



Customer story  
University of Technology  
Eindhoven – TU/e

Partake Consulting

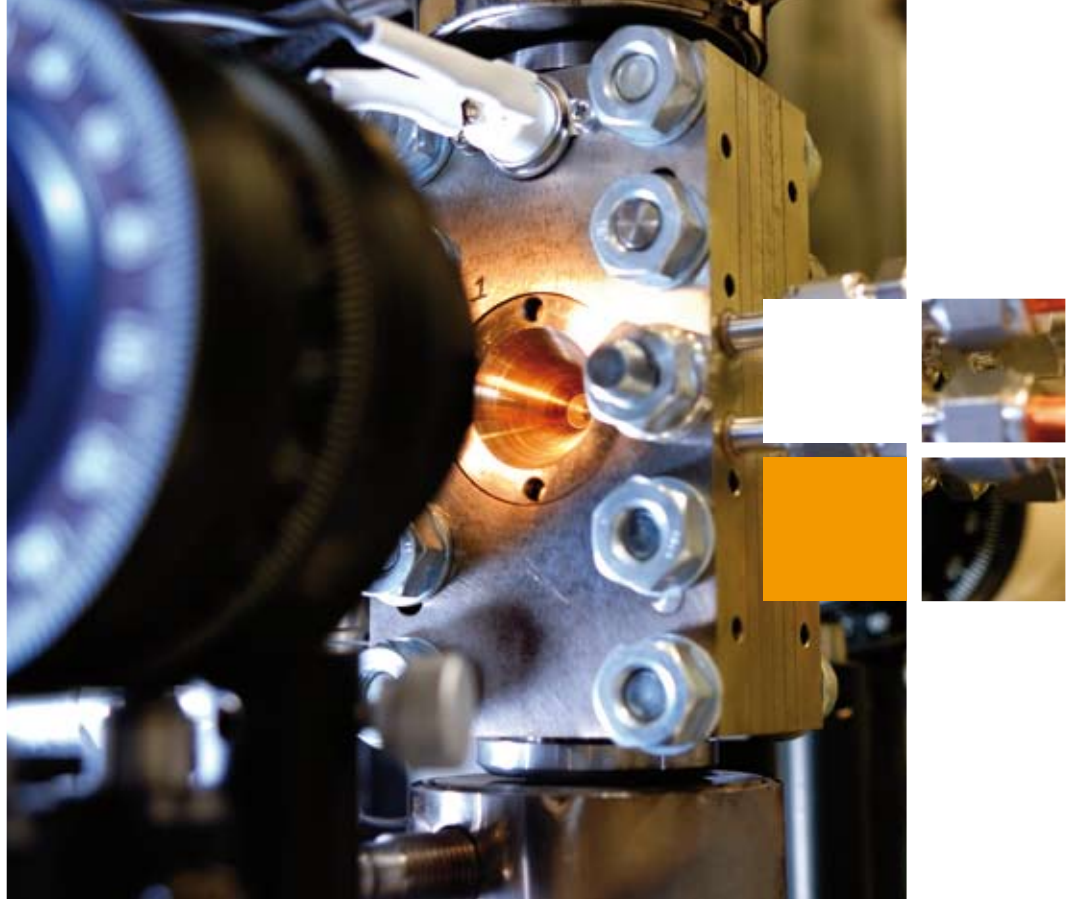


■ **The smart way to business insight.**

**Customer story**  
**University of Technology**  
**Eindhoven – TU/e**

"...I have seldom seen such a professional consulting partner; the contribution during the whole change program was excellent! Partake consultants have the right expertise: relevant background and experience combined with an open mind attitude..."

**Ir. P.J.M. Meijers, Head of functional maintenance and development department.**



### **Business requirement:**

Optimise continuity and reliability in the budgeting and forecasting proces.

### **Solution:**

Oracle | Hyperion Workforce Planning.

### **Introduction**

The University of Technology Eindhoven is a leading research driven university at an international level. The university is active in the fields of teaching, research and knowledge valorization. In a highly complex environment, the Finance and Economics department of the university faced significant challenges with their budgeting and forecasting process. The lengthy process was not only labor-intensive, the accuracy of the outcome was also questioned given the significant number of manual interventions.

### **Planning and budgeting with TU/e's legacy systems**

Comparable with many other corporate and organizational environments TU/e managed their budgeting and forecasting process using Microsoft Excel and Microsoft Access as the supporting software tool. The process was inflexible and it was a huge task for the Finance and Economics department to fill all the relevant excels worksheets per quarter with the realized actuals and a huge task for the controllers to complete the forecast in these excel sheets based on the realized actuals.

Universities can get their funds from three different cash flows.

1. First Cash Flow: Central government (based on number and type of employees and students)
2. Second Cash Flow: Central government for Research projects (innovation)
3. Third Cash Flow: European funds, research funded by the business, special projects.

