THOMSON

HR Measurement Toolkit

User Guide

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Overview of HR Measurement Toolkit

Welcome

The *HR Measurement Toolkit* has been designed to provide you with a framework for measuring the HR function. The accompanying CD-ROM contains extensive commentary and instruction on the 'what' and 'how' of HR measurement, as well as over a dozen Excel workbooks to perform the calculations for you.

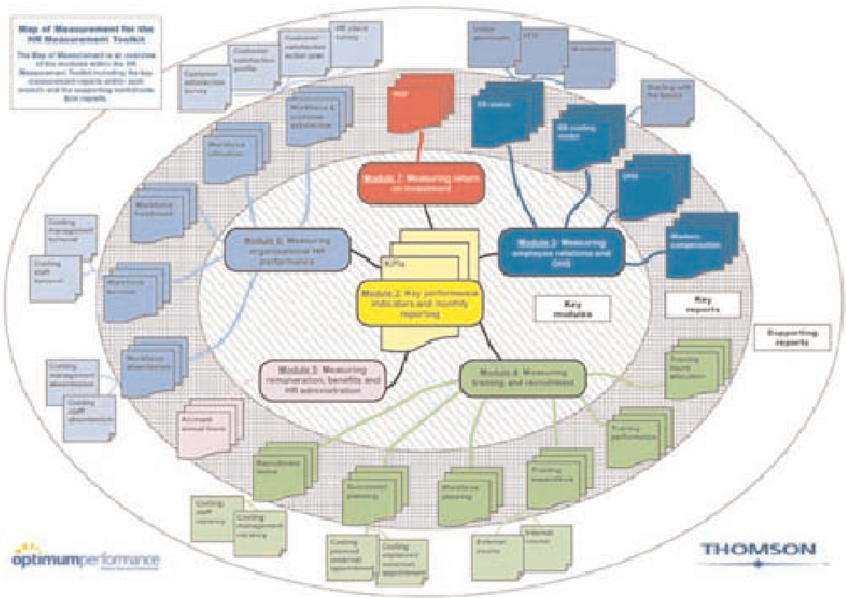
This User Guide contains a description of the modules that make up the *HR Measurement Toolkit*, as well as sets the scene for an integrated HR strategy. The objective of each key measure is highlighted, and instructions for the workbooks have been replicated in this booklet for ease of reference.

Towards the back of the User Guide, you will find the How to Use information including installation instructions.

Description of Contents

HR Measurement Toolkit contains seven modules which provide a framework for HR measurement and reporting.

The physical relationship between the modules and their supporting reports can be seen on the Visual Content Map.



Look for an updated Visual Content Map on the main menu of your *HR Measurement Toolkit.*

Module 1: Introduction

Module 1 sets the scene for HR measurement and reporting with a focus on developing an effective, integrated HR strategy. Useful diagrams contrast ineffective and effective strategy formulation with particular emphasis given to the data gathering and strategy development phases. The text from Module 1 has also been included in this User Guide (refer page 11).

Module 2: KPIs & Monthly Reporting

The first step in creating and sustaining a comprehensive HR measurement and reporting system is to establish an integrated set of KPIs which reflect organisational HR performance. This set of KPIs provides the platform upon which to leverage the HR agenda.

To achieve this objective, you are provided with:

- key principles for introducing KPIs;
- measurement criteria;
- an example format for monthly KPI reporting;
- a guide to internal benchmarking comparisons;
- a guide to preparing an internal service intervention report;
- key principles for introducing HR status reporting; and
- an example format for monthly status reporting.

Module 3: Measuring Employee Relations & OHS

To achieve maximum results and supplement the introduction of HR KPIs and periodic status reporting, it is recommended that HR professionals progressively develop and implement specific, detailed reports covering all key areas of HR management, including employee relations.

This module contains examples of employee relations reports including:

- costing unfair dismissal claims;
- costing equal employment opportunity claims;
- costing workforce grievances;
- periodic employee relations reports;
- occupational health and safety reports;
- workers compensation; and
- workforce productivity and efficiency.

Also included is an Enterprise Bargaining Costing Model which will allow you to model the cost impact of various bargaining positions.

Module 4: Measuring Organisational Development & Recruitment

Module 4 provides a range of tools to evaluate the significant investment made in the areas of organisational development and recruitment. Internal and external training course expenditure, training hour allocation, training course effectiveness and outcomes, planned vs unplanned appointments and recruitment performance are evaluated.

This module contains examples of training and recruitment reports including:

- training expenditure;
- training hours;
- training effectiveness;
- training course outcomes;
- talent management and succession planning;
- workforce capacity;
- workforce profile;
- recruitment and hiring; and
- performance management.

Module 5: Measuring Remuneration, Benefits & HR Administration

This module provides a range of measurement and reporting tools for remuneration, benefits and HR administration. Module 5 emphasises the importance of getting the basics right — ensuring employees are paid accurately and on time, managing accrued annual leave, and making sure your company's remuneration program attracts, retains and motivates competent employees.

This module contains examples of remuneration, benefits and HR administration reports including:

- payroll performance;
- accrued annual leave;
- HR policies and procedures; and
- remuneration programs.

Module 6: Measuring Organisational Workforce Performance

Module 6 examines a range of measurement formats which are designed to report on the overall HR climate of the organisation. Staff turnover, absenteeism, utilisation and headcount can be reported, and the results of exit interviews and attitude surveys can be analysed.

