

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'.

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/Hyperion Financial Reporting	/Finance Reports/8. Workforce Planning Re	eports		
Folders 📦 🔂	Name 🔺	Туре	Modified	Description
- 🍘 Root	1. Class Code by RC, PC, Emp & Pos	Financial Reporting Report	7/19/10 2:29 PM	Class Code by RC, PC, Employee & Position
+ 📔 Administration	2. Class Code by Pos & Employ	Financial Reporting Report	7/19/10 2:29 PM	Class Code by Position & Employee Report
\min Bay plugin	📰 3. Leave Report	Financial Reporting Report	7/19/10 2:29 PM	Leave Report
+ M Broadcast Messages	4. FTE Report	Financial Reporting Report	7/19/10 2:32 PM	FTE Report
- A Province	5. Detailed Report by RC, PC, Emp & Pos	Financial Reporting Report	7/19/10 2:41 PM	Detailed Report by RC, PC, Employee & Position
Academic Researchers Re	6. Detailed Report for One Employee	Financial Reporting Report	7/19/10 2:41 PM	Detailed Report for One Employee
+ 📔 Finance Adhoc Analysis	7. FTE & Salary by Classification	Financial Reporting Report	7/19/10 2:42 PM	FTE & Salary by Classification Report
+ 📔 Finance Queries	8. FTE & Salary by Project Code	Financial Reporting Report	7/19/10 2:44 PM	FTE & Salary by Project Code Report
- 📁 Finance Reports	9. Fixed Term Employees	Financial Reporting Report	7/19/10 2:45 PM	Fixed Term Employee Report
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🛨 📁 6. Statutory Related I	2			
📁 8. Workforce Planning				
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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':

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		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	_YearTotal
	Occupation Type	SUB 🗸	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB
	Position Fraction	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
	Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Full Time Equivalent	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
	Award	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA
	Status	СРТ	СРТ	СРТ	CPT	CPT	CPT	CPT	CPT	СРТ	СРТ	СРТ	СРТ	CPT
	Step	3	3	3	3	3	3	3	3	3	3	3	3	3
	Action	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT
	Pay Multiples	2.0	2.0	2.0	2.0	2.0	2.0	3.0	2.0	2.0	2.0	2.0	3.1	26.1
	Fortnightly Salary	3,301	3,301	3,301	3,301	3,301	3,301	3,356	3,383	3,383	3,383	3,383	3,383	3,383
Lecturer (P13228)	-Total Salary	4,214	4,214	4,214	4,214	4,214	4,214	6,426	4,319	4,319	4,319	4,319	7,957	56,943
Lectorer (F13220)	Regular Salary	3,301	3,301	3,301	3,301	3,301	3,301	5,034	3,383	3,383	3,383	3,383	5,244	43,616
	Allowances													
	Bonus													
	Super	561	561	561	561	561	561	856	575	575	575	575	892	7,415
	Payroll Tax	230	230	230	230	230	230	350	236	236	236	236	436	3,107
	Workers Compensation	20	20	20	20	20	20	30	20	20	20	20	31	262
	Maternity Leave	20	20	20	20	20	20	30	20	20	20	20	31	262
	Long Service Leave	83	83	83	83	83	83	126	85	85	85	85	131	1,090
	Annual Leave Loading												1,192	1,192
	_On-Costs	913	913	913	913	913	913	1,392	936	936	936	936	2,713	13,327
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Searching on Forms

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l		Position Fraction	1	Channing, Wi Chaophrasy,	liam Francis Sopheak (10)	(1117406) 23437)	. 0)	1.0	1.0	1.0	1.0	1.0		1.0
l		Distribution Percentage	100	Chaplin, Philli Chapman, Ali	p Ándrew (10 son (1114382)30414) 2)	6	•	100%	100%	100%	100%	100%		100%
I		Full Time Equivalent	1	Chapman, Bo	gdan Edward	(1000341)	o		1.0	1.0	1.0	1.0	1.0		1.0
l		Award	ACA	Chapman, Ja Chapman, Ja	(1001227) on Paul (1117269)	.7269)		1	ACA	ACA	ACA	ACA	ACA	ACA	l .
l		Status	CFT	Chapman, Mathew James (1102363) Chapman, Rachel Hilary (1111390)	111390)		0	CFT	CFT	CFT	CFT	CFT	CFT		
l		Step		Chapman, Robert David (1109358) Chapman, Simon Fenton (1000613)			1		1	1	1	1	1		1
		Action	ACT	Chapparo, Ch	iristine Janet	(1002959)		1	ACT	ACT	ACT	ACT	ACT	ACT	
l		Pay Multiples	2	Chappell, Lou	ise (1005271)	0		2.0	3.0	2.0	2.0	2.0		2.0
l		⊐Total Salary	148	Charles, Case	sily (1010257	(1013068)	5	5	14895	22715	15268	15268	15268		15268
1	Professor (P11148)	Regular Salary	116	Charles, Janu Charles, Kelli	e Ann (1001) e Anne (1011	320) .886)	8	8	11668	17793	11959	11959	11959		11959
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1		Payroll Tax	81	2 812	812	812	812	2	812	1239	833	833	833		833

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).

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If not type in the surname:

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	1.0	1.0	1.0	1.0	1.0		1.0	0	1.0 1	.0	1.0 1.	.0

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.

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	Occupation Type	SUB 🗸	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB
	Position Fraction	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
	Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Full Time Equivalent	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
	Award	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA
	Status	СРТ	СРТ	СРТ	СРТ	СРТ	СРТ	СРТ	CPT	CPT	СРТ	СРТ	СРТ	CPT
	Step	3	3	3	3	3	3	3	3	3	3	3	3	3
	Action	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT
	Pay Multiples	2.0	2.0	2.0	2.0	2.0	2.0	3.0	2.0	2.0	2.0	2.0	3.1	26.1
	Fortnightly Salary	3,301	3,301	3,301	3,301	3,301	3,301	3,356	3,383	3,383	3,383	3,383	3,383	3,383
Lecturer (P13228)	-Total Salary	4,214	4,214	4,214	4,214	4,214	4,214	6,426	4,319	4,319	4,319	4,319	7,957	56,943
20000101 (1 20220)	Regular Salary	3,301	3,301	3,301	3,301	3,301	3,301	5,034	3,383	3,383	3,383	3,383	5,244	43,616
	Allowances													
	Bonus													
	Super	561	561	561	561	561	561	856	575	575	575	575	892	7,415
	Payroll Tax	230	230	230	230	230	230	350	236	236	236	236	436	3,107
	Workers Compensation	20	20	20	20	20	20	30	20	20	20	20	31	262
	Maternity Leave	20	20	20	20	20	20	30	20	20	20	20	31	262
	Long Service Leave	83	83	83	83	83	83	126	85	85	85	85	131	1,090
	Annual Leave Loading												1,192	1,192
	_On-Costs	913	913	913	913	913	913	1,392	936	936	936	936	2,713	13,327
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Occupation Type

Determines the type of employment against the position.

