Infor Dynamic Enterprise Performance Management Workforce Planning User Guide

Release 11.2.x

Contents

Contents

About this guide

This guide provides end user documentation for the Infor Workforce Planning application.

Intended audience

This guide is intended for all end users of Workforce Planning.

Organization

This table describes the chapters of this guide:

Chapter	Description
"Overview" on page 7	This chapter describes the Workforce Planning module and indirect labor planning.
"Workforce Planning configuration" on page 11	This chapter describes how to configure Workforce Planning.
"Driver values" on page 17	This chapter provides information about importing and modifying driver values.
"Assignment report" on page 19	This chapter describes how to configure and perform the FTE calculation.
"Transferring Workforce Planning data" on page 23	This chapter describes how to transfer data between cycles or versions.
"Reporting" on page 25	This chapter describes the reports that are available for the Workforce Planning module.

Related documents

You can find the documents in the documentation section on the Infor Xtreme Support portal.

Administrators

Refer to these guides:

- *Infor Dynamic Enterprise Performance Management Platform Support Guide*
- *Infor Dynamic Enterprise Performance Management Release Notes*
- *Infor Dynamic Enterprise Performance Management Installation Guide*
- *Infor Dynamic Enterprise Performance Management Administration Guide*
- *Infor Dynamic Enterprise Performance Management Configuration Guide for Infor ION*
- *Infor Dynamic Enterprise Performance Management (Single Tenant) Integration Guide for Infor CloudSuite Financials & Supply Management (Multi-tenant)*
- *Infor Dynamic Enterprise Performance Management Integration Guide for Infor CloudSuite Financials & Supply Management: Single Tenant or On-premises*
- *Infor Dynamic Enterprise Performance Management Integration Guide for PM Source Views*
- *Infor Dynamic Enterprise Performance Management Table-based Integration Guide*

See the *Infor BI Hardware Recommendations Guide* for hardware recommendations and sizing considerations.

See the *Infor BI Installation Guide* for details on installing Infor BI.

Users

Refer to these guides:

- *Infor Dynamic Enterprise Performance Management Budgeting & Planning User Guide*
- *Infor Dynamic Enterprise Performance Management Financial Consolidation User Guide*
- *Infor Dynamic Enterprise Performance Management Workforce Planning User Guide*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Overview

<div style="color:red">**1**</div>

Infor Workforce Planning is an Infor Dynamic Enterprise Performance Management application that is used for labor planning.

With Workforce Planning, you can perform indirect labor forecasting based on input parameters or drivers, with performance calculations such as labor utilization and efficiency. The focus of Workforce Planning is to determine the headcount or full time equivalent (FTE), that is required to cover the workload or additional work requirements of a process. One FTE is equivalent to one employee working full time.

The main goal of Workforce Planning is to forecast the number of employees for certain periods and to calculate operating figures to support management in their decisions, whereas Workforce Budgeting is used to calculate the cost of the workforce.

Indirect labor planning

The main focus of indirect labor planning is calculating the number of employees needed to perform work that is not directly accountable to a particular product.

In most cases, forecasting of indirect labor numbers is performed based on key operating indicators. These indicators, or parameters, are referred to as drivers. Workers who perform indirect labor are not directly involved in the production of goods. Therefore, it may be difficult to calculate the necessary number of employees based solely on planned sales figures. To address that complexity, we use parameters.

An example of a parameter can be the number of shipments that drives the headcount in a logistics department. A company can define as many parameters as needed.

Navigation

The Workforce Planning page includes these panes:

• The **Configuration** pane displays links to configuration-related pages for Workforce Planning.

- The **Data Entry** pane displays the link to the Driver Value Report page.
- The **Data Transfer** pane displays a link to a page that you can use to copy data between cycles or between versions.
- The **Reporting** pane contains links to reports that you can use to compare the results of your workforce planning calculations.

This table describes the toolbar buttons, icons, and options for Workforce Planning navigation:

Option	Description
⚙	Open the Set Global Context dialog box where you select the cycle, version, and entity. This must be done before accessing any application pages.
◀	Return to the previous page or dashboard, depending on context.
⌂	Go to the Infor d/EPM page.
▼ / ▲	Move up and down the pages.
+	Add an item.
📁	Import driver values.
📄	Export the page to a Microsoft Excel `.xlsx` file.
📄	Export the page to an Adobe Acrobat PDF file.
📄	Export the page to a Microsoft PowerPoint file.
⭐	Add the page to Favorites.
🗑	Delete the selected item.
→	Change the context for the Workforce Planning report or page.
📋	View or change the configuration details.