This module contains examples of organisational HR performance tools including:

- periodic staffing levels/headcount/expenditure reports;
- staff turnover costing model;
- periodic turnover reports;
- staff absenteeism costing model;
- periodic absenteeism reports;
- exit interviews format;
- periodic exit interview reports; and
- workforce attitude surveys.

Module 7: Measuring Return on Investment

In this module you are provided with a model for undertaking cost-benefit analysis, combined with a range of practical examples applied to a range of intended HR projects or initiatives. The ROI model can be used to support HR initiatives, as well as determine whether to proceed with an internal customer's request for HR support.

This module contains ROI tools including:

- ROI costing model worksheet; and
- examples of ROI costings and assumptions.

Benchmarking Survey

As a subscriber to the *HR Measurement Toolkit*, you are invited to participate in the annual HR Measurement Benchmarking Survey. The survey has been designed to capture important benchmark information on key measurement criteria so that you can determine how your organisation is performing relative to others.

The survey asks you to complete a series of questions about the measurement results you have calculated using worksheets contained within the *HR Measurement Toolkit*. The results are then pooled, analysed and reported back to you at a nominated time each year. To find out more, click on the Benchmarking Survey button on the main screen.

Templates

Links to sample documents and worksheets (referred to as 'templates') are included throughout the modules, and may be accessed by clicking on the symbol. Alternatively, the templates may be accessed through the Template button in the main menu.

Measures and Objectives

The following table outlines the primary objectives of each of the key measures and/or reports contained within *HR Measurement Toolkit*.

Module	**Measure and/or Report**	**Objective**
Module 2: KPIs & Monthly Reporting	HR Key Performance Indicator Report	To provide senior management with overarching information on HR performance, identifying areas where intervention and improvement is required and those where current performance levels are satisfactory.
	Internal Benchmarking Comparisons	To evaluate the relative size, cost and expenditure of the HR department against other comparable service providers' (departments') performance within the organisation.
	Internal Service Interventions	To demonstrate to the organisation the key areas where HR is making a contribution.
	HR Status Report	To provide senior management with a succinct report which informs them about HR initiatives, interventions, support services, and expenditure.

Module	Measure and/or Report	Objective
Module 3: Measuring Employee Relations & OHS	Costing Unfair Dismissal Claims	To demonstrate the real impact of unfair dismissal claims, thereby gaining commitment from line managers to use the correct procedures on an ongoing basis.
	Costing Equal Employment Opportunity/ Discrimination/ Harassment Claims	To demonstrate the real impact of discrimination or harassment claims, thereby gaining the commitment from line managers to use the correct procedures on an ongoing basis.
	Costing Workforce Grievances	To demonstrate the real impact of workforce grievances, thereby gaining the commitment from line managers to use the correct procedures on an ongoing basis.
	Enterprise Bargaining Costing Model	To demonstrate the real vs negotiated cost of an enterprise bargaining position by modelling the financial impact of a number of different scenarios.
	Costing and Reporting Occupational Health and Safety	To measure and report occupational health and safety performance in a manner which line managers can understand and relate to, and which demonstrates the advantages of committing to an effective prevention/rehabilitation program.
	Costing and Reporting Workers Compensation Claims	To equitably allocate the annual workers compensation premium between departments and determine the periodic and annual actual costs of claims.
	Measuring Workforce Productivity and Efficiency	To measure staff productivity levels in order to ascertain the effectiveness, utilisation and correct application of enterprise bargaining agreements and/or conditions of employment provided for employees throughout the organisation.

Module	Measure and/or Report	Objective
Module 4: Measuring Organisational Development & Recruitment	Measuring Training Expenditure	To accurately report on training expenditure throughout the organisation in order to determine individual departmental commitment and support.
	Measuring Training Hour Allocation	To identify where structured training hours are being provided to employees throughout the organisation in order to determine individual departmental commitment and support.
	Measuring and Reporting Training Effectiveness	To evaluate the effectiveness of structured training programs being provided within the organisation.
	Measuring Training Course Outcomes	To determine whether the expenditure incurred in developing and delivering the training course has been justified, and if the content has been properly structured and effectively delivered to course participants.
	Measuring Talent Management and Succession Planning	To measure and demonstrate the real benefits of talent management and succession planning successfully applied throughout the organisation.
	Workforce Capacity	To forecast additional or redundant positions for the next financial year according to turnover rates and business initiatives, in order to develop recruitment, redeployment and/or exit plans.
	Workforce Profile	To categorise employees by age groups and generations to identify workforce spread, potential gaps in experience and capability and varying expectations by generation.
	Measuring Recruitment and Hiring	To measure the real impact of a professional and effective recruitment and hiring program and its benefits to the organisation.

Module	Measure and/or Report	Objective
Module 4: Measuring Organisational Development & Recruitment — *cont.*	Measuring Performance Management	To maximise workforce performance by ensuring that employees understand and accept their individual contribution and accountabilities, are adequately skilled and equipped to perform at optimum level, and receive regular and objective feedback regarding their performance and career development.
Module 5: Measuring Remuneration, Benefits & HR Administration	Measuring Payroll Performance	To ensure that all transactions regarding an employee's remuneration or conditions of employment are administered as accurately and as expeditiously as possible, and at the least possible cost to the organisation.
	Measuring Accrued Annual Leave	To ensure that all employees regularly use available leave entitlements in accordance with relevant company policy/legislation/awards and at minimum cost to the organisation.
	Measuring HR Policies and Procedures	To evaluate whether policies and procedures as provided to line managers and employees throughout the organisation are contemporary, competitive, consistent, and easy to understand and apply.
	Measuring Remuneration Programs	To measure and evaluate whether company remuneration and benefit programs enable the organisation to attract, retain and motivate competent employees, and which reinforce organisational performance and values.