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				Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
		Occupation Type		SUB	SUB 💌	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB
			Position Fraction	0.5	CON HDA	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
			Distribution Percentage	100%	SUB	100%	100%	100%	100%	100%	100%	100%	100%	100%
			Full Time Equivalent	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
			Award	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA

Name	Label
Secondment	CON
Higher_Duty_Allowance	HDA
Substantive	SUB

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.

			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
		Occupation Type	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB
		Position Fraction	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	
		Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100
		Full Time Equivalent	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	
		Award	ACA	ACA	ACA 💌	ACA	ACA	ACA	ACA	ACA	ACA
		Status	CFT	CFT		CFT	CFT	CFT	CFT	CFT	CFT
		Step	1	1	ACET	1	1	1	1	1	
		Action	ACT	ACT	AG35 AG38	ACT	ACT	ACT	ACT	ACT	ACT
1.0 Employee Properties		Pay Multiples	2.0	2.0	AG40	2.0	2.0	2.0	3.0	2.0	
1.3 Manage Allowances		⊐Total Salary	14895	14895	14895	14895	14895	14895	22715	15268	152
2.0 On-Costs Assumptions	Professor (P11148)	Regular Salary	11668	11668	11668	11668	11668	11668	17793	11959	119

Name	Label
Academic	ACA
AWA_Academic	AACA
AWA_CET_Staff	ACET
AWA_General_35	AG35
AWA_General_38	AG38
AWA_General_40	AG40
Boundary_Lane_Childc	BLC
CET_Staff	CET
Common_Law_Contrac	CLC
Executive	EXE
General_35	G35
General_38	G38
General_40	G40
IAG	IAG
National_Training_Wag	NTW
No_Pay	NPY
Theatrical_Staff	ТНТ

Status

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

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	[
	Occupation Type	SUB	SUB										
	Position Fraction	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	
	Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
	Full Time Equivalent	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	
	Award	ACA	ACA										
	Status	CFT	CFT	CFT	CFT 💌	CFT	CFT						
	Step	1	1	1	CFT	1	1	1	1	1	1	1	
	Action	ACT	ACT	ACT	EXE	ACT	ACT						
	Pay Multiples	2.0	2.0	2.0	FPT	2.0	2.0	3.0	2.0	2.0	2.0	2.0	
	⊐Total Salary	14895	14895	14895	14895	14895	14895	22715	15268	15268	15268	15268	
Professor (P11148)	Regular Salary	11668	11668	11668	11668	11668	11668	17793	11959	11959	11959	11959	
	Allowances												

Name	Label
Continuing_Full_Time	CFT
Continuing_Part_Time	CPT
Executive	EXE
Fixed_Term_Full_Time	FFT
Fixed_Term_Part_Time	FPT

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.

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			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	De		
I		Occupation Type	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB		
I		Position Fraction	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5			
I		Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	:		
I		Full Time Equivalent	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5			
I		Award	ACA	ACET	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA		
I		Status	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT		
I		Step	3	3	3	3	3	3	3	3	3	3	3			
		Action	SSP	SSP 🚩	SSP	SSP	SSP	SSP	SSP	ACT	ACT	ACT	ACT	ACT		
		Pay Multiples	2.0		2.0	2.0	2.0	2.0	3.0	2.0	2.0	2.0	2.0			
1		⊐Total Salary	4214	MAT-MAT	4214	4214	4214	4214	6426	4319	4319	4319	4319			
1	Lecturer (P13228)	Regular Salary	3301	SSP TSF IN	3301	3301	3301	3301	5034	3383	3383	3383	3383			
		Allowances														
1		Bonus														

Name	Label
Active	ACT
Long_Service_Leave	LSL
Leave_Without_Pay	LWP
Mat_Half_Pay	МАН
Enhanced_Maternity_L(MAT-EML
Maternity_Leave	MAT-MAT
Sabbatical	SSP
Transfer_In	TSF_IN
Transfer_Out	TSF_OUT
Unpaid_Parental_Leave	UPL
Vacant	VAC

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.

- 1					Enhanced	1				
- 1					Matemity	Enhanced	Enhanced	Enhanced		
	Busby, Suzanne (1041511)	Discipline Executive Officer (P10920)	F0801	11201_PJ	Leave	Matemity Leave	Matemity Leave	Matemity Leave	Active	Active
- 1					Special					
					Studies	Special Studies	Special Studies	Special Studies	Special Studies	Speci
	Cheung, Stephen Lee-Yun (1004698)	Lecturer (P13228)	F0801	00000_PJ	Program	Program	Program	Program	Program	Progra
	Chakrabarty, Debajyoti (1029030)	Lecturer (P13227)	F0801	00000_PJ	Active	Active	Active	Active	Active	Active

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.

