# WORKFORCE RESOURCE MANAGEMENT



PERFORMANCE BLUEPRINT APPLICATION BRIEF A WEB-BASED PERFORMANCE MANAGEMENT Application



#### INTRODUCTION

This application brief demonstrates a Web-based planning process for managing workforce resources to driver-based activity requirements using Cognos Planning. By implementing the *Workforce Resource Management Performance Planning Blueprint*, you can manage the process of aligning one of your most important and expensive assets—your employees—to the activities required to effectively and efficiently run the business. The *Blueprint* and processes described in this application brief are generic and can be configured to support the specific requirements of any company that wishes to improve workforce utilization.



#### **MODEL OVERVIEW**

Although employee-related costs are often the largest expense line on a profit-and-loss statement, companies recognize that employees are among their most important assets. Companies should strive to minimize employee costs, yet maximize the benefits gained from employee investments.

Staffing managers are primarily responsible for assigning and scheduling employee activities. Having either too little or too much staff cover can effect both financial and non-financial business performance.

The Cognos Workforce Resource Management Blueprint frees managers from making ad hoc, best guess decisions and helps ensure that they can make the most efficient, most effective use of staff resources. The *Blueprint* takes a best-practice, driver-based approach that helps provide a clear picture of staffing needs.

#### **BLUEPRINT OBJECTIVES**

The Workforce Resource Management Performance Planning Blueprint

- Determines headcount requirements by activity, based on highly flexible, best-practice, driver-based methods.
- Enables managers to set staffing effectiveness by activity for each employee.
- Offers managers real-time visibility into the cumulative schedule's variance from ideal driver-based requirements by activity when entering employee shift patterns.
- Gives clear warning should managers attempt to assign an inappropriate activity.
- Streamlines entry of employee shift details to reduce schedule creation time.
- Includes a clear shift-summary output of the staffing schedule.
- Can vary employee pay rates as required.
- Can set additional pay multiples (such as for national holidays) by employee by day.
- Automatically generates detailed financial implications of the schedule.

#### **KEY COGNOS PLANNING BENEFITS**

- Flexible *Blueprint* development using Cognos Analyst to support any *Workforce Resource Management Blueprint*.
- Web-based deployment of models for data collection and consolidation.
- Real-time workflow.
- Real-time consolidation.
- Real-time browser-based calculation for immediate results.
- Scalable architecture with proven deployments to thousands of line mangers.
- Linking functionality to provide collaboration between all areas of the corporation.
- Capability for form-based planning using selection boxes to drive application logic and calculations.

#### **STAFF DETAILS**

The *Staff Details* tab contains employee information used in the *Blueprint*. Typically, some of this information—such as staff names, job titles, and salary details—is automatically populated from an HR system. Other data—such as "Effectiveness"—may be entered manually by the staffing manager.

Note how hourly rates and effectiveness can vary according to Activity. The generic *Blueprint* is set up for 3 different Activities (Activity 1; Activity 2; Activity 3), but allows for easy modification of Activity descriptions and additional Activities as required.

"Effectiveness" is a measure of the employee's ability to perform a particular Activity. It is measured in FTE (Full Time Equivalents). An Effectiveness value of 1.5 would mean that an employee is capable of performing 50 percent more of a particular activity within the same timeframe than an average employee.

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		Name	Job title	Paid?	Weekly Rate	Contracted Hours	Overtime Rate	Hourly Rate	Effectiveness	Hourly Rate	Effectiveness	Hourly Rate	ffectivene:
Employee	01	Debbie	Unit Manager	Weekly	380.00	47.00	1.00		1.30		1.30		
Employee	02	Pete	Shift Manager	Weekly	320.00	47.00	1.00		1.30		1.30		
Employee	03	Tom	Shift Manager	Weekly	320.00	45.00	1.00		1.30		1.30		
Employee	04	Matt	Associate	Hourly		38.00	1.20	6.00	1.50	6.00	1.00	7.00	
Employee	05	Daniel	Associate	Hourly		12.00	1.20	6.00	1.50	6.00	1.00	7.00	
Employee	06	Emma	Associate	Hourly		12.00	1.20	6.00	1.00	6.00	1.00		
Employee	07	Dan	Associate	Hourly		6.00	1.20	6.00	1.00	6.00	1.00		
Employee	08	Lewis	Associate	Hourly		6.00	1.20	6.00	1.00	6.00	1.00		
Employee	09	Samantha	Associate	Hourly		12.00	1.20	6.00	1.00	6.00	1.00		
Employee	10	Adam	Associate	Hourly		20.00	1.20					8.00	
Employee	11	Rinaldo	Associate	Hourly		38.00	1.20					6.50	
Employee	12	Roger	Associate	Hourly		18.00	1.20					6.50	
Employee	13	Paulo	Associate	Hourly		38.00	1.20					6.50	
Employee	14	James	Associate	Hourly		38.00	1.20					6.50	
Employee	15												
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# PAY MULTIPLE