Module	Measure and/or Report	Objective
Module 6: Measuring Organisational Workforce Performance	Measuring Workforce Headcount, Expenditure and/or Utilisation	To effectively measure labour utilisation performance throughout the organisation and to properly evaluate and control changes to staff numbers.
	Measuring and Costing Staff Turnover	To identify the number and percentage of permanent employees whose termination from the organisation is unplanned, the regularity of such terminations, and the cost impact/ramifications of such turnover.
	Measuring and Costing Staff Absenteeism	To identify the percentage of employees who are absent from the organisation on unplanned leave, the regularity of such absenteeism and the cost impact/ ramifications of such staff absenteeism.
	Measuring Exit Interviews	To receive confidential feedback from employees leaving the organisation in relation to their reasons for departure and satisfaction levels with the organisation throughout the course of their employment.
	Workforce Attitude Surveys	To receive structured and confidential feedback from employees in relation to their perceptions of, and satisfaction levels with, the organisation.
Module 7: Measuring Returning Investment	Measuring Return on Investment	To demonstrate financial cost vs benefit of HR-related projects in order to either justify or decline a HR or internal client initiative.

Introduction to HR Measurement

Setting the Scene

The business environment has changed profoundly over the past decade. Whether you are in the private or public sector, or in a large or small organisation, you are now part of a global marketplace where competition is fierce.

In today's demanding and competitive business climate CEOs are constantly seeking out new opportunities to sustain their organisations and create sources of competitive advantage. Increasingly they turn to the HR team to deliver products and services that will optimise workforce performance and create a source of differentiation in the marketplace. Line managers find themselves occupying larger roles with shrinking resources, facing constant pressure to deliver more with less. They need support from HR teams who genuinely understand their needs and deliver value-added services in a cost-effective manner.

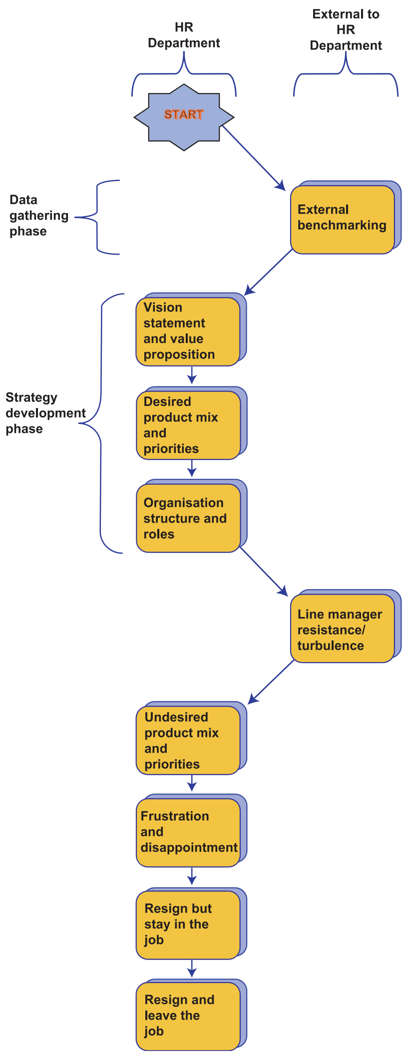
To survive and prosper in this new era, HR practitioners must:

- recognise and appreciate that the principles of measurement, evaluation and forecasting are an important part of the lifeblood of any organisation, and are practised by line managers every day in every facet of the business;
- embrace the principles of measurement and reporting across all functional activities and amongst all members of the HR team;
- place far greater importance and emphasis on the collation, preparation, distribution and leveraging of integrated and meaningful data than they have in the past;
- be capable of regularly producing comprehensive data and reporting which reflects the organisation's overall HR performance;
- become more business aligned and commercially focused in developing their strategies, and in prioritising their intended new products and services; and
- be capable of demonstrating the value and return on investment to the organisation for an intended new HR product or service.

Developing an Integrated HR Strategy

To assist HR professionals to achieve these objectives, the following paragraphs contrast models for creating ineffective and effective HR strategies.

Ineffective HR Strategy Formulation



This model highlights a process that is not recommended, but too often is observed being adopted by HR professionals, often to their detriment.

The components of this model go together as follows:

1. External benchmarking

Based upon the HR professional's previous work experience, observations and interactions with other professionals, they are confident that they bring to their new organisation an understanding of what is important, what is contemporary and what good organisations are doing.

2. Vision statement and value proposition

Based upon the same premise as outlined in Step 1, the HR professional can quickly and easily prepare a vision statement and value proposition which outlines the role HR should play in the organisation, combined with the value-added contribution it should make.

3. Desired product mix and priorities

Based upon the outcomes of 1 and 2, the HR professional quickly prepares a plan outlining the HR products and services that they believe the organisation needs, in priority order.

4. HR structure and roles

Complementing the strategy and priorities developed, the HR professional identifies the HR structure, resources and budgets desired in order to 'make things happen'.

5. Line manager resistance/turbulence

Because there has been no thorough evaluation and identification of current organisational HR performance — no compilation of supporting data, no real effort to understand the organisation and the priorities of key line managers and no demonstrable correlation between these factors and the products and services the HR professional seeks to design and introduce — the HR professional encounters unexpected resistance from internal customers who do not understand the need for new products and services or the value-added contribution the products and services will potentially make to the business.

6. Undesired product mix and priorities

Because of the factors outlined in Step 5, the HR professional is partially or totally unsuccessful in gaining support for their plan. Instead they are forced to comply with a range of requests for rudimentary products and services that may be low priority or of little real value.