Help 🔂 🚮 🁌 Explore	- 🗄 🏟 (3 🧷 🖴	🍠 🚛 🐇	lin 🛍 🔤) 🖆 🖉 📃	Ì 💌 🕪	?					
	Save											
Scenarios: Foreca	st				🔀 Versio	ns: Working				🔍 Year	s: FY10	
; Operating (F0801)	<mark>∨</mark> ₩	Cheung, Ste	phen Lee-Yu	n (1004698)	~	Ma Teac	ning Academi	c (00000_PJ)			Go 🖌	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	De
Occupation Type	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB 🦉
Position Fraction	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	
Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	:
Full Time Equivalent	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	
Award	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA
Status	CPT	СРТ	CPT	CPT	СРТ	CPT	CPT	CPT	CPT	CPT	CPT	CPT
Step	3	3	3	3	3	3	3	3	3	3	3	
Action	ACT	SSP	SSP	SSP	SSP	SSP	ACT	ACT	ACT	ACT	ACT	ACT
Pay Multiples	2.0	2.0	2.0	2.0	2.0	2.0	3.0	2.0	2.0	2.0	2.0	
□Total Salary	4214	4214	4214	4214	4214	4214	6426	4319	4319	4319	4319	

The saved changes are shown below:

s Operating (F0801)	₩	Cheung, Ste	ephen Lee-Yu	n (1004698)	(1004698) V M Teaching Academic (00000_PJ) V M Go								
	Jan	Feb	Mar	Apr	Мау	Jun	Jul	Aug	Sep	Oct	Nov	De	
Occupation Type	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	SUB	
Position Fraction	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5		
Distribution Percentage	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	:	
Full Time Equivalent	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5		
Award	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	ACA	
Status	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	CPT	
Step	3	3	3	3	3	3	3	3	3	3	3		
Action	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	ACT	
Pay Multiples	2.0	2.0	2.0	2.0	2.0	2.0	3.0	2.0	2.0	2.0	2.0		
⊐Total Salary	4214	4214	4214	4214	4214	4214	6426	4319	4319	4319	4319		

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

Busby, Suzanne (1041511)	Discipline Executive Officer (P10920)	F0801	11201_PJ	Leave	Matemity Leave	Matemity Leave	Matemity Leave	Active	Active
Cheung, Stephen Lee-Yun (1004698)	Lecturer (P13228)	F0801	00000_PJ	Active	Active	Active	Active	Active	Active
Chakrabarty, Debajyoti (1029030)	Lecturer (P13227)	F0801	00000_PJ	Active	Active	Active	Active	Active	Active

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.

	🛅 Scenarios: Forecast					Versions: Working		GYears: F	Y10		
Page Accounting) Operating (F0201) 🗸 🗸	M C	Christodoulou, Demetris (1045699) 🛛 🖌 🕜 🕜								
			Jan	Feb	Mar	Apr - Click and drag to resize this column, or doubl App minimize and restore it	le-click to	Sep	Oct	Nc	
	Full FTE Allowance Rate (Fortnight)	00000_PJ									
	FTE Adjusted Allowances	00000_PJ									
Lecturer (P13161)	Market Loading Percentage	00000_PJ									
	= Percentage	00000_PJ									
	-Allowances	00000_PJ									
			<							>	
											=

Forms – On Costs Assumptions

		FY10	FY11
l		Forecast	Budget
	Payroll Tax %	5.95%	5.95%
	Workers Compensation %	0.60%	0.60%
	Long Service Leave %	2.5%	2.5%
	Maternity %	0.60%	0.60%
ľ	Annual Leave Loading %	1.35%	1.35%

Forms – Pay Periods per Month

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	=YearTotal
FY10	Forecast	2	2	2	2	2	2	3	2	2	2	2	3.1	26.1
FY11	. Budget	1.9	2	2	2	2	3	2	2	2	2	2	3.1	26
FY12	Budget	1.9	2	2	2	3	2	2	2	2	2	3	2.2	26.1

Forms – EBA & AWA Increments

Page	age EBA_Increase% 💌 Go													
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
FY10) Forecast	2%						2.5%						
FY11	. Budget	2.5%						2.5%						
FY12	2 Budget	2.5%						2.5%						

Page AWA_Increase% 💌 Go

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
FY10	Forecast	2%						2.5%					
FY11	Budget	2.5%						2.5%					
FY12	Budget	2.5%						2.5%					

Forms – Superannuation percentage

Q₂ Class Codes: Super%						🗟 Periods: BegBa	alance
1	Page Cheung, Step	hen Lee-Yun	(1004698) 💌	Economics Operating (F080	1) 🔻	Teaching Academic (00000_PJ) 💌	Go
		FY11					
l		Budget					
	Lecturer (P13228)	17%					

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
📁 <calculate -="" 1.0="" data="" employee="" form="" properties=""></calculate>
📁 Wrkforce - WFP - Change Employee Properties 👘
📁 Wrkforce - WFP - Add TBH - ACA
📁 Wrkforce - WFP - Add TBH - G35
📁 Wrkforce - WFP - Add TBH - G38
📁 Wrkforce - WFP - Add TBH - G40
📁 Wrkforce - WFP - Add TBH - Other
📁 Wrkforce - WFP - Change Position
📁 Wrkforce - WFP - Change RC & PC
📁 Wrkforce - WFP - Copy Employee Data
📁 Wrkforce - WFP - Clear Values

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

Hyperion® Planning – System 9 - Windows Internet Explorer	
🕜 🌈 Launch Business Rules - Windows Internet Explorer 👘 💶 🗙	l ion=WFP
Launch Business Rules	🖉 Run Time Prompts - Windows Internet Explorer
 Calculate Data Form - 1.0 Employee Properties> Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA Wrkforce - WFP - Add TBH - G35 Wrkforce - WFP - Add TBH - G38 Wrkforce - WFP - Add TBH - G40 Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Change Position 	Run Time Prompts - WFP - Add TBH - ACA
	s Operatir S Operatir S Select End Period Launch Close Positic S UE 0.5
	Full Time 0% Award ACA ACA ACA ACA

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	An 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+.

C Hyperion® Planning – System 9 - Windows Internet Explor	er				
🕢 🖉 Launch Business Rules - Windows Internet Explorer		ion=WFP			
Launch Business Rules			🖉 Run Time Prompts - Windows Internet Explorer		
Calculate Data Form - 1.0 Employee Properties - Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - CSA Wrkforce - WFP - Add TBH - CSA Wrkforce - WFP - Add TBH - CSA Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Change Position	4	s Operatir	Run Time Prompts - WFP - Add TBH - ACA		demic (0
		Occup	Launch Close		SUB
c		Positic		0	1.5
		Distrit		10	1%
		Full Tie			1.5
		Award	ACA ACA ACA	ACA	ACA

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:

	🖉 Launch Business Rules - Windows Internet Explorer		🔗 Run Time Prompts - Windows Internet Explorer 📃 🔲 🗙	
Fil	Launch Business Rules		Run Time Prompts - WFP - Add TBH - ACA	
	<pre><calculate -="" 1.0="" date="" employee="" form="" properties=""> Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA Wrkforce - WFP - Add TBH - G38 Wrkforce - WFP - Add TBH - G38 Wrkforce - WFP - Add TBH - G40 Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Change Position Help</calculate></pre>	×	Select a Year	Teach ar S 0.5
			1004698	100%
5			🐺 Select TBH Position Member	0.5
	2.0. On-Costs Accumptions		"LVA_TBH_1"	A
	2.2 EBA and AWA Increments 2.3 Superannuation Percentage		Select Employment Status	C 4 A
			🐺 Select the Classification (Level) for Pay Rate lookup	2.0
			"LVA"	3,589
	Lec	turer (P1322	Enter Step Number as Text - Ouotes needed	4,582
			"1"	3,589
			Launch Close	

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.

