mar, Apr, May, Jun, Jul, Aug) and a 'Total' column. Key rows include:
 

- FFR Input:** Values ranging from 1 to 10.
- Annual Salary:** Values around 47,360.
- Work Adjustment %:** Values around 1.0.
- Adjusted Annual Salary:** Values around 47,360.
- Salary:** Values around 3,941.
- Adjusted Salary:** Values around 3,941.

MS Office

The MS Office spreadsheet displays a complex data table with multiple columns and rows, likely representing a detailed budget or financial plan. It includes various sub-totals and data points across different categories.

Planning Application



Source Systems





# Workforce Planning Pre-built Functionality

- Plan salary and other compensation
- Add and delete new hires
- Plan turnover rates
- Change the status of existing employees
- Transfer employees between departments
- Set payroll taxes for different countries and years
- Plan compensation and overtime for hourly employees

# New Hires

The screenshot displays the Oracle Hyperion System 9 Workspace interface. On the left, a task list is visible under the '3 Human Resources' category, with 'Add New Hires' selected. The main area shows a data table with columns: Position, FTE, FT/PT, Grade, Employee T, Tax Region, Health Plan, Start Month, and Target I. A right-click menu is open over the 'Assistant' row, showing options: 'Add To-be-hired', 'Edit Related Expenses', and 'Remove To-be-hired'. The table data is as follows:

	Position	FTE	FT/PT	Grade	Employee T	Tax Region	Health Plan	Start Month	Target I
TBH1	Assistant	1	FT	2	Regular	USA	Individual+J	Mar	40
-New Employees									
-Total Employees		1							

Navigation buttons at the bottom include 'Complete', 'Previous Incomplete', 'Previous', 'Next', and 'Next Incomplete'.

Task lists

Right click menu to trigger specific actions

# New Hires

The screenshot displays the Oracle Hyperion System 9 Workspace interface. The main window shows a tree view on the left with categories like Marketing, Operations, Human Resources, Sales, Purchasing, and Allocations. The central area is titled 'Enter Data - 1. New Hires' and contains a table with columns for Position, FTE, FT/PT, Grade, Employee T, Tax Region, Health Plan, Start Month, and Target I. A dialog box titled 'BPM Add TBH' is open, allowing users to add new hires. The dialog box fields are as follows:

Field	Value
Department	"E01_0"
Employee Type	Regular
FTE	30
Month	May
Position	Sales Rep
Grade	3
Tax Region	USA
Health Plan	Individual
Market Adjustment	0
Scenario	"Plan"
Version	"Working"
Year	"FY07"

A red callout box on the right side of the dialog box contains the text: "Specific pre defined Business Rules".

# Manage Existing Employees

Currency: Local    Operating Unit: No Operating Unit    Product: No Product

Year: 2007

Page 95000 - AVAILABLE    Go

Pre defined Business Smart lists

		Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Aaron, Sam (10101)	Action							Trans...	
	Status	e	Active	Active	Active	Active	Active	None	
Bach, Tom (10102)	Action							Disability_Maternity	
	Status	e	Active	Active	Active	Active	Active	Transfer Out	
Cabb, Lucy (10103)	Action							Transfer In	
	Status	e	Active	Active	Active	Active	Active	Resigned	Active
Dailey, Alyssa (10104)	Action								
	Status	e	Active	Active	Active	Active	Active	Active	Active



# Example - Merit and Promotion Planning

Enter Data - 2. Existing Employee Merit & Promotion - Op Unit

Currency: Local    Product: No Product    Scenario: Budget

The data has been saved.

Page 95000 - AVAILABLE    No Operating Unit    Go

	BegBalance				YearTotal
	Annual Salary	Merit %	Promotion Month	Promotion %	Ending Annual Salary
Aaron, Sam (10101)	52,200	4.00%	Mar		54,288
Bach, Tom (10102)	12,528	4.00%	None		13,029
Cabb, Lucy (10103)	52,200	4.00%	Feb		54,288
Dailey, Alyssa (10104)	20,880	4.00%	Apr		21,715

Pre defined Smart lists



# Predefined Workforce Planning Structure

- Data Forms
- Accounts
- Member Formulas
- Smart Lists
- Smart List Entries
- Menus
- Business Rules



# Predefined Data Forms - Examples

- Manage Existing Employees
- Existing Employees Related Expenses
- New Hires
- New Hires Expenses
- Headcount and FTE
- Department Level Expenses

# Predefined Smart Lists - Examples

Smart Lists    Smart Lists Evaluation Order

Create   Edit   Delete

Smart Lists (10 Total)