It is important for each controller of a faculty or a service department and for the Finance and Economics department to be able to show transparency in the coverage of all costs against one or more of these 3 Cash Flows.

The management of the Finance and Economics department showed leadership by triggering a redesign of the forecasting and management information process and the implementation of a state-of-the art budgeting tool.

The main objectives of this significant change program were:

1. Establishing continuity: managing away from a complex and risky process that was principally managed by one person and supported by multiple outdated Excel sheets and Access applications.
2. Reliability of the outcome: Align definitions and providing transparency in the figures.

## The ORCA/bp project to implement a new budgeting process

“Many of the university’s software systems are Oracle based. For that reason, management of the Finance and Economics department assessed that a tool from the Hyperion Enterprise Performance Management suite was the best solution moving forward. As personnel costs represent around 70% to 75% of the total costs it was decided to start implementing Hyperion Workforce Planning software.

In January 2008 the TU/e decided to start the ORCA/bp project. ORCA is the university’s backbone Finance and Economics system and BP stands for “Begroting en Prognose” which translates into budgeting and forecasting.

Given their extensive experience with similar programs TU/e decided to build the application themselves and asked Partake Consulting to fulfill a support role in the design and realization of this important project.

“...Hyperion matched excellently with our requirements and the short implementation cycles that we had seen at one of Partake’s larger customers made us decide to purchase Hyperion Workforce Planning and ask Partake to support us with the implementation...” Ir. P.J.M. Meijers, Head of functional maintenance and development department.

During the start of the project key staff was involved in scoping sessions, led by Partake Consulting professionals. Participants at the scoping sessions varied from executive management, operational management, personnel and finance staff, functional and technical professionals, both centrally as well as de-centrally located. It was extremely important to involve this broader target group during the initial design of the new solution as the budgeting cycle is an important primary management process at the university.

### The solution

The implementation of Hyperion Workforce Planning enabled an efficient planning process across all faculties and service departments of the university. It has simplified the planning of workforce related expenses, such as vacancies / to-be-hired costs, supernumerary places, allowances, gratifications and bonuses allocated to one of the three cash flows and has expanded the planning time horizon four years out.

The ORCA/bp solution enabled the TU/e to get rid of exhausting maintenance of their Excel and Access environment. As the university clearly recognized the limits of that environment they now have a new platform for future growth allowing staff to spend more time on analyses of their actuals against budgets and overviews of personnel related to the cash flows rather than (technical) reconciliations. The former way of working and the then available toolsets could never have supported that.

“...with this solution we’re moving from reconciling financial information to strategic management ...” Ir. P.J.M. Meijers, Head of functional maintenance and development department.

Hyperion Workforce Planning integrates with the overall Oracle suite of applications. As a result of this, management of the university is now able to deliver tailor made analyses, including more flexible reporting periods. It is now possible to submit a budget with monthly details. This used to hold a quarterly detail. It is also possible to execute each quarter a year end forecasting process (based on quarters) using the actual month end data and offer comparison to the budget and actual data.

Hyperion Planning also allowed the Finance and Economics department to spread the First Cash Flow funds between the faculties and services departments. The controllers of the faculties and service departments could then spread these funds to their cost centers.

The tool is also configured to align with international university benchmark parameters. As it is important for the university’s incoming cash flows to provide transparency around key performance indicators this is a major step forward. All this information is now managed through one central system.

### Benefits of the solution

Just shortly after the implementation of the new process and the finalized toolset the university already sees the initial objectives have been met.

1. Continuity of the total setup:
  - a. One central application is available to all controllers and maintained by the Functional Maintenance and Development department,
  - b. Security makes sure the controllers only see the data they need to see.
  - c. Each month the application is updated with new



### About Technical University Eindhoven

Eindhoven University of Technology (TU/e) plays a prominent role at both national and international levels through its research and educational programs in the engineering science and technology domain.

TU/e has a strong commitment to the valorization of knowledge: translating research results into successful innovations. This may for example take the form of contributions to the development of new products or processes for industry, and the setting up of new enterprises.

The university is located in Eindhoven, in South-East Brabant, a region with a strong engineering, technology and innovation profile. At this focal point of engineering and technology TU/e is a source of innovation, which is why the university proudly states “TU/e: Where innovation starts”.

accounts, cost centers and employees and related employee data.

2. Reliability of the system:
  - a. Generic salary related percentages and values have been stored in the application making the results of the calculations comparable between different faculties.
  - b. Every controller uses the same reporting set in the budget meetings.
  - c. After the quarterly hardclose the actual data is (by month) uploaded into Hyperion Planning making it available for the standardized variance reporting and for forecasting.
  - d. Since the application is 24/7 available the controllers can generate the standardized reports whenever they need them and work on their forecast whenever they have the input available.