Typically, the *Pay Multiple* tab is automatically populated with data from a payroll system. The tab is a record of the multiplier of an employee's standard pay rate for a given day.

In the example shown, Emma and Dan are paid 20 percent above their usual rate for every hour they work on a Sunday. Note that, although pay multiples vary, it would be a simple matter to customize the *Blueprint* to allow pay multiple variation by hour if required.

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	Name	Mon	Tue	Wed	Thu	Fri	Sat	Sun					^
Employee 01	Debbie	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1				
Employee 02	Pete	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 03	Tom	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 04	Matt	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 05	Daniel	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 06	Emma	1.00	1.00	1.00	1.00	1.00	1.00	1.20					
Employee 07	Dan	1.00	1.00	1.00	1.00	1.00	1.00	1.20					
Employee 08	Lewis	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 09	Samantha	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 10	Adam	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 11	Rinaldo	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 12	Roger	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 13	Paulo	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 14	James	1.00	1.00	1.00	1.00	1.00	1.00	1.00					
Employee 15													
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Current owner: Administrator

# **DRIVER VOLUMES**

Data in the *Driver Volumes* tab would likely be automatically supplied by another system. This tab holds the volumes for all drivers used to determine activity headcount requirements. In the generic *Blueprint*, there is space for five different drivers (the first three having been given actual names), but space can easily be expanded if required.

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Driver 5									
Sam									
Sam 10									
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12mm	73	123	95	104	111	115			
1nm	117	117	122	123	109	67			
2pm	69	113	133	77	126	120			
3pm	89	85	100	71	70	128			
4pm	133	124	76	93	75	100	105		
5pm	90	104	133	81	109	95	109		
6pm	90	81	77	129	93	109	117		
7pm	117	81	127	84	99	105	109		
8pm	126	73	81	114	85	83	82		
9pm	89	72	117	112	70	111	118		
10pm	123	93	72	77	71	127	101		
11pm	111	71	89	126	96	122			
12am					96	122			
1am									
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Full Day	1,349	1,266	1,332	1,317	1,277	1,501	739		
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In the example above, we have selected Sales Value from the drop-down list.

#### **ACTIVITY DRIVERS**

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Activity 1	Driver 4	1.0 FTE	1.0 FTE	1.0	1.0						
Activity 2	Sales Value	0.0 FTE	1.0 FTE	35.0	50.0						
Activity 3	Sales Transaction	ns 0.0 FTE	1.0 FTE	30.0	0.0						
	Delivery Value										
	Driver 5										
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In the *Activity Drivers* tab, we are able to set which items drive the various activities, and at what rate. There is substantial activity available in setting driver rates. Examples shown include:

- Activity 1 is driven by Driver 4; where
  - o Activity 1 has a minimum requirement of 1 FTE when Driver 4 exists; plus
  - o Once the value of Driver 4 rises above 1; an additional
  - o 1 FTE for every additional increment of 1 in Driver 4's value
- Activity 2 is driven by Sales Value (hidden by the drop-down); but
  - o There is no requirement for any FTE for Sales Values up to 35; then
  - o For every additional 50 units of Sales Value; we require
  - o 1 FTE
- Activity 3 is driven by Driver 5 (hidden by the drop-down)
  - o We require 1 FTE for every 30 units of Driver 5's value

#### **ACTIVITY VALUES**

The next tab, *Activity Values*, is a calculation-only tab that requires no direct end-user input; no data need be loaded into it. It is used for modeling purposes only, and could be either hidden from end-users or displayed for explanatory purposes.