Workforce Planning workflow

This section walks you through the steps in the Infor Workforce Planning workflow.

Implementation

Before you start working with Workforce Planning, these steps are typically performed by the implementation team:

- The dimensions are defined and the alternate hierarchies are used.
- The employee data is imported.

d/EPM

Ensure that the business configuration is performed. That is, cycles and versions for Workforce Planning are created.

See the "Business configuration" section of the *Infor Dynamic Enterprise Performance Management Budgeting & Planning User Guide*.

Workforce Planning application

The Workforce Planning procedures and their typical order are listed here:

1 Perform Workforce Planning configuration.

See "Workforce Planning configuration" on page 11.

2 Define calculation methods and their dimensionality.

See "Defining a calculation method" on page 12.

3 Optionally, add units of measure.

Workforce Planning provides standard units of measures and unit families. If your data uses units that are not included in the application, you can add them.

See these topics:

- "Adding units of measure" on page 15
- "Adding a family" on page 15

4 Create driver categories and drivers.

See these topics:

- "Creating a driver category" on page 13
- "Creating a driver" on page 14

5 Upload driver values.

You can upload driver values on a regular basis, for example, monthly. If you upload values for a specific month several times, the values are overwritten. Only the last uploaded driver values for a given month are stored and used for calculation.

See "Importing driver values" on page 17.

6 Configure and calculate the assignment report.

See "Calculating the FTE" on page 20.

7 Optionally, copy your data to a different cycle or version.

See "Transferring Workforce Planning data" on page 23.

8 Optionally, use the comparison reports to compare the actual data with the calculated data.

See "Reporting" on page 25.

Workforce Planning configuration

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This chapter describes the configuration process.

Setting up the dimensions and alternate hierarchies

The steps described here set up the dimensions and alternate hierarchies.

1 Start Designer.
2 Select the Planning database.
3 Select **Configuration > Planning Settings**.
4 Click the **Common Settings** tab.
5 In the Settings column for Workforce Planning Dimension Settings, click the **Click here to change** text.
6 Activate all dimensions except the Entities dimension.
7 Synchronize the dimensions.
   If you plan to use the demo data, do not synchronize the WBDJOB dimension.
8 Recreate the database.

Configuring the cycles

Before you configure Workforce Planning, ensure that business configuration and planning cycle definition are completed.

The created cycle to be used in labor planning must overlap with the current period.

1 Click the **Home** icon.
2 Click **d/EPM Applications**.
3 Click **Workforce Planning**.
4 Click **Workforce Planning Configuration**.

The Infor Workforce Planning Configuration wizard opens.

5 Review the cycle and version information and click **NEXT**.

The cycle and version are inherited from global context variables. You must configure each cycle and version combination before you can start using them in Workforce Planning.

To change the cycle or version, you must edit the global variables.

6 Select the use of entities in planning.

Labor Planning across Entities enabled
This selection means that the labor planning is performed across all entities. The structure to be used for labor planning is not restricted by the entity dimension.

7 Click **NEXT**.

8 Select the organization hierarchy to be used in labor planning.

The organization selection is cycle-specific and your selection is inherited for all versions within the cycle. If the organization was already selected for another version within the same cycle, you cannot modify it.

9 Click **CLOSE**.

Defining a calculation method

A calculation method defines how the labor planning is performed. You can define, activate, or deactivate calculation methods.

1 Click the **Home** icon.

2 Click **d/EPM Applications**.

3 Click **Workforce Planning**.

4 Click **Define Calculation Method**.

5 Click the plus icon to add a new calculation method.

6 Specify this information:

Name
Specify the name of the calculation method.

Description
Optionally, add a description of the calculation method.

Maximum Data Range
Select the maximum number of periods for the calculation method. The data range value that is next to the minus icon represents the number of previous periods. The data range value that is next to the plus icon represents the number of future periods.

Default Data Range
Select the default number of periods for the calculation method. The default data range determines for how many forecast periods the data is displayed in reports. The values of the default data range are populated from the maximum data range that is selected.

Dimensions
Select dimensions to be activated for labor planning. At least one dimension must be activated. The maximum of three dimensions can be activated for any calculation method. You can drag and drop dimensions in the list to assign their priorities.

7 Click **SAVE**.

Driver and Driver Categories

Use the Driver and Driver Category page to create new and edit existing drivers and driver categories. You can also assign dimensions to the drivers. The Driver and Driver Category page contains these tabs:

- The **Driver Categories** tab lists the driver categories, the date that each category was added, description, and if the driver category is activated.