7. Frustration and disappointment

The HR professional becomes increasingly frustrated and disappointed with key line managers.

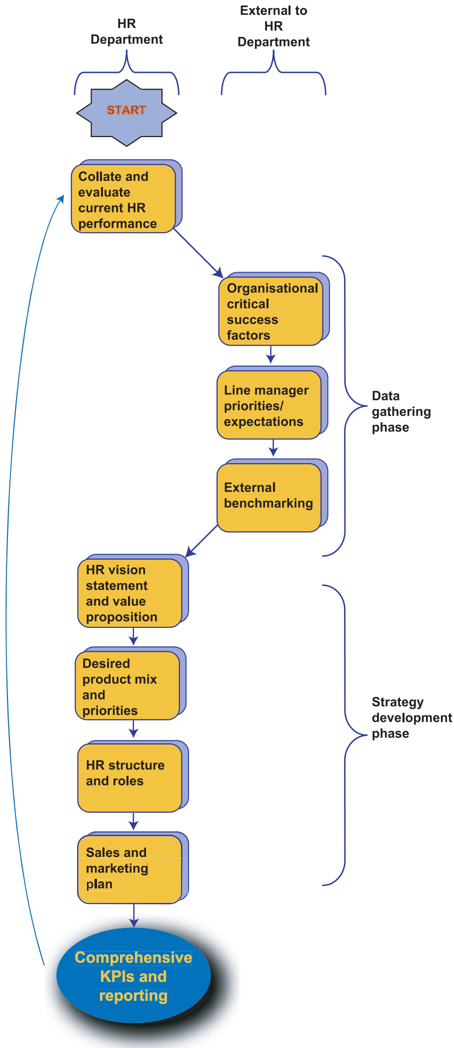
8. Resign but stay in the job

The HR professional eventually abandons their desired plan, instead reluctantly accepting and fulfilling the role the organisation has determined is appropriate. They offer only passive resistance, creating the external appearance of supporting the job and the organisation, while internally having actually resigned while remaining employed.

9. Resign and leave the job

The HR professional's frustration and disappointment are exacerbated to the point whereby they decide to seek alternative employment, eventually resigning from the organisation altogether.

Effective HR Strategy Formulation



An ongoing commitment to research, analysis and measurement reporting is required prior to strategy development if you are to enjoy long-term, meaningful results.

This model demonstrates the recommended process for use upon commencement with a new organisation and thereafter on an annual basis.

Our model starts with an in-depth analysis of current organisational HR performance and ends with the development and implementation of comprehensive HR reporting.

The components of this model are:

1. Collate and evaluate HR performance

Initially collate and analyse as much indicative data as possible in relation to the current HR performance of the organisation. At a very basic level, this may include data on staff turnover, absenteeism, exit interviews, staff mix (including overtime, casual and contract hours), training expenditure and workers compensation.

We recommend that you actively seek out and establish positive relationships with the Payroll and Accounts Payable Departments who can assist you in obtaining accurate/real data in the following key areas:

Payroll

Headcount, staff mix, overtime/casual hours, staff turnover and absenteeism, annual leave liability.

Accounts Payable

Use of independent contractors, external consultants and other providers; expenditure on external training courses and tertiary assistance programs; recruitment expenditure including advertising costs, consultants' fees, pre-employment tests etc.

More information about these measures is contained in Module 2: KPIs and Monthly Reporting.

2. Organisational critical success factors

Most organisations operate using a set of critical success factors that underpin the sustainability and ongoing success of the organisation (i.e. product range, customer service, price and quality). Whether these factors are formalised or implicit, it is important to understand what makes the organisation 'tick' in order to determine how HR projects and initiatives can directly contribute to the achievement of these factors on an ongoing basis.

3. Key line manager priorities and expectations

Coinciding with the identification of the organisation's critical success factors, it is essential to spend sufficient time with key line managers to gain a real appreciation of their business functions, major priorities, projects and expectations from the HR department. Again, this is in order to determine how HR projects and initiatives can directly contribute to the achievement of these objectives.

4. External benchmarking

To ensure that the HR strategy is contemporary and competitive, a review of other organisations and current trends in HR management is recommended.

5. Vision statement and value proposition

When steps 1 to 4 have been fully developed, it is then possible to create a HR vision statement and value proposition that is aligned with and supportive of the organisation and its objectives.

6. Desired product mix and priorities

Having completed a thorough evaluation of the organisation and the HR function, it is now possible to identify and prioritise HR products and services that are aligned with the fundamental needs of the business, add value to the organisation and contribute to bottom-line results.

7. Organisation structure and roles

Complementing the development of the organisational HR plan, it is now possible to create the most cost-effective and functional organisation structure to design, deliver and sustain the products and services as previously identified.

8. Sales and marketing plan

Equipped with a full appreciation of the organisation, its business priorities and objectives and its current levels of HR performance, the HR professional can establish an integrated sales and marketing plan to leverage the HR agenda and gain support from key line managers.

9. Comprehensive KPIs and reporting

With the HR plan researched, developed, supported and in the process of being progressively implemented, a detailed set of KPIs and measurement and reporting tools must be established in order to evaluate ongoing performance and maintain the momentum.

More information about these measures is contained in Modules 3–7.

Workbook Instructions

Instructions on how to input data into each HR Measurement Toolkit Excel-based report are contained within each report's template. Upon opening the template, the 'Instructions' sheet will automatically be the first page viewed. The instructions have also been replicated in this booklet.