In the standard Blueprint tab layout, data is laid out as shown:

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0.70	1.30	2.00	1	1	1.00 FTE	1.00 FTE	2	iver 4	Di	m
(0.30)	1.30	1.00	1	1	1.00 FTE	1.00 FTE	1	iver 4	Di	m
(0.30)	1.30	1.00	1	1	1.00 FTE	1.00 FTE	1	iver 4	Di	Dpm
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0.00	0.00	0.00	1	1	1.00 FTE	1.00 FTE		iver 4	Di	am
(6.30)	27.30	21.00	24	24	24.00 FTE	1.00 FTE	21		ay	ull C

With this orientation, we can see the calculation of Ideal FTE headcount requirement for an individual Activity ("Ideal Activity") for one day by hour. We also have a view of the "Planned Activity" (see next tab), and the variance between the Ideal and Planned Activities.

End-users may also find the following orientations useful.

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Pay Mu	Itiple Driv	er Volumes	Activit	y Drivers	Activity V	alues Sc	hedule	Shift Summary Activity Summary Payroll Planned Week Hour/Timeslot Ratio	
Transferre	y 1		- *	Ideal Ac	tivity		-	🎓 🛛 Planned Week 💽 🎓 🗍 🦫 London Oxford Street 1 💌	
	Mon	Tue	Wed	Thu	Fri	Sat	Sun		
10am	1.00	1.00	1.00	1.00	1.00	1.00	0.00		
11 am	2.00	2.00	2.00	2.00	2.00	2.00	0.00		
12pm	2.00	2.00	2.00	2.00	2.00	2.00	0.00		
1pm	2.00	2.00	2.00	2.00	2.00	2.00	0.00		
2pm	2.00	2.00	2.00	2.00	2.00	2.00	0.00		
3pm	1.00	1.00	1.00	1.00	1.00	1.00	0.00		
4pm	1.00	1.00	1.00	1.00	1.00	1.00	1.00		
5pm	1.00	1.00	1.00	1.00	1.00	1.00	1.00		
6pm	2.00	2.00	2.00	2.00	2.00	2.00	1.00		
7pm	2.00	2.00	2.00	2.00	2.00	2.00	1.00		
8pm	2.00	2.00	2.00	2.00	2.00	2.00	1.00		
9pm	1.00	1.00	1.00	2.00	2.00	2.00	1.00		
TUpm	1.00	1.00	1.00	2.00	2.00	2.00	1.00		
11pm	1.00	1.00	1.00	2.00	2.00	2.00	0.00		
12am	0.00	0.00	0.00	0.00	2.00	2.00	0.00		
Tam	0.00	0.00	0.00	0.00	0.00	1.00	0.00		
Full Day	21.00	21.00	21.00	24.00	26.00	27.00	7.00		
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In this orientation, we can see the Ideal Activity levels for Activity 1 for the entire week.

# Alternatively:

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	Activity 1	Activity 2	Activity 3		
10am	1.00	0.00	0.00		
11am	2.00	1.33	1.00		
12pm	2.00	1.85	1.00		
1pm	2.00	0.50	1.00		
2pm	2.00	2.00	2.00		
3pm	1.00	2.23	1.00		
4pm	1.00	1.43	1.00		
5pm	1.00	1.30	1.00		
6pm	2.00	1.70	2.00		
7pm	2.00	1.56	2.00		
8pm	2.00	0.93	2.00		
9pm	2.00	1.75	2.00		
10pm	2.00	2.21	2.00		
11pm	2.00	2.06	2.00		
12am	2.00	2.06	0.00		
1am	1.00	0.00	0.00		
Full Day	27.00	22.90	20.00		
				Current owner: A	dministrator

With this orientation, a user can view Ideal Activity levels for every Activity for an individual day.

In summary, although there is no requirement to make this tab visible to the end user, it does contain data of interest, and is a useful demonstration of the power of Cognos Planning "slice-and-dice" functionality.