  To filter the driver category that you want to view, click the selected category. To remove the filter and view all drivers, click the filter icon.

- The **Drivers** tab lists the drivers, with their usage, name, description, contact person, unit of measure, driver type, and driver category. This tab also shows if the driver is activated and contains links to the **Driver Dimensions** tab. You can select or deselect a driver to activate or deactivate it. You cannot deactivate a driver that is used in labor planning in any active cycle for the current period. If a base driver is used to calculate any active driver, you cannot deactivate that base driver.

- The **Driver Dimensions** tab lists all the drivers with their categories and activated dimensions for the selected cycle and version. You can change the cycle and version that you want to view.

Creating a driver category

Each driver must be assigned to a driver category. Use the Driver and Driver Category page to view existing and add new driver categories.

1 Click the **Home** icon.

2 Click **d/EPM Applications**.

3 Click **Workforce Planning**.

4 Click **Driver and Driver Category Definition**.

5 Click **ADD NEW CATEGORY**.

6 Specify the name of the new category.

7 Optionally, specify the description of the driver category.

8 Click **SAVE**.

Creating a driver

1 Click the **Home** icon.
2 Click **d/EPM Applications**.
3 Click **Workforce Planning**.
4 Click **Driver and Driver Category Definition**.
5 Click the **Go to Drivers**.
6 Click **CREATE NEW DRIVER**.
7 Specify this information:

   Category
   Select the driver category.

   Driver Type
   Select if the new driver is a base driver or a calculated driver.

   A calculated driver uses values from one or more other drivers. The calculated driver definition can consist of two or more drivers and these basic operators: *****, **/**, **+**, and **-**. If you use numeric constants in your driver formula, use these operators: ***** and **/**.

   Driver Name
   Specify the driver name. Drivers in each driver category must have unique names.

   Description
   Optionally, provide a description of the driver.

   Unit of Measure
   Select the unit of measure for the driver.

   Contact Person
   Optionally, select the contact person from the list. You can create attribute presets that define the sets of attributes that are visible. By default, the name and the ID of a person are added to the attribute preset.

8 If you are creating a base driver, click **NEXT** and select dimensions for the driver.

   All dimensions that were activated in the global configuration for the selected cycle and version are listed.

   See "Defining driver dimensions" on page 14.

9 Click **SAVE**.

Defining driver dimensions

For each base driver, you must define at least one dimensions. By selecting the dimensions, you define the granularity of the driver values.

For example, if the driver, the number of PCs, is set to use the organization dimension, the driver values are entered for specific elements in this dimension. You can enter different values for the number of PCs for different departments, such as the IT department, or for the whole organization.

For a calculated driver, its dimensionality is based on the dimensionality of the base drivers that are used to calculate the driver. Therefore, you cannot modify dimensions for calculated drivers.

1   Click the **Home** icon.

2   Click **d/EPM Applications**.

3   Click **Workforce Planning**.

4   Click **Driver and Driver Category Definition**.

5   Click **Driver Dimensions**.

6   Optionally, select the cycle and version that you want to view.

7   To filter the drivers and view only one driver or driver category, click the selected driver or category. To remove the filter, click the filter icon in the top column.

8   Select or deselect the dimensions that you want to activate or deactivate for the listed drivers.

Adding units of measure

The Unit of Measure Conversion page shows a table that contains units of measure organized in unit families.

1   Click the **Home** icon.

2   Click **d/EPM Applications**.

3   Click **Workforce Planning**.

4   Click **Unit of Measure Conversion**.

5   Click **ADD UNIT OF MEASURE**.

6   Specify this information:

Family
Specify the unit family that the unit of measure belongs to.

New Unit Name
Specify the name of the unit of measure.

Conversion Rate
Specify the conversion rate of the new unit of measure in relation to the base unit of measure.

Adding a family

You can use the Unit of Measure Conversion page to add a family of units of measure. Unit of measure families are logical groups of units of measure that contain units of the same category.

1   Click the **Home** icon.

2   Click **d/EPM Applications**.

3 Click **Workforce Planning**.

4 Click **Unit of Measure Conversion**.

5 Click **ADD FAMILY**.

6 Specify the new family name.

7 Specify the new base unit name.

8 Click **SAVE**.

Driver values

3

You can use the Driver Value Report page in the Data Entry section to modify or import driver values.

To manually modify driver values for a selected cycle and version, you must specify the hierarchy dimension and select elements from the activated dimensions.