Please note that the instructions use cell references that relate to the workbook as it was originally designed. References may change if columns/rows are inserted or deleted.

Cell references containing '…' indicate that the instruction should be followed down the remainder of the cell reference's column.

Workbooks indicate steps to follow by including A, B, C etc. in the name of each worksheet. These steps are generally for guidance only.

Module 1: Introduction

No Excel workbooks and therefore no instructions required.

Module 2: KPIs & Monthly Reporting

Key Performance Indicator Report

(A) HR Key Performance Indicator Report Instructions

Step	Cell	Description
1	**D4**	Insert the name of the period being reported.
2	**G5**	Insert the name of the last period in **<insert last period>**.
3	**H5**	Insert the name of the current period in **<insert current period>**.
4	**C5...**	**Criteria** is the category of HR measures.
5	**D5...**	**Measure** contains a brief description of each measurement within each criteria.
6	**E5...**	**Description** contains an explanation of the purpose of the measures.

(A) HR Key Performance Indicator Report Instructions — continued

Step	Cell	Description
7	**F5...**	**Associated report** indicates the measurement report within the HR Measurement Toolkit that will assist in deriving the result to include in this report.
8	**G6...**	Insert results from the last period. In future periods, the rollover function will do this automatically.
9	**H6...**	Insert results for the current period.
10	**I5...**	**Change** will automatically calculate the difference between the current and last period.
11	**J5...**	YTD will be automatically calculated either as the sum of all periods or an average thereof, according to the criteria results being recorded.
12	**K6...**	Insert the Target figure for each measure. The target will be compared to YTD performance.
13	**L5...**	Variance to target will be calculated automatically by comparing YTD performance with the Target measure.

Macro Buttons

Hide Column	**[Hide Column]** will hide the selected column from view. To hide a column, select the column's name in row 5 and click on **[Hide Column]**.
Show Columns	**[Show Columns]** displays all columns within the worksheet. Columns that are not required may be hidden by using the **[Hide Column]** button.
Hide Criteria	**[Hide Criteria]** will hide the criteria selected. To hide a criteria, select the criteria's name in column C and click on **[Hide Criteria]**.
Show Criteria	**[Show Criteria]** displays all rows within the worksheet. Criteria that are not required may be hidden by using the **[Hide Criteria]** button.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

Module 3: Measuring Employee Relations & OHS

Employee Relations Status Report

(A1, A2 & A3) Costing Unfair Dismissal, EEO and Grievances

Step	Cell	Description
1		Follow the steps listed in the Costing Unfair Dismissal, EEO Claims and Workforce Grievance worksheets to derive a value that will be used in section (B).

(B) Employee Relations Status Report Instructions

Step	Cell	Description
1	L3	If additional departments are required, click Insert Dept. button.
2	E4	Insert period ‘from’.
3	H4	Insert period ‘to’.
4	I6	Insert a generic value to represent the cost of resolving an unfair dismissal claim. This value may be calculated using the **Costing Unfair Dismissal** worksheet. (To link these worksheets, type =’(A1) Costing Unfair Dismissal’!H25 after unprotecting the worksheet.)
5	I8	Insert a generic value to represent the cost of resolving an EEO claim. This value may be calculated using the **Costing EEO Claims** worksheet. (To link these worksheets, type =’(A2) Costing EEO Claims’!H25 after unprotecting the worksheet.)
6	I10	Insert a generic value to represent the cost of resolving a workforce grievance. This value may be calculated using the **Costing Workforce Grievances** worksheet. (To link these worksheets, type =’(A3) Costing Workf. Grievance’!H29 after unprotecting the worksheet.)
7	C14…	Type the name of each department.

(B) Employee Relations Status Report Instructions — continued

Step	Cell	Description
8	**E14…**	For each department and category (management and staff), enter the number of **Unfair Dismissal Claims** that have been **resolved** during the period (where resolved means no court/tribunal intervention required).
9	**F14…**	For each department and category (management and staff), enter the number of **Unfair Dismissal Claims** that are **unresolved** at the end of the period (where unresolved means that court/tribunal intervention is required).
10	**G14…**	The cost of resolved claims will be automatically calculated by multiplying the number of claims resolved by the generic costing.
11	**H14…**	For each department and category (management and staff), enter the actual costs incurred for **unresolved** claims (i.e. those requiring legal action).
12	**I14-P14…**	Repeat the process outlined through steps 8-11 for both **EEO Claims** and **Workforce Grievances**.
13	**Q14-T14…**	**Total company performance**, combining Unfair Dismissal, EEO Claims and Workforce Grievances will be automatically calculated.
14	**P6 & S6**	Summary performance will automatically calculate the number and cost of Unfair Dismissals, EEO Claims and Workforce Grievances in the Management category.
15	**P8 & S8**	Summary performance will automatically calculate the number and cost of Unfair Dismissals, EEO Claims and Workforce Grievances in the Staff category.
16	**P10 & S10**	Summary performance will automatically calculate the number and cost of Unfair Dismissals, EEO Claims and Workforce Grievances for the total company.

(B) Employee Relations Status Report Instructions — continued

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Graphs

ER Status Graph	View the results of the **Employee Relations Status Report** in the **ER Status Graph**.