C CLaunch Business Rules - Windows Internet Explorer		=WEP	🏉 Run	Time Prompts - Windows Internet Explorer		I
Launch Business Rules			Run T	Fime Prompts - WFP - Change RC & PC		
 C-Calculate Data Form - 1.0 Employee Properties Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA Wrkforce - WFP - Add TBH - G35 Wrkforce - WFP - Add TBH - G38 			N	Select one or multiple Employees	A	
Wrkforce - WFP - Add TBH - G40 Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Change Position		/	ц.†	Select a Scenario "Budget"	A	
F	s 0	pera	ų,	Select a Year "FY11"	A	ing Acad
c		Occ Posi	CC.	Select a Start Month (FROM)	2	Apr UB 0
		Dist Full	w	Select a End Month (TO)	Ł	100
 2.0 On-Costs Assumptions 2.1 Pay Periods Per Month 2.2 EBA and AWA Increments 		Stat Step	щ†	Select the RC you want to change from	2	PT
2.3 Superannuation Percentage		Acti Pay Fort	ut.	Select the new RC	2	CT 2 3.58
	Lecturer (P13228)	=Tc R	ų	Select the Project Code you want to change "00000_PJ"	from	4,58
Business Rules for 1.0 Employee Properties		В	W.	Select the new Project Code	æ	61
Calculate Data Form - 1.0 Employee Properties>			Laur	nch Close		25

Clear Values:

This rule is particularly useful for deleting vacancies or correcting errors made.

🤕 🌈 Launch Business Rules - Windows Internet Explor	er _ 🗆 🗙	tion=V	🖉 Run	Time Prompts - Windows Internet Explorer	
Launch Business Rules			Run	Time Prompts - WFP - Clear Values	
 <calculate -="" 1.0="" data="" employee="" form="" li="" properti<=""> Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA Wrkforce - WFP - Add TBH - G3S Wrkforce - WFP - Add TBH - G3S </calculate>	es>		φ.	Select an Employee	
Wrkforce - WFP - Add TBH - G40 Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Change Position	•	3	w	Select a Position	
F Help				Į į	
		s Ope	1927	Select a RC "F0801"	ng Acader
		C	ov.	Select a Project Code	Apr JB
		C F	œ	Select a Year	100%
2.0 On-Costs Assumptions 2.1 Pay Periods Per Month 2.2 Pay Periods Per Month 2.2 Pay Periods Per Month		A	œ	Select the first month (FROM)	CA PT
 2.2 EBA and AWA Increments 2.3 Superannuation Percentage 		S A	œ	Select the last month (TQ)	4 2T
		F		<u></u>	3,589
	Lecturer (P132	228)	a.	Select a Scenario	4,582 3,589
		-	Lau	Close	
Business Rules for 1.0 Employee Properties		-			610
Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA		-			250

- 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:

C	🖉 Launch Business Rules - Windows Internet Explorer		ion=WFP	🌽 Run	Time Prompts - Windows Internet Explorer	_ 🗆 X		
F	Launch Business Rules			Run	Time Prompts - WFP - Change Position			
	 Calculate Data Form - 1.0 Employee Properties Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA Wrkforce - WFP - Add TBH - G35 Wrkforce - WFP - Add TBH - G36 Wrkforce - WFP - Add TBH - G30 	*		œ,	Select an Employee "1004698"	R		
	Wrkforce - WFP - Add TBH - Other Wrkforce - WFP - Change Position	-	3 / / /	100	Select a Position to Copy FROM	æ		
			s Operating	œ	Select a Position to Copy TO	æ	der	Versions nic (00000_P
			Occupa	œ	Select a Scenario			May SUB
			Positior		"Budget"	2	0.5	0.5
			Distribu Full Tim	00	Select a Year)%).5	100% 0.5
			Award		+111	~		ACA
	2.0 On-Costs Assumptions 2.1 Pay Periods Per Month		Status	1007	Select a Start Month (FROM)			CPT
	2.2 EBA and AWA Increments		Step			A	4	4
ľ	2.5 Superannuation Percentage		Action					ACT
			Pay Mu	1.00	Select a End Month (TO)		2.0	2.0
			Fortnigł		1	2	89	3,589
		Lecturer (P132	28)	Lau	nch Close		82	4,582
		20000101 (F102)	Regu				89	3,589

- 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.