To upload values for multiple drivers simultaneously, import a `.csv` file with the corresponding driver data. The `.csv` file must contain the driver name and the driver category information. You can import driver values to multiple versions of a selected planning cycle.

Importing driver values

The driver names and categories to be imported must exist in Infor Workforce Planning. Otherwise, you must create the missing drivers or categories before you import the driver values.

1 Click the **Home** icon.
2 Click **d/EPM Applications**.
3 Click **Workforce Planning**.
4 Click **Driver Value Report**.
5 Click **IMPORT DATA**.
6 Specify the file to be imported.
7 Define the order in which the dimensions are displayed in the `.csv` file.

   First, select the dimension that is represented by the first column, then select the dimension that is represented by the second column. Continue until you select all dimensions that are represented by the corresponding columns in the file that you want to import.
   The order of the selected dimensions is indicated next to the check box.

8 To view the content of the file and ensure that the dimensions are assigned in the correct order, click **PREVIEW**.
9 Select the cycle.
10 Select one or more versions.
11 Specify the current period.
12 Click **IMPORT**.

Modifying driver values

To modify driver values manually, you must select a driver, cycle, version, and the multidimensional context for your data entry.

1 Click the **Home** icon.

2 Click **d/EPM Applications**.

3 Click **Workforce Planning**.

4 Click **Driver Value Report**.

5 Select the cycle and version.

6 Select the driver and click **SAVE**.

7 Optionally, select to display previous values.

    a   Select the cycle and version.

    b   Specify the number of periods that you want to display.

8 Select the dimension to be the default hierarchy.

9 Select the filters for all other driver dimensions that are activated for the selected driver.

10 Optionally, change the selected period and the maximum data range.

11 Click **LOAD**.

12 Specify the driver values for the individual cells.

Assignment report

4

With the Assignment report, you can define how you want to calculate labor planning.

You can configure the full-time equivalent (FTE) calculation on each level of the activated dimension. To configure the selected dimension level, provide these details:

*   Maximum, minimum, and fixed FTE

    If, for example, legal requirements must be met and the minimum number of employees is required, you can define the minimum FTE.

*   Drivers to be used in FTE calculation and their corresponding weights and factor values

    You can also import driver values directly in the Assignment report.

After you configure and update the selected dimension level, the configuration icon is displayed to indicate that a configuration was performed. The results of the FTE calculation are displayed when you update the configuration.

Driver based FTE

The driver based FTE value is based on the drivers that were configured for the calculation.

The FTE can be calculated using this formula:

```
Driver based FTE = (Driver value x Driver weight )/(Factor value x
Factor weight)
```

For example, you can use the number of customers as the driver. A factor value of 100 corresponds to the ratio of one full-time employee to 100 customers.

The driver weight value represents the share of each driver on the total workload. The sum of all driver weights equals 100%. If only one driver is used, the driver weight is 100%.

The factor weight accounts for any efficiency issues. If there are no efficiency issues, the factor weight is 100%.

For a factor value of 100, one worker can handle 100 customers. There are no other drivers, so the driver weight is 100%. The factor weight is also 100%. The calculation of the number of workers, or FTE, to handle 500 customers is:

```
FTE = (500 x 100%)/(100 x 100%) = 5
```

See "Calculating the FTE" on page 20.

Total FTE

The **total FTE** value combines the **driver based FTE** result and includes the additional FTE configuration that was defined for the selected level.

If you specify the **Fixed FTE** value, the **Total FTE** equals:

```
Total FTE = Fixed FTE + Driver based FTE
```

Additionally, the **Total FTE** value must be greater than the **Minimum FTE** value and smaller than the **Maximum FTE** value.

Calculating the FTE

1 Click the **Home** icon.
2 Click **d/EPM Applications**.
3 Click **Workforce Planning**.
4 Click **Assignment Report**.
   The table shows the maximum, minimum, and fixed FTE values. It also shows the HR source data, driver-based FTE, and total FTE.
5 Optionally, change the context variables:
   a Click **CHANGE CONTEXT**.
   b Select the cycle, version, and the calculation method.
   c Click **SAVE**.
6 Select the elements from dimensions that were activated for the selected calculation method.
   The FTE values from the HR source data are displayed next to the elements of each dimension. The **T** column shows aggregated values. That is, the total value for all aggregated elements. The **D** column shows values that are assigned directly to the selected element.
7 Optionally, select the assignment filter options.

   Employees on leave excluded
   By default, employees on leave are included in the labor planning. You can select this option to exclude all employees who are on leave.