#### SCHEDULE

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	Activity 1	Activity 2	Activity 3	Employee 01	Employee 02	Employee 03	Employee 04	Employee 05	Employee 06	Employee 07	Employee 08	Employee 09	mployee
	V	ariance Activi	ly .					Start Actin	zity				
Name				Debbie	Pete	Tom	Matt	Daniel	Emma	Dan	Lewis	Samantha	1
4am	0.00	0.00	0.00										
5am	0.00	0.00	0.00										
6am	0.00	0.00	0.00										
7am	0.00	0.00	0.00										
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9am	0.00	0.00	0.00										
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12pm	(0.60)	0.65	(1.00)			Activity 1	]						
1pm	(0.60)	1.90	(1.00)			Activity 2							
2pm	(0.60)	0.55	0.00			Activity 3							
3pm	(0.30)	1.10	1.00		End Activity	End Activity	]						
4pm	(0.30)	2.36	1.00										
5pm	(1.60)	1.14	0.00		Activity 1								
6pm	(0.60)	0.14	0.00						Activity 2				
7pm	0.70	0.92	0.00	End Activity									
8pm	0.70	1.17	0.00										
9pm	(0.30)	0.12	0.00										
10pm	(0.30)	1.10	0.00										
11pm	(0.30)	0.75	0.00										
12am	0.00	0.00	0.00		End Activity				End Activity				
1am	0.00	0.00	0.00										
2am	0.00	0.00	0.00										
3am	0.00	0.00	0.00										
Full Day	(6.30)	13.96	0.00										
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*Schedule* is the key tab in the model, and may be the only tab into which end-users directly enter data. In the screen above, the day being planned is Monday (as seen in the top left drop-down box), with hours of the day displayed as rows. Note that although the standard Blueprint has hourly "timeslots" for the schedule, it can easily be adapted—for example, to allow for half-hourly timeslots..

The columns are split into two sections:

The first three automatically display the total variance for each Activity between the ideal level (as determined on a best-practice driver basis) and the planned activity that the staffing manager enters in the schedule.

The remaining columns are used to enter individual employee shifts.

In order to make entering shifts as quick and efficient as possible, the staffing manager only needs to enter information *where it changes*. For example, Debbie (Employee 1) has a shift starting at 10 a.m. and finishing at 7 p.m. with a single activity (Activity 1) throughout. Because every possible entry is available from a drop-down list (as shown in Tom's column), entering a shift requires only two inputs.

Note that Pete has a "split shift" on Monday: He starts work at 10 a.m. on Activity 1, breaks at 3 p.m., and then returns at 5 p.m. where he continues on Activity 1 until he finally finishes for the day at 12 a.m. The *Blueprint* allows for up to six different shifts in a single day, although shifts can easily be added.

As the start and end of each shift are entered, the Variance Activities on the left hand side of the screen are automatically recalculated, so that the staffing manager has continual visibility into what activities still require headcount.

Recall how we were able to set an employee's "Effectiveness" at each Activity in the *Staff Details* tab. Effectiveness is the value by which the activity variance will change as we enter shifts. However, it is possible that an employee will have an effectiveness value of zero for an activity. This does not mean that an employee cannot be *assigned* to that activity, but only means that he or she cannot *perform* that activity effectively.

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30 IN	lon			-	🔭 🕅 Plar	ned Week	-	* Und	on Oxford Street 1					
		Activity	1 A	Activity 2	Activity 3	Employee 01	Employee 02		Employee 03		Employee 04	Employee 05	Employee 06	nployee
			Varia	ance Activit	y		Start Activity		Warning			Start Activ	ity	
Name						Debbie	Pete	Tom			Matt	Daniel	Emma	
4am		0.	00	0.00	0.00									
5am		0.	00	0.00	0.00									
6am		0.	00	0.00	0.00									
7am		0.	00	0.00	0.00									
8am		0.	00	0.00	0.00									
9am		0.	00	0.00	0.00									
10am		(1.6	30)	0.00	0.00	Activity 1	Activity 1	Activity 3 🔹	Individual cannot perform sele	cted activit	y .			
11 am		(0.6	60)	2.04	0.00									
12pm		(0.6	60)	0.65	(1.00)									
1pm		(0.6	50)	1.90	(1.00)									
2pm		(0.6	60)	0.55	0.00									
3pm		(0.3	30)	1.10	1.00		End Activity							
4pm		(0.3	30)	2.36	1.00									
5pm		(1.6	60)	1.14	0.00		Activity 1							
6pm		(0.6	60)	0.14	0.00								Activity 2	
7pm		0.	70	0.92	0.00	End Activity								
8pm		0.	70	1.17	0.00									
9pm		(0.3	30)	0.12	0.00									
10pm		(0.3	10)	1.10	0.00									
11pm		(0.3	80)	0.75	0.00									
12am		0.	00	0.00	0.00		End Activity						End Activity	
1am		0.	00	0.00	0.00		_							
2am		0.	00	0.00	0.00									
3am		0.	00	0.00	0.00									
Full D	ay	(6.3	0)	13.96	0.00									
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In the example above, a manager has assigned a task to an individual with a zero effectiveness rating for that activity and a warning has been displayed.