Enterprise Bargaining Model

(A) Raw Data Worksheet Instructions

Stage	Step	Cell	Description
	1	**H4**	If additional job classifications are required, click on the **Insert Classification** button.
	2	**H6**	If additional labour on-costs are required, click on the **Insert On-costs** button.
1	**3**	**B9…**	Insert the name of each job classification to be included in the Enterprise Bargaining agreement.
	4	**D9…**	Insert the number of full-time equivalent employees (FTEs) for each classification based on the financial year just ended.
	5	**E9…**	Insert the average weekly wage for a FTE in each classification.
	6	**F9…**	The total wage cost (i.e. weekly wage x 52 weeks x number of FTEs) will be calculated automatically.
	7	**G9…**	The total wage cost per month will be calculated automatically (i.e. total wage cost p.a. divided by 12).
	8	**F17**	The total annual base wages cost will be calculated automatically.
2	**9**	**B21…**	Insert any labour on-costs that will impact the agreement.
	10	**C21…**	Include a description of each labour on-cost.
	11	**F21…**	Insert the total annual cost for each on-cost category.
	12	**G21…**	The labour on-costs per month will be calculated automatically.
	13	**F32**	The total annual labour costs (i.e. base wages plus on-costs) will be calculated automatically.

(B) EB Model Instructions

Stage	Step	Cell	Description
	1	**B2**	If additional options are required, click on the **Insert Option** button.
	2	**B3**	If additional periods within an option are required, click on the **Insert Interval** button.
	3	**F4**	For the first option, type the option number to identify.
3	**4**	**G5**	For the first option, type a brief description of the option (e.g. 8% over 2 years)
	5	**H6**	Insert the date upon which the agreement will commence.
	6	**H7**	Insert the date upon which the agreement will end.
	7	**H8**	Insert the number of months for which the agreement will be effective.
	8	**H10**	Insert the total percentage increase that will apply over the term of the agreement.
4	**9**	**G12–J12**	Insert the dates upon which each increase becomes effective (i.e. each interval). If additional periods are required, click **Insert Interval**.
	10	**G13–J13**	Insert the number of months remaining in the agreement from the date of the increase (e.g. second increase at six months into a 24 month agreement means this increase will be applicable for 18 months).
	11	**G14–J14**	Insert the percentage increase applicable at each interval.
5	**12**		All calculations in the fifth stage will be automatic.
6	**13**	**B44…**	Insert a description of each indirect increase (e.g. introduction of health plan). If additional indirect costs are required, click **Insert Indirect**.
	14	**C44…**	Insert the date the indirect increase is effective.
	15	**D44…**	Insert the estimated annual cost of each indirect increase.
	16	**E44…**	The estimated cost per month will be calculated automatically.

(B) EB Model Instructions — continued

Stage	Step	Cell	Description
	17	**K44…**	Using the monthly estimated cost, multiply this by the number of months during the agreement for which the indirect increase will be applicable (e.g. healthplan estimated at $2,000 per month introduced at the start of the second year of a 24 month agreement = $2,000 x 12 months)
	18	**M44…**	If the indirect increase will have a recurring cost once the agreement finishes, insert the estimated ongoing annual cost.
7	**19**	**B57…**	Insert a description of each anticipated saving. If additional savings are required, click **Insert Proposed Savings**.
	20	**C57…**	Insert the date each saving is effective.
	21	**D57…**	Insert the estimated annual saving for each category.
	22	**C57…**	The estimated saving per month will be calculated automatically.
	23	**K57…**	Using the monthly estimated saving, multiply this by the number of months during the agreement for which the saving will be applicable.
	24	**M57…**	If the saving will have a recurring benefit once the agreement finishes, insert the estimated ongoing annual saving.

(C) EB Summary

Step	**Cell**	**Description**
		All cells and calculations within the EB — Summary worksheet will be calculated automatically.

Macro Buttons

Insert Classification	**[Insert Classification]** will insert an additional employee classification in **Raw data**.
Insert On-costs	**[Insert On-costs]** will insert an additional row for labour on-costs in **Raw data**.
Insert Indirect	**[Insert Indirect]** will insert an additional row for Indirect Increases in **EB model**.
Insert Savings	**[Insert Proposed Savings]** will insert an additional row for savings in **EB model**.
Insert Option	**[Insert Option]** will insert an additional option within the **EB model**.
Hide Option	**[Hide Option]** will hide the option within the **EB model** that is selected.
Insert Interval	**[Insert Interval]** will insert an additional period within an option in the **EB model**.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

OHS Report

(A) OHS Report Instructions

Step	Cell	Description
1	**J3**	If additional departments are required, click **Insert Dept.** button.
2	**C5**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**F8**	Type the name of the current period.
4	**C10…**	Type the name of each department.
5	**F10…**	For each department and category (management and staff) in the current period, insert the **Lost time injuries** for the period. This is the number of incidents that have involved an injury which has resulted in an absence from work for one day or more.
6	**G10…**	For each department and category (management and staff) in the current period, insert the **Lost time days** for the period. This is the number of days lost to injury for the period.
7	**H10…**	The **Average duration rate** of a lost time injury for the period will be automatically calculated, and rounded up to the nearest whole number.
8	**I10…**	The **Frequency rate** (i.e. number of lost time injuries per 1,000,000 employee hours worked) will be automatically calculated.
9	**J10…**	Year to Date (YTD) **Lost time injuries** will be automatically calculated.
10	**K10…**	Year to Date (YTD) **Lost time days** will be automatically calculated.
11	**L10…**	Year to Date (YTD) **Average duration rate** of a lost time injury will be automatically calculated, and rounded up to the nearest whole number.
12	**M10…**	Year to Date (YTD) **Frequency rate** (i.e. number of lost time injuries year to date per 1,000,000 employee hours worked) will be automatically calculated.
13	**C34…**	**Company totals** will be automatically calculated.