Vacant positions included
By default, vacant positions are excluded from the labor planning. You can select this option to include all vacant positions.

8 Click **ADD DRIVER** to add one or more drivers to your labor planning.

a Select one or more drivers that you want to add and click **NEXT**.

You can also create a new driver if the driver that you want to use for your calculation is not available.

See "Creating a driver" on page 14.

b Select the type of value that you want to use for calculations.

Detail
Represents the value for the selected element without any aggregation. Use this option to set up a standard or a benchmark configuration to use across an organization without having to repeat the configuration settings. For example, you can configure the top element of your data structure and run calculations on multiple levels, for which the driver values are available.

Parent
Represents the aggregated value of the first consolidated parent element. If the parent value is unavailable, the next consolidated element above that contains any driver value is used.

Total
Represents the total aggregated value for the dimension.

Detail Element
Represents the value that is assigned directly to the selected element without any aggregation. For example, if you are configuring a base element, the value is taken from the base element. If you are configuring a consolidated element, the value that is assigned directly to that element is used.

Aggregated Parent Data
Represents the aggregated value of the consolidated parent element. If you use this option, the value must be on the parent level.

c Assign the factor value for each driver that was added.

The factor value is assigned to the current and future periods.

The factor value is the value of a driver that corresponds to one FTE.

See "Indirect labor planning" on page 7.

d Assign the driver weight for each driver that was added to your FTE calculation.

The driver weight is assigned to the current and future periods. The sum of driver weights for all drivers must be 100%.

e Optionally, you can change the value of the driver weight or the factor value.

If you change the value, you can select to apply the new value to the cell or to the row.

Apply to Cell
Changes the corresponding value for the selected driver for the current or future period.

Apply to Row
Changes the corresponding value for the selected driver for the selected period and all following periods of the selected cycle and version.

f Click **SAVE**.

9 Optionally, click **CONFIGURATION DETAILS** to change the driver configuration and click **APPLY**.

10 Select the period and the data range that you want to display.

By default, the current period is selected.

11 Click **UPDATE**.

After updating the data, you will see the results of the FTE calculations for the selected context.

Transferring Workforce Planning data

5

Use the Data Transfer page to transfer driver values and assignment configuration between different cycles or between different versions of the same cycle. You can also copy driver values and assignment configuration.

1 Click the **Home** icon.

2 Click **d/EPM Applications**.

3 Click **Workforce Planning**.

4 Click **Data Transfer** and click the **Workforce Planning** tab.

5 Specify the source and target criteria and select transfer options. You must select at least one transfer option or no data is transferred.

When you copy data between different versions of the same cycle, you can select specific periods for the source and target data.

6 Click **Initiate**.

Reporting

<div style="text-align:right;">6</div>

These reports are included in Workforce Planning:

Labor Comparison chart

This chart shows the values for the selected driver, the actual FTE, calculated FTE values, and the difference between the calculated and actual FTE values. You can change the context and load the chart to view different periods or dimensions.

Version Comparison report

This report compares labor planning results between different versions of a planning cycle. You can use this report to compare the actual FTE values and up to two versions. The report shows values for the selected versions and the calculated difference between these versions for selected periods. For example, you can select actual source data and compare it with both bottom-up planning and benchmark planning values.

Viewing the labor comparison chart

You can view a chart with the detailed results of your labor planning.

1 Click the **Home** icon.
2 Click **d/EPM Applications**.
3 Click **Workforce Planning**.
4 Click **Labor Comparison Chart**.
5 Select the cycle, version, and the calculation method that you want to display.
6 Select the level of detail and click **SAVE**.

   Total summary
   Shows the total value for the selected level.

   Total summary by children
   Shows the total values for child elements of the selected level. With this option, you can view how the value is distributed across the children.

7   Select the driver.

8   Optionally, select the filters.

   You can select the **View underscore data** option to view workforce that is assigned directly to the
   selected level.

9   Select the period and the range of periods to display.

10 Click **LOAD**.

   The chart with actual, calculated, and delta values is displayed.

11 Optionally, select to represent data by a different dimension or show a different level.

Comparing results between versions

1   Click the **Home** icon.

2   Click **d/EPM Applications**.

3   Click **Workforce Planning**.

4   Click **Version Comparison Report**.

5   Select the cycle and version.

6   Select the elements of the dimensions to specify the granularity of your data.

7   Select the versions that you want to compare.

8   Select the period that you want to compare and the range of periods to display.

9   Click **LOAD**.