As with the Activity Values tab, we can take advantage of Cognos Planning "slice-and-dice" functionality.

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Staff Del	etails Pay M	ultiple [	Driver Volumes	Activity Drive	rs Activity	alues Schedu	e Shift Sum	mary Activity Summary	Payroll Planned Week	
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5am										
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Current owner: Administrator

A useful example of slicing and dicing the *Schedule* tab is shown above. Rather than showing the schedules for all employees on a particular day, we can simply change the tab's orientation to show an individual employee's schedule for the entire week.

#### SHIFT SUMMARY

Although we may design an input mechanism to be as efficient as possible (such as the "two inputs to enter a shift" approach as in the *Schedule* tab), we often require output to be displayed in a completely different way.

The *Shift Summary* tab meets just such a need. Typically, a staffing manager will want to print out and post on the office notice board a single sheet that describes the entire shift pattern for that week (as shown in the screenshot below).

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			Mor	n			Tue			Wed			Thu			Fri		Sat
		Name	Start	End	Activity	Start	End	Activity	Start	End	Activity	Start	End	Activity	Start	End	Activity	Start
	1	Debbie	10am	7pm	Activity 1				10am	7pm	Activity 1	10am	6pm	Activity 1	3pm	1 am	Activity 1	11ar
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	1	Pete	10am	3pm	Activity 1	10am	6pm	Activity 1				12pm	12am	Activity 1	10am	7pm	Activity 1	
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and an a 02	1	Tom				12pm	3pm	Activity 1	10am	3pm	Activity 1	3pm	12am	Activity 1	5pm	1 am	Activity 1	4pm
nployee 03	2					6pm	12am	Activity 1	7pm	12am	Activity 1							
malaura 04	1	Matt				5pm	12am	Activity 2	5pm	12am	Activity 2	11am	3pm	Activity 2	11am	4pm	Activity 2	
impioyee 04	2											6pm	12am	Activity 2				
mployee 05		Daniel													5pm	9pm	Activity 2	5pm
Employee 06		Emma	6pm	12am	Activity 2													11an
mployee 07		Dan													6pm	1am	Activity 2	
mployee 08	1	Lewis													12pm	3pm	Activity 2	
mployee 09		Samantha							6pm	12am	Activity 2							7pm
mployee 10		Adam				12pm	12am	Activity 3				4pm	12am	Activity 3	10am	5pm	Activity 3	
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mployee 12	4	Roger				6pm	12am	Activity 3	10am	4pm	Activity 3				7pm	12am	Activity 3	
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impioyee 15	2		6pm	12am	Activity 3	6pm	12am	Activity 3										
mployee 14	1	James	12pm	8pm	Activity 3										11am	4pm	Activity 3	

The *Blueprint* will automatically calculate shift numbers and display start- and close up, along with the relevant activity, for each shift, employee, and day of the week.