🙋 🌈 Launch Business Rules - Windows Internet Explore	er _ 🗆 X	tion=WF	🏉 Run	Time Prompts - Windows Internet Explorer	_ 🗆 🗵		
Launch Business Rules			Run 1	Гіте Prompts - WFP - Сору Employee Data			
 <calculate -="" 1.0="" data="" employee="" form="" li="" properties<=""> Wrkforce - WFP - Change Employee Properties Wrkforce - WFP - Add TBH - ACA Wrkforce - WFP - Add TBH - G35 Wrkforce - WFP - Add TBH - G38 </calculate>	25>		u,	Select an Employee to Copy FROM "1004698"	Ł		_
Wrkforce - WFP - Add TBH - 040 Wrkforce - WFP - Add TBH - 0ther Wrkforce - WFP - Change Position	•	4 ,	w.	Select an Employee to Copy TO	A		Versions:
		s Oper	int	Select a Position to Copy FROM	A	Acader	mic (00000_PJ
		Oc	out.	Select a Position to Copy TO		\pr	May SUB
		Po			2	0.5	0.5
5		Dis	DOT 1	Select a RC to Copy FROM		100%	100%
		Ful		"F0801"	2	0.5	0.5
2.0 On-Costs Assumptions		- AN				<u> </u>	ACA
2.1 Pay Periods Per Month 2.2 EBA and AWA Increments		Ste	047	Select a RC to Copy TO		4	4
2.3 Superannuation Percentage		Ac				<u> </u>	ACT
		Pa	CKT	Select a Project Code to Copy FROM		2.0	2.0
		Foi		"00000_PJ"	2	3,589	3,589
		<u>—</u>	rat.			4,582	4,582
	Lecturer (P132	228)		Select a Project Code to Copy 10	D.	3,589	3,589
				ļ			
			1007	Select a Scenario			
Business Rules for 1.0 Employee Properties				"Budget"	Ł	610	610
Calculate Data Form - 1.0 Employee Properties> Wrkforce - WFP - Change Employee Properties			rat.	Calast a Yaan		250	250
Wrkforce - WFP - Add TBH - ACA				Select a rear	A	22	22
Wrktorce - WFP - Add TBH - G35 Wrktorce - WFP - Add TBH - G38				1		22	22
Wrkforce - WFP - Add TBH - G40			CR.T	Select a Start Month (FROM)		90	90
Wrkforce - WFP - Add TBH - Other					2	- 000	
Wrkforce - WFP - Change RC & PC		·	at .	Select a End Month (TO)		993	993
Wrkforce - WFP - Clear Values							
			_				
			Laur	nch Cloše			

Reporting Suite

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

<u>Navigate</u> ▼ <u>F</u> ile <u>E</u> dit <u>V</u> iew	Favorites Tools Help 📔 📂 🚮 👌 Exp	lore 🖆 🧏 🛝 🧕 🚧 🗸	P 💣 🖨 🖻	
/Hyperion Financial Reportin	g/Finance Reports/8. Workforce Planning R	Reports		
Folders 📦 🕫	Name 🔺	Туре	Modified	Description
- 🍘 Root	1. Class Code by RC, PC, Emp & Pos	Financial Reporting Report	7/19/10 2:29 PM	Class Code by RC, PC, Employee & Position
+ 🔗 Administration	2. Class Code by Pos & Employ	Financial Reporting Report	7/19/10 2:29 PM	Class Code by Position & Employee Report
📔 Bay plugin	3. Leave Report	Financial Reporting Report	7/19/10 2:29 PM	Leave Report
+ Broadcast Messages	4. FTE Report	Financial Reporting Report	7/19/10 2:32 PM	FTE Report
- 🤗 Hyperion Financial Reporting	5. Detailed Report by RC, PC, Emp & Pos	Financial Reporting Report	7/19/10 2:41 PM	Detailed Report by RC, PC, Employee & Position
Academic Researchers F	er 6. Detailed Report for One Employee	Financial Reporting Report	7/19/10 2:41 PM	Detailed Report for One Employee
+ 🧭 Finance Adhoc Analysis	7. FTE & Salary by Classification	Financial Reporting Report	7/19/10 2:42 PM	FTE & Salary by Classification Report
+ 📔 Finance Queries	8. FTE & Salary by Project Code	Financial Reporting Report	7/19/10 2:44 PM	FTE & Salary by Project Code Report
- 📁 Finance Reports	9. Fixed Term Employees	Financial Reporting Report	7/19/10 2:45 PM	Fixed Term Employee Report
🛨 🃁 1. Financial Manage	me			
🖭 🃁 3. Specially Request	red			
🖭 🃁 4. Planning Reports				
📁 5. Finance Committe	ee I			
🛨 🎁 6. Statutory Related	1R			
🞁 8. Workforce Planni	ng			
🛨 📁 User Specific Reports				

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.

ass Codes: T	otal_Salary	📲 Responsibility Centres: F0801	♀ Project Codes: ALLPROJECTS_P	נ					
🚰 THE UN	IVERSITY O	F SYDNEY C	ass Code by RC, PC, Em	oloyee & Po	osition I	Report f	for Ecor	omics	Operat
Jser Selection (ear: FY11 Cla Responsibility Project Code: . Scenario: Budg	<u>on:</u> Iss Code: Total Centre: Econo All Projects/Gr get Version: W	Salary mics Operating (F0801) ants(ALLPROJECTS_PJ) 'orking	Grid POV+ Years+ FY	11 Scenaric	os: Buda	Report Report Reques Report	Date: 20-Jul- Data as of: t Name: s_c Ref: 1. Class	2010 8:15 A hung S Code by R	M C, PC, Em atus: St
Responsibi	lityProject				or budg				
Centre	Code	Employee	Position	YearTotal	Jan	Feb	Mar	Apr	May
Centre F0801	Code 00000_PJ	Employee	Position Associate Professor (P13224)	YearTotal 164.750	Jan 11,778	Feb 12,538	Mar 12,538	Apr 12,538	May 12,538
Centre F0801 F0801	Code 00000_PJ 00000_PJ	Employee	Position Associate Professor (P13224) Professor (P11148)	YearTotal 164,750 177,024	Jan 11,778 12,631	Feb 12,538 13,460	Mar 12,538 13,460	Apr 12,538 13,460	May 12,538 13,460
Centre F0801 F0801 F0801	Code 00000_PJ 00000_PJ 00000_PJ	Employee Status construction of the Sample of the second status Same Carlot and Status	Position Associate Professor (P13224) Professor (P11148) Chair in Economics (P27556)	YearTotal 164.750 177.024 203.022	Jan 11,778 12,631 16,420	Feb 12,538 13,460 17,498	Mar 12,538 13,460 17,498	Apr 12,538 13,460 17,498	May 12,538 13,460 17,498

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.