(A) OHS Report Instructions **—** continued

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the selected department from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 8 with your cursor and click on **[Hide Period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

OHS Graph	View the results of the **OHS Report** in the **OHS Graphs**.

Workers Compensation Report

(A) Workers Compensation Apportionment by Dept. Instructions

Step	Cell	Description
1	**H11**	Insert value of the annual workers compensation premium
2	**H13**	Insert the number of periods for which reports will be made (e.g. for monthly reporting, insert '12', for quarterly reporting, insert '4' etc.).
3	**D17…**	Type the name of each department.
4	**D2**	If extra departments are required, click **Insert Dept.** button.

(B) Workers Compensation Report

Step	Cell	Description
1	**C5**	Type the name of the current period.
2	**C9…**	Department names will be created automatically as a result of input in (A) Step 3.
3	**E9…**	The Workers Compensation value will be automatically created as a result of input in (A).
4	**F9…**	For each department in the current period, insert the value of **Under Excess claims** in the period (i.e. any wages or medical costs incurred that are non-claimable through premium coverage).
5	**G9…**	For each department in the current period, insert the **cost of replacing** the injured employee in the period (i.e. through casual hours, overtime or a limited tenure employee).
6	**H9…**	For each department in the current period, insert the **cost of re-training** injured employees in the period to provide them with work.
7	**I9…**	For each department in the current period, insert the **Resource costs** for the period (i.e. the costs incurred in providing a workers' compensation program).

(B) Workers Compensation Report — continued

Step	Cell	Description
8	**J9…**	For each department in the current period, insert the **Administrative costs** for the period (i.e. the costs incurred in investigating near misses or incidents, arranging alternative duties, attending safety committee meetings).
9	**K9…**	Totals for the period will be automatically calculated.
10	**C17…**	Total company will be automatically calculated.
11	**L9…Q9**	Year-to-date balances will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the selected department from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 7 with your cursor and click on **[Hide Period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Graphs

Workers Compensation Graph	View the results of the **Workers Compensation Report** in the **Workers Compensation Graph**.

Module 4: Measuring Organisational Development & Recruitment

Training & Development Expenditure Report

(A1 & A2) External and Internal Training Course Expenditure

Step	Cell	Description
1		Follow the steps listed in the External and Internal Training Course Expenditure worksheets to derive a cost that will be used in section (B).

(B) Training & Development Expenditure Report Instructions

Step	Cell	Description
1	**K3**	If additional departments are required, click on the **Insert Dept.** button.
2	**E4**	Type in the name of the period to which the report relates in the **Period Ending** cell.
3	**F6**	Type the name of the current period.
4	**C9…**	Type the name of each department.
5	**F9…**	For each department and category (management and staff), insert the **Total wages/salaries expenditure** for the period.
6	**G9…**	For each department and category (management and staff), insert the **Direct training expenditure** for the period.
7	**H9…**	The percentage of direct training expenditure will be automatically calculated.
8	**I9…**	For each department and category (management and staff), insert the **Indirect training expenditure** for the period.
9	**J9…**	The percentage of indirect training expenditure will be automatically calculated.

(B) Training & Development Expenditure Report Instructions — continued

Step	Cell	Description
10	**K9–L9…**	The total expenditure and percentage will be calculated automatically.
11	**M9…**	For each department and category (management and staff), insert the **Total workforce hours** utilised in the period.
12	**N9…**	For each department and category (management and staff), insert the **Total workforce hours** allocated to direct training for the period.
13	**O9…**	The percentage of total training hours for the period will be automatically calculated.
14	**G33**	Insert any other direct expenditure associated with training that cannot be assigned to a particular department.
15	**I33**	Insert any other indirect expenditure associated with training that cannot be assigned to a particular department.
16	**K33**	Total other indirect expenditure will be calculated automatically.
17	**C34**	**Total company** will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Expenditure other**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. The YTD report will automatically include any previous and new periods.

(B) Training & Development Expenditure Report Instructions — continued

Macro Buttons

Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 6 and click on **[Hide period]**.
Show periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Training & Development Expenditure Report YTD Instructions

Report YTD	**Training & Dev Expenditure YTD** results will be automatically calculated from the periodic report. The following step should also be noted:

Step	Cell	Description
1	**E4**	Insert the name of the period that the report is up to and including.

(D) Training & Development Expenditure Graphs

Training Expend Graphs	View the results of the YTD **Training and Development** expenditure report in the **Training Expend Graphs**.

Training Hours Allocation Report

(A) Training Hours Report Instructions

Step	Cell	Description
1	H3	If additional departments are required, click on the **Insert Dept.** button.
2	D4	Type the name of the period to which the report relates in the **Period ending** cell.
3	E6	Type the name of the current period.
4	C8…	Type the name of each department.
5	E8…	For each department and category (management and staff), insert the **Average headcount** for the period.
6	F8…	For each department and category (management and staff), insert the **Total training hours** for the period.
7	G8…	**Average training hours per employee** will be automatically calculated.
8	H8–J8…	**Year-to-date** results will be automatically calculated.
9	K8…	Projected training hours per employee at year-end can be calculated by dividing the total training hours YTD by total number of periods reported to date, and then multiplying the result by total number of periods in a year to determine projected annual figure.
10	C32	**Total company** will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.

(A) Training Hours Report Instructions **—** continued

Macro Buttons

Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 6 and click on **[Hide Period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Training Hrs Graphs	View the results of the **Training Hours Allocation Report** in the **Training Hours Graphs**.