# **ACTIVITY SUMMARY**

🗿 Resource Man	agement	Contribution	is   London	n Oxford Street 1 - Cognos Planning - Contributor	_ 🖻 🔀
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Staff Details P	ay Multiple	Driver Volumes	Activity D	Irivers Activity Values Schedule Shift Summary Activity Summary Payroll Planned Week	
🎀 🛛 Week 01		🔽 🎾 🛡	London Oxford	rd Street 1 💌	
	Activity 1	Activity 2	Activity 3		
Driver	Driver 4	Sales Value	Driver 5		
Driver Volume	147	8,781	4,710		
Target Hours	147	127	157		
Plan Timeslots	185	84	155		
Hour/Timeslot ratio	1	1	1		
Plan Hours	185	84	155		
Plan Rate	1	105	30		
-				Current owner: Administr	ator

This tab is an example of the higher-level functionality the *Blueprint* can provide. Included are simple metrics (such as Driver Volumes, targeted hours, planned hours, and so on) for the full week for each activity. This tab may be extended to display most relevant metrics or KPIs.

# PAYROLL

Resource Management	t   Contributio	ons   London (	Oxford Street	1 - Cognos P	lanning - Con	tributor					BX
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Staff Details Pay Multiple	Driver Volume	es Activity Driv	vers Activity V	alues Schedu I e	Shift Summary	Activity Sum	nary Payroll	Planned Week		k	
Week 01	<b>▼</b> *	London Oxford	Street 1 🗾 💌						_		
	Employee 01	Employee 02	Employee 03	Employee 04	Employee 05	Employee 06	Employee 07	Employee 08	Employee 09	Employee 10	mployee 1
Name	Debbie	Pete	Tom	Matt	Daniel	Emma	Dan	Lewis	Samantha	Adam	Rinaldo
Job title	Unit Manager	Shift Manager	Shift Manager	Associate	Associate	Associate	Associate	Associate	Associate	Associate	Asso
Paid?	Weekly	Weekly	Weekly	Hourly	Hourly	Hourly	Hourly	Hourly	Hourly	Hourly	H
Weekly Rate	380.00	320.00	320.00								
Hourly Pay				216.00	78.00	72.00	42.00	18.00	78.00	216.00	3
Hours Worked	48.00	48.00	46.00	36.00	13.00	12.00	7.00	3.00	13.00	27.00	
Effective Hourly Rate	7.92	6.67	6.96	6.00	6.00	6.00	6.00	6.00	6.00	8.00	
Basic Pay	380.00	320.00	320.00	216.00	78.00	72.00	42.00	18.00	78.00	216.00	31
Extra Pay											
Contracted Hours	47.00	47.00	45.00	38.00	12.00	12.00	6.00	6.00	12.00	20.00	
Overtime Rate	1.00	1.00	1.00	1.20	1.20	1.20	1.20	1.20	1.20	1.20	
Overtime Additional Pay					1.20		1.20		1.20	11.20	1
<											>
									Current ov	vner: Administral	tor

The *Payroll* tab as an example of financial outputs available from the *Blueprint*. Although the prime goal is improving staff scheduling efficiency and effectiveness against driver-based requirements, because such information as employee pay-rates is included, we can leverage user input in ways impossible without the *Blueprint*. Additionally, the data from this tab could be used to automatically populate a short-term forecasting model with expected (and highly accurate) staffing expenses.

#### **PLANNED WEEK**

This tab would usually be hidden. It is used solely for modeling purposes and defines the financial week currently being planned.

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	Current owner: Administrator

# **HOUR/TIMESLOT RATIO**

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Value       Hour/Timeslot ratio	

This tab would usually be hidden. It is used for modeling purposes only and defines the number of timeslots available during a single hour. In the standard *Blueprint*, a timeslot equals one hour and has the value of 1. If, for example, each timeslot in the model were 15 minutes, it would have the value 4.

# ABOUT THE COGNOS INNOVATION CENTER FOR PERFORMANCE MANAGEMENT

The Cognos Innovation Center was established in North America and Europe to advance the understanding of proven planning and performance management techniques, technologies, and practices. The Innovation Center is dedicated to transforming routine performance management practices into "next practices" that help cut costs, streamline processes, boost productivity, enable rapid response to opportunity, and increase management visibility.

Staffed globally by experts in planning, technology, and performance and strategy management, the Innovation Center partners with more than 600 Cognos customers, academicians, industry leaders, and others seeking to accelerate adoption, reduce risk, and maximize the impact of technology-enabled performance management practices.