<input type="checkbox"/> Smart Lists	Entries
<input type="checkbox"/> EmployeeType	3
<input type="checkbox"/> FT_PT	2
<input type="checkbox"/> Grade	20
<input type="checkbox"/> MeritMonth	
<input type="checkbox"/> Month	
<input type="checkbox"/> PayType	
<input type="checkbox"/> Ret_401k_Pension	
<input type="checkbox"/> Status	
<input type="checkbox"/> TaxRegion	
<input type="checkbox"/> Vendor	

	Aug	Sep
Trans ...		
None		
Active		
Disability_Maternity		
Transfer Out		
Transfer In		
Resigned		

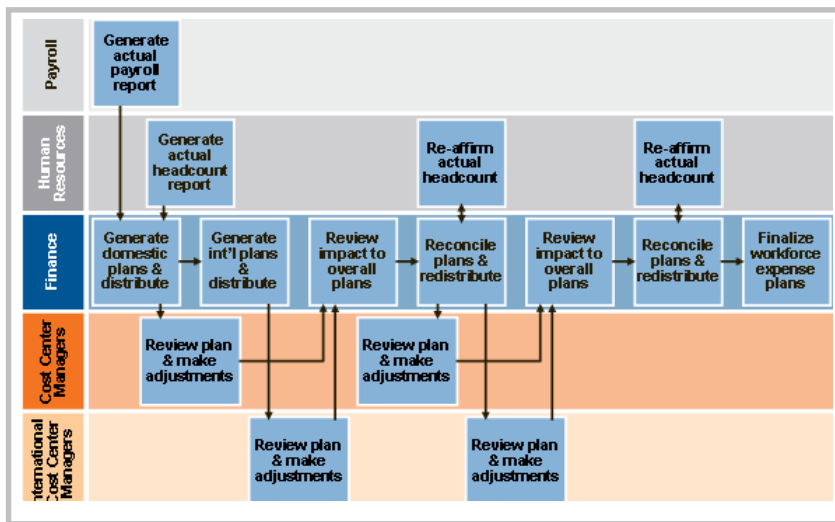


# Predefined Calculations - Examples

- Annual Salary
- Annual Overtime
- Bonus
- Merit
- Regular Headcount
- Regular FTE
- Maternity Headcount
- Change Employee Status
- Plan Departure
- Transfer

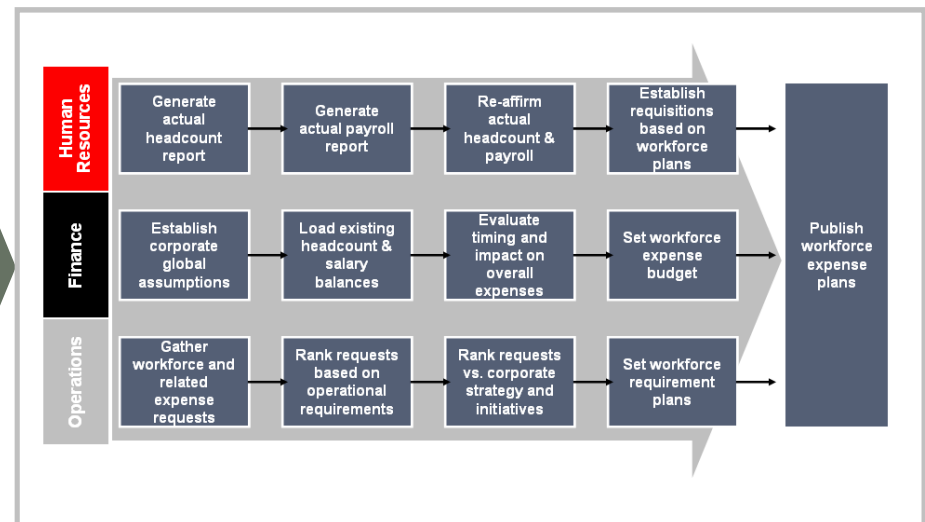
# Simplify the Process and Reduce Cycle Time

From this...



A Disconnected and Long Planning Process

To this...



A Connected, Transparent and Predictable Process



# Oracle Hyperion Planning – Integration Roadmap

## Completed in 2007

---

- Prototype of PeopleSoft HR - Workforce Planning integration using OBIEE
- Oracle BI Publisher Integration - Report generation for Planning

## Planned for CY 2008

---

- Oracle Single Sign On (OSSO)
- Oracle Data Integration (ODI) adapters for Planning
- Free restricted use ODI with Planning
- Oracle BI Publisher Integration
  - Report Customization / Build
- Source Data Integration
  - Direct from Source (using ODI)
    - EBS Financials
    - PSFT Financials
    - PSFT HR
- Drill Back to Source GL Data
- Integration to BPEL Workflow Engine



# Workforce Planning

## Demonstration





ORA



**ORACLE IS THE INFORMATION COMPANY**



**ORACLE®**