Jser Selection: /ear: FY11 Class Code: Total Sa	alary		-		-		
Responsibility Centre: Disciplin Project Code: All Projects/Grants Scenario: Budget Version: Work	es and Centres (F5000_DISCP_CENTRES) s(ALLPROJECTS_PJ) king)	- DOV:	- EV11 C	and an Ded		
		Grid	POV: Years	<u>s: Fril Sce</u>	manos: Bud	<u>get versions</u>	s: wor
Position	Employee	YearTotal	Jan	Feb	Mar	Apr	May
Position Director - Academic (P10127)	Employee Gallop, Geoffrey Ian (1046031)	YearTotal 286,309.05	Jan 20,314.26	Feb 21,647.41	Mar 21,647.41	Apr 21,647.41	May 21,64
Position Director - Academic (P10127) Associate Lecturer (P13206)	Employee Gallop, Geoffrey Ian (1046031) Coffey, Josephine Margaret (1002413)	YearTotal 286,309.05 52,624.94	Jan 20,314.26 3,671.21	Feb 21,647.41 3,912.11	Mar 21,647.41 3,912.11	Арг 21,647.41 3,912.11	May 21,64 3,91
Position Director - Academic (P10127) Associate Lecturer (P13206) Associate Lecturer (P13211)	Employee Gallop, Geoffrey Ian (1046031) Coffey, Josephine Margaret (1002413) Ip, Mary (1003744)	YearTotal 286,309.05 52,624.94 52,624.94	Jan 20,314.26 3,671.21 3,671.21	Feb 21,647.41 3,912.11 3,912.11	Mar 21,647.41 3,912.11 3,912.11	Apr 21,647.41 3,912.11 3,912.11	May 21,64 3,91 3,91
Position Director - Academic (P10127) Associate Lecturer (P13206) Associate Lecturer (P13211) Associate Lecturer (P13249)	Employee Gallop, Geoffrey Ian (1046031) Coffey, Josephine Margaret (1002413) Ip, Mary (1003744) Liu, Yao Zhou Franklin (1044358)	YearTotal 286,309.05 52,624.94 52,624.94 10.65	Jan 20,314.26 3,671.21 3,671.21 7,30	Feb 21,647.41 3,912.11 3,912.11	Mar 21,647.41 3,912.11 3,912.11	Apr 21,647.41 3,912.11 3,912.11	May 21,64 3,91 3,91

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.

sponsibility Centres: F0801 🖓	Project Codes: ALLPROJECTS	5_PJ						
THE UNIVERSITY OF SYD	DNEY Lea	ave Repor	t for Econ	omics	Operati	ng (F080	1)	
Jser Selection:					Report Date:	19-Jul-2010 3	3:54 PM	
ear: FY11 Class Code: Action					Report Data	as of:		
Responsibility Centre: Economics (Operating (F0801)				Request Nan	ne: s_chung		
roject Code: All Projects/Grants(Al	LPROJECTS_PJ)				Report Ref: 3	3. Leave Repo	rt	
cenario: Budget Version: Working					-			
		Grid POV	Class Code	s: Acti	on Years	EV11 Sc	enarios: F	Nudaet V
		Bosponsik	ilityProject					
Employee	Position	Centre	Code	Jan	Feb	Mar	Apr	Ma
No Employee	Associate Lecturer (P13266)	F0801	00000_PJ	Vacant	Vacant	Vacant	Vacant	Vacant
No Employee	Lecturer (P13236)	F0801	00000_PJ	Vacant	Vacant	Vacant	Vacant	Vacant
No Employee	Lecturer (P20167)	F0801	00000_PJ	Vacant	Vacant	Vacant	Vacant	Vacant
No Employee	Senior Lecturer (P13250)	F0801	00000_PJ	Vacant	Vacant	Vacant	Vacant	Vacant
No Employee	Senior Lecturer (P24239)	F0801	00000_PJ	Vacant	Vacant	Vacant	Vacant	Vacant
Aspromourgos, Anthony (1000893)	Professor (P11148)	F0801	00000_PJ	Active	Active	Active	Active	Active
Agastya, Murali Krishna (1012906)	Associate Professor (P13224)	F0801	00000_PJ	Active	Active	Active	Active	Active
Andrew, Richard Marcus (1023579)	Admissions Officer (P16864)	F0801	51081_PJ	Active	Active	Active	Active	Active
. ,	. ,					Special	Special	Special
						Studies	Studies	Studies
Birulin, Oleksii (1038738)	Lecturer (P13226)	F0801	00000_PJ	Active	Active	Program	Program	Program
Busby, Suzanne (1041511)	Discipline Executive Officer (P10920)	F0801	11201 PJ	Active	Active	Active	Active	Active
Cheung, Stephen Lee-Yun	· · · · · · · · · · · · · · · · · · ·							
(100,1000)	1 . (D10000)	E0001			A			

4.0 FTE Report

e Reports/8. Workforce Planning Reports/4. 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.