“..We have come from reasonably reliable without any further developments to fully reliable figures on a platform for further growth!..” Ir. P.J.M. Meijers, Head of functional maintenance and development department.

Next to the original objectives a number of side effects have also materialized:

1. Version management:
  - a. In the requirements analysis it was decided to keep different versions of the budget available in the application. This gives a transparent audit trail of the budget for the faculty.
  - b. Different versions of the employee model could be used to calculate the Profit & Loss and Balance Sheet information.
2. Efficiency improvements:
  - a. The Functional Maintenance and Development department uploads each month the latest HR employee list into the application using Hyperion Application Link. Minutes later the employee information is available for the controllers.
  - b. Actuals are uploaded after each hardclose and directly available for the controllers.

“...I have seldom seen such a professional consulting partner; the contribution during the whole change program was excellent! Partake consultants have the right expertise: relevant background and experience combined with an open mind attitude...” Ir. P.J.M. Meijers, Head of functional maintenance and development department.

The management of TU/e indicates that with the help of Partake Consulting the university now has a solid budgeting and forecasting solution. The cooperation between TU/e and Partake Consulting has proven to be a very successful one where Partake Consulting has supported TU/e with project management, process redesign, system development and general knowledge & experience sharing on Hyperion.

“...We haven't come across a problem that Partake Consulting was not able to solve swiftly!...” Ir. P.J.M. Meijers, Head of functional maintenance and development department.

## About Hyperion Workforce Planning

Oracle Hyperion Workforce Planning software is a special-purpose planning module that makes headcount, salary, and compensation planning fast and efficient across the enterprise. Designed with pre-built functionality and best practices that are ready to use right out of the box, it simplifies the planning of workforce and workforce related expenses, such as bonuses, fringe benefits, overtime and merit increases. It also automatically and seamlessly links your workforce expense plans into Oracle Hyperion Workforce Planning, to deliver accurate and real-time awareness of the business impact of your workforce decisions on your overall expense plans.

## Benefits

- **Deploy Quickly** — Simplify implementation and reduce maintenance requirements with prebuilt functionality
- **Improve Confidence** — Address all workforce planning requirements with a fully flexible and open architecture
- **Enhance Accuracy** — Achieve greater accuracy, predictability, and accountability through detailed headcount, salary and benefit planning
- **Optimize Resources** — Assess real-time impact of salaries and associated workforce expenses
- **Save Time and Money** — Reduce workforce planning cycle time by eliminating dependency on spreadsheets



Ir. P.J.M. Meijers, Head of functional maintenance and development department





## Partake's role in the quest for business insight

Over 200 large companies rely on Partake to guide them in the implementation of reporting systems that offer support in their quest for business insight. Operating in the domain of financial reporting and performance analysis, Partake can help you turn your strategy into systems and information flows, as well as modeling systems that allow you to meet your legal reporting requirements.



## Our complete offer:

The testimony to our success lies in the long-term partnerships we forge with our clients. The completeness of our offer ensures we can sustain such partnerships and means that Partake can take away your reporting system concerns, leaving you to concentrate on the business of running your business.

- Consulting - guaranteed quality in your implementation projects
- Support - peace of mind in the ongoing operation of your reporting applications
- Infrastructure - performance, reliability and stability for your chosen applications
- Training - empowering your staff to leverage the collected and collated information
- Software - more complete or tailored solutions

## Our mission

We make it our mission to make sure you do not waste time and money on high volumes of inexperienced consultants. Instead we work with small teams of experienced consultants with complementary business, technology and infrastructure skills, so that you benefit from better solutions delivered faster. Partake has premium partnerships with leading software suppliers in the Corporate Performance Management market.

Partake Consulting

**The smart way to business insight.**

**We look forward to partake in your quest for business insight.**

**Partake Consulting Nederland**

Maliebaan 68  
P.O. Box 13169  
NL-3507 LD Utrecht  
The Netherlands  
Telephone +31 (0)30 691 39 47  
Fax +31 (0)30 691 39 45

**Partake Consulting France**

55 Rue Raspail  
92300 Levallois Perret  
France  
Telephone +33 (0)1 55 46 97 50  
Fax +33 (0)1 47 30 38 95

**Partake Consulting Belgium**

Culliganlaan 2C/3  
1831 Diegem  
Belgium  
Telephone +32 (0)2 721 82 75  
Fax +32 (0)2 725 18 05

**Partake Consulting Germany**

Am Meerkamp 19 A  
D-40667 Meerbusch  
Germany  
Telephone +49 (0)2132 13975-0  
Fax +49 (0)2132 13975-555

**[www.partake.com](http://www.partake.com)**

© 2009 Partake Consulting Europe B.V. All trademarks and registered trademarks are the property of their respective owners.

Fotografie: Bart van Overbeeke Fotografie, website: [www.bvof.nl](http://www.bvof.nl) en Rob Stork uit Eindhoven.

**Partake Consulting**