THE UNIVERSITY OF SY	DNEY			FTE (F500	Report 00_DIS	for Di	sciplin ENTRI	ies an ES)	d Cen	tres			
Iser Selection: (car: EV11 Class Code: Full Time Equive	lant												
canonaibility Control Dissiplings and (Controp (EEO)		CENTRES										
esponsibility Centre: Disciplines and (Uentres (F500	U_DISCP_	_CENTRES	»)									
'roject Code: All Projects/Grants(ALLPR	(OJECTS_PJ)												
cenario: budget version: working													
Grid POV: Class Codes: F	TE Years:	FY11	Scenar	ios: Bu	dget Ve	ersions:	Workir	ng Posi	tions: F	Position	s Stati	us: Sta	tus
Grid POV: <u>Class Codes: F</u>	TE Years:	FY11	Scenar	ios: Bu	dget <u>Ve</u>	ersions:	Workir	ng <u>Posi</u>	tions: F	Position	<u>s Stat</u>	us: Sta	tus
Grid POV: <u>Class Codes: F</u> Employee	TE Years: YearTotal	FY11	Scenar Feb	ios: Bu Mar	dget <u>Ve</u> Apr	May	Workir Jun	ng <u>Posi</u> Jul	tions: F	Position Sep	<u>s Statu</u> Oct	us: Sta Nov	tus De
Grid POV: <u>Class Codes: F</u> Employee Aspromourgos, Anthony (1000893)	TE Years: YearTotal 1.00	<u>FY11</u> Jan 1.00	Scenar Feb	ios: Bu Mar 1.00	<u>dget Ve</u> <u>Apr</u> 1.00	May 1.00	Uorkir	ng <u>Posi</u> Jul 1.00	tions: F Aug 1.00	Position Sep 1.00	<u>Statu</u> Oct 1.00	us: Sta Nov 1.00	tus De
Grid POV: <u>Class Codes: F</u> Employee Aspromourgos, Anthony (1000893) Arthur, Neal Harold (1001338)	TE Years: YearTotal 1.00 1.00	FY11 Jan 1.00 1.00	<u>Scenar</u> Feb 1.00 1.00	<u>Mar</u> 1.00	<u>Apr</u> 1.00 1.00	May 1.00	<u>Jun</u> 1.00	ng Posi Jul 1.00 1.00	tions: F Aug 1.00 1.00	Sep 1.00	oct 0ct 1.00 1.00	us: Sta Nov 1.00 1.00	De
Grid POV: <u>Class Codes: F</u> Employee Aspromourgos, Anthony (1000893) Arthur, Neal Harold (1001338) Areni, Charles (1004870)	<u>YearTotal</u> 1.00 1.00 1.00	Jan 1.00 1.00 1.00	Scenar Feb 1.00 1.00 1.00	<u>Mar</u> 1.00 1.00 1.00	Apr 1.00 1.00 1.00	May 1.00 1.00 1.00	Workir Jun 1.00 1.00 1.00	1.00	tions: F Aug 1.00 1.00 1.00	Sep 1.00 1.00 1.00	<u>Statu</u> Oct 1.00 1.00 1.00	Nov 1.00 1.00 1.00	De
Grid POV: <u>Class Codes: F</u> Employee Aspromourgos, Anthony (1000893) Arthur, Neal Harold (1001338) Areni, Charles (1004870) Agastya, Murali Krishna (1012906)	<u>YearTotal</u> 1.00 1.00 1.00 1.00	Jan 1.00 1.00 1.00 1.00	Scenar Feb 1.00 1.00 1.00 1.00	Mar 1.00 1.00 1.00 1.00 1.00	Apr 1.00 1.00 1.00 1.00 1.00	May 1.00 1.00 1.00 1.00 1.00	Workir	1.00 1.00 1.00 1.00 1.00	tions: F Aug 1.00 1.00 1.00 1.00	205ition 5ep 1.00 1.00 1.00 1.00	<u>S Statu</u> 0ct 1.00 1.00 1.00 1.00	Nov 1.00 1.00 1.00 1.00 1.00	De
Grid POV: <u>Class Codes: F</u> Employee Aspromourgos, Anthony (1000893) Arthur, Neal Harold (1001338) Areni, Charles (1004870) Agastya, Murali Krishna (1012906) Andrew, Richard Marcus (1023579)	TE Years: YearTotal 1.00 1.00 1.00 1.00 1.00	Jan 1.00 1.00 1.00 1.00 1.00	Scenar Feb 1.00 1.00 1.00 1.00 1.00	Mar 1.00 1.00 1.00 1.00 1.00 1.00	Apr 1.00 1.00 1.00 1.00 1.00 1.00 1.00	May 1.00 1.00 1.00 1.00 1.00 1.00	Workir Jun 1.00 1.00 1.00 1.00 1.00	ng Posi Jul 1.00 1.00 1.00 1.00 1.00	tions: F Aug 1.00 1.00 1.00 1.00 1.00	Sep 1.00 1.00 1.00 1.00 1.00 1.00 1.00	S Statu Oct 1.00 1.00 1.00 1.00 1.00 1.00	Nov 1.00 1.00 1.00 1.00 1.00 1.00	De
Grid POV: <u>Class Codes: F</u> Employee Aspromourgos, Anthony (1000893) Arthur, Neal Harold (1001338) Areni, Charles (1004870) Agastya, Murali Krishna (1012906) Andrew, Richard Marcus (1023579) Anthony, Christina (1030107)	TE Years: YearTotal 1.00 1.00 1.00 1.00 0.38	Jan 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	Scenar Feb 1.00 1.00 1.00 1.00 1.00 1.00 1.00	Mar 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	Apr 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	May 1.00 1.00 1.00 1.00 1.00 1.00 0.55	Workir Jun 1.00 1.00 1.00 1.00 1.00	1.00 1.00 1.00 1.00 1.00 1.00	tions: F Aug 1.00 1.00 1.00 1.00 1.00	Sep 1.00 1.00 1.00 1.00 1.00 1.00 1.00	s <u>Statu</u> Oct 1.00 1.00 1.00 1.00 1.00 1.00	Nov 1.00 1.00 1.00 1.00 1.00	De

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.

sponsibility Ce	ntres: F080	1 🖓 Project	Codes: ALLPR	OJECTS_PJ									
THE UNIT	VERSITY O	F SYDNEY		Detaile	ed Rej	port by RC, PC	Employee & F	Position f	for Econ	omics	Operating	g (F080	1)
Iser Selection ear: FY11 Proje esponsibility C cenario: Budge	<u>n:</u> ect Code: All Centre: Econo et Version: W	Projects/Grants omics Operating /orking	(ALLPROJECTS (F0801)	S_PJ)				Re Re Re	port Date: 2 port Data as quest Name port Ref: 5. 1	0-Jul-2010 8 ; of: : s_chung Detailed Re	8:27 AM port by RC, PC), Emp & Po	DS
		Grid	POV: <u>Perio</u>	ds: YearTe	<u>otal Ye</u>	ears: FY11 Scena	arios: Budget Ve	ersions: V	<u>Vorking</u> S	status: 9	<u>Status</u>		
Responsibilit Centre	tyProject Code	Employee ID	Employee Name	Position		POS CAT	Level	Step	Full Time Equivalent	Regular Salary	Allowances	On-Costs	Total Salary
				Associate Lecturer									
F0801	00000_PJ	No_Employee		(P13266) Lecturer (P13236)	ACA		LVA	1	0.5	29,700) -	2,911	93 175
F0801	00000_PJ	No_Employee	No Employee	Lecturer (P20167)	ACA		LVB	6	1.0	100,767	, .	9,875	110,642
F0801	00000 PJ	No Employee	No Employee	Senior Lecturer (P13250)	ACA		LVC	1	1.0	103,948) -	10,187	114,134
E0801	00000 PJ	No Employee	No Employee	Senior Lecturer (P24239)	ACA		LVC	1	10	103 948		10 187	114 134
F0801	00000 P I			Professor	ACA		IVE		1.0	161 224		15,800	177.024
F0801	00000_PJ	1012066-374	-quick-a Maria Maria - Turi Maria - Turi	Associate Professor (P13224)	ACA		LVD	4	1.0	137,884	12,574	14,292	164,750

6.0 Detailed Report for One Employee

Jser Selec 'ear: FY11 F Responsibili Scenario: Bu	<u>tion:</u> Project Code: All ty Centre: Facult idget Version: W	Projects/Grants(ALLPROJE0 y of Medicine (K0000_MEDI0 orking	CTS_PJ) CINE) Emplo	yee: sant, san		w(1223224)				Report Report Reques Report
		iods: VearTotal Vea	rs: FY11	Scenario	os: Bude	aet Versio	ons: Wo	orking Sta	tus: Sta	tus
G	ria POV: <u>Pei</u>	<u>ious. rearrotai rea</u>				100 0.0.0.				cab
G Responsil Centre	bilityProject Code	Position	POS CAT	Level	Step	Full Time Equivalent	Regular Salary	Allowances	On-Costs	Total Salary
Gi Responsil Centre K9495	hilityProject Code R2849_PJ	Position Clinical Trials Coordinator (P16907)	GEN	Level	Step 4	Full Time Equivalent 0.1	Regular Salary 9,321	Allowances	On-Costs 914	Total Salary 10,235
Gi Responsil Centre K9495 K9495	hilityProject Code R2849_PJ R2850_PJ	Position Clinical Trials Coordinator (P16907) Clinical Trials Coordinator (P16907)	GEN	Level	Step 4	Full Time Equivalent 0.1 0.1	Regular Salary 9,321 9,321	Allowances	On-Costs 914 914	Total Salary 10,235 10,235

7.0 FTE and salary by Classification Report

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

	Planning Reports/7. P	TE & Salary b	/ Classification
esponsibility Centres: F0	0801 🖣 Project Co	des: ALLPROJE	стѕ_рј
THE UNIVERSITY	OF SYDNEY		ETE & Salary by Classification Report for Economics
THE UNIVERSITI	OF SIDNET		The a balary by classification report for Economics
User Selection:			Report Date: 19-
Year: FY11 Project Code:	All Projects/Grants(AL	LPROJECTS PJ) Report Data as o
Responsibility Centre: Ec	onomics Operating (F0	Request Name: s	
Scenario: Budget Version	: Working	Report Ref: 7. FT	
Grid DOV/ Deriode	VoarTotal Voar		marios: Budget Versions: Working Employees: Employees
ond FOV. <u>Ferious</u> .		<u>5. 1111 500</u>	andnos, budget versions, working employees, employees
	Full Time Equivalent	Total Salary	
Level A	Full Time Equivalent 0.8	Total Salary 54.917	
Level A Level B	Full Time Equivalent 0.8 12.5	Total Salary 54,917 1,326,928	
Level A Level B Level C	Full Time Equivalent 0.8 12.5 12.0	Total Salary 54,917 1,326,928 1,510,551	
Level A Level B Level C Level D	Full Time Equivalent 0.8 12.5 12.0 5.0	Total Salary 54,917 1,326,928 1,510,551 784,402	
Level A Level B Level C Level D Level E	Full Time Equivalent 0.8 12.5 12.0 5.0 4.0	Total Salary 54,917 1,326,928 1,510,551 784,402 762,695	
Level A Level B Level C Level D Level E ACA	Full Time Equivalent 0.8 12.5 12.0 5.0 4.0 34	Total Salary 54,917 1,326,928 1,510,551 784,402 762,695 4,439,494	

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.

e Reports/8. Workforce Planning Reports/8. FTE & Sala	ry by Project	Code					
THE UNIVERSITY OF SYDNEY	FTE & Sa	alary by Pi	roject Cod	e Report	for Econo	omics Ope	erating (F08
User Selection: Year: FY11 Class Code: FTE & Total Salary Responsibility Centre: Economics Operating (F0801) Project Code: All Projects Scenario: Budget Version: Working					Repo Repo Requ Repo	rt Date: 19-Jul-2 rt Data as of: est Name: s_ch rt Ref: 8. FTE &	010 4:04 PM ung Salary by Project
Grid POV: Periods: YearTotal Years: FY11	Scenarios:	Budget Ve	ersions: Wo	rking Em	ployees: E	mployees S	Status: State
	A	CA	GEI	N	То	tal	
	Full Time Equivalent	Total Salary	Full Time Equivalent	Total Salary	Full Time Equivalent	Total Salary	
Learning and Teaching (LEARNING_&_TEACHING_PJ)	34	4,439,494	3	218,823	37	4,658,317	
Professional Services and UWC (PROF_SERV_UWC_PJ)	-	-	1	80,764	1	80,764	
Care (CODE DI)	34	4,439,494	4	299,587	38	4,739,080	

9.0 Fixed Term Employee Report

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

🚱 Class Codes: Total_Salary 🖓 Responsibility Centres: F0801 🖓 Project Codes: ALLPROJECTS_PJ

😤 THE UNI	THE UNIVERSITY OF SYDNEY Fixed Term Employee Report for Economics Operating (F0801)										
User Selectic Year: FY11 Clas Responsibility Project Code: A Scenario: Budg	on: ss Code: Total & Centre: Econor All Projects/Gra et Version: Wo	Salary nics Operating (F0801) nts(ALLPROJECTS_PJ) rking								Report Dat Report Dat Request Na Report Ref	
	Grid POV: Years: FY11 Scenarios: Budget Versions: Working										
Responsibil Centre	ityProject Code	Employee	Position	Status	YearTotal	Jan	Feb	Mar	Apr	May	
F0801	00000_PJ	No Employee	Associate Lecturer (P13266)	Fixed Term Part Time	32,611	2,327	2,480	2,480	2,480	2,480	
F0801	00000_PJ	No Employee	Lecturer (P13236)	Fixed Term Full Time	93,175	6,648	7,084	7,084	7,084	7,084	
F0801	00000_PJ	No Employee	Senior Lecturer (P24239)	Fixed Term Full Time	114,134	8,144	8,678	8,678	8,678	8,678	
F0801	00000_PJ 🗧	Checkerer (Children)	Associate Lecturer (P17897)	Fixed Term Part Time	17,428	2,540	2,707	2,707	2,707	2,707	
F0801	00000_PJ	(Catalogue and Except (** (1020-54)	Associate Lecturer (P22839)	Fixed Term Full Time	4,933	4,919	14	-	-		
F0801	00000_PJ	Con Yells Booth depkilled 1044 (1051	Associate Lecturer (P13249)	Fixed Term Part Time	7	7					

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.