Training Performance Report

(A) Training Performance Report Instructions

Step	Cell	Description
1	**F2**	If additional departments are required, click on the **Insert Dept.** button.
2	**D6**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**E11**	Type the name of the current period.
4	**C13…**	Type the name of each department.
5	**E13…**	For each department and category (management and staff), insert the **Training participation rate** percentage for the period. This is the number of employees who actually attended structured training programs divided by the number actually enrolled.
6	**F13…**	For each department and category (management and staff), insert the **Successful course completions** percentage for the period. This is the percentage of participants who successfully completed a structured training program.
7	**G13…**	For each department and category (management and staff), insert the **Participant satisfaction** percentage for the period. This is the average satisfaction score from participants.
8	**H13–J13…**	**Year-to-date** results will be automatically calculated.
9	**H6**	Insert a benchmark company result for the **Training participation rate**.
10	**I6**	Insert a benchmark company result for the **Successful course completions** rate.
11	**J6**	Insert a benchmark company result for the **Participant satisfaction** percentage.
12	**C37…**	Actual **Total company** results YTD will be calculated automatically.

(A) Training Performance Report Instructions — continued

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 11 with your cursor and click on **[Hide period]**.
Show periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Performance Graphs	The results of the **Training Performance Report** can be viewed in the **Performance Graphs**.

Talent Management and Succession Planning Report

(A1 & A2) Costing Planned and Unplanned Appointments

Step	Cell	Description
1		Follow the steps listed in the Costing Planned and Unplanned worksheets to derive a differential cost that will be used in section (B).

(B) Succession Planning Report Instructions

Step	Cell	Description
1	**P4**	If additional departments are required, click **Insert Dept.** button.
2	**C5**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**C7**	Insert the differential cost of external appointment (i.e. cost of external vs internal appointment). Values can be derived from **Costing Unplanned** and **Planned Appointment** worksheets.
4	**C11…**	Type the name of each department.
5	**D9**	For the first use of this report, insert the name of the last period in the **<Insert last period name>** cell. In subsequent periods when the Rollover is used, the name and results of the last period will copy over automatically.
6	**D11…**	For each department, insert the number of positions filled by internal appointment during the period.
7	**E11…**	For each department, insert the number of positions filled by external appointment during the period.
8	**F11…**	Number of positions filled during the period will be automatically calculated.
9	**G11…**	Percentage of positions filled internally will be automatically calculated.
10	**H11…**	Percentage of positions filled externally will be automatically calculated.

(B) Succession Planning Report Instructions — continued

Step	Cell	Description
11	**I11…**	Total cost of external appointments will be automatically calculated (i.e. number of external appointments x differential cost of external appointments).
12	**J9–O18**	Repeat steps 5–11 for the current period.
13	**P11–U18**	Year-to-date results will be automatically calculated.
14	**D19…**	**Total company** will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 9 and click on **[Hide period]**.
Show periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Talent Management Report Instructions

Step	Cell	Description
1	**H4**	If additional departments are required, click **Insert Dept**. button.
2	**C5**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**C10…**	Type the name of each department.
4	**D8**	For the first use of this report, insert the name of the last period in the **<Insert last period name>** cell. In subsequent periods when the Rollover is used, the name and results of the last period will copy over automatically.
5	**D10…**	For each department, insert the % of critical roles with two ‘ready now’ successors for the last period.
6	**E10…**	For each department, insert the % of critical roles without two ‘ready now’ successors for the last period.
7	**F8–G17**	Repeat steps 4–6 for the current period.
8	**H10–I17**	Variation between the last and current period will be calculated automatically.
9	**D18…**	**Total company** will be automatically calculated.

(D) Graphs

Succession & Talent Graphs	View the results of the **Succession Planning and Talent Management Status Reports** in the **Succession & Talent Graphs**.

Workforce Capacity Report

(A) Workforce Capacity Report KPI Instructions

Step	Cell	Description
1	E5	Type the name of the financial year to which the report relates in the **New financial year commencing** cell.
2	E8	Insert the total revenue for the previous financial year.
3	E9	Insert the total revenue for the financial year just ended.
4	E10	Insert the total revenue projected for the new financial year.
5	F9 & F10	The percentage change in total revenue will be calculated automatically.
6	E13	Type the number of permanent staff at the end of the previous financial year.
7	E14	Type the number of permanent staff for the financial year just ended.
8	E15	Insert the projected number of permanent staff for the new financial year.
9	F14 & F15	The percentage change in headcount will be calculated automatically.
10	E18	Insert the average staff turnover rate for the previous financial year.
11	E19	Insert the average staff turnover rate for the financial year just ended.
12	E20	Insert the projected average staff turnover rate for the new financial year.
13	F19 & F20	The percentage change in turnover rate will be calculated automatically.
14	E23	Insert the staff retirement rate for the previous financial year.
15	E24	Insert the retirement rate for the financial year just ended.
16	E25	Insert the retirement rate projected for the new financial year.

(A) Workforce Capacity Report KPI Instructions — continued

Step	Cell	Description
17	**F24 & F25**	The percentage change in retirement rate will be calculated automatically.
18	**E28…**	For your current workforce, insert the number of employees in each age group.
19	**F28…**	The percentage of the total workforce represented by each age group will be calculated automatically.

(B) Workforce Capacity Report Instructions

Step	Cell	Description
1	**E4**	Type the name of the financial year to which the report relates in the **New financial year commencing** cell.
2	**C9…**	Type the name of the job classifications for which you will be tracking capacity. If additional job classifications are required, click on the **Insert Job** button.
3	**E9…**	Insert the number of permanent staff at the end of the previous financial year.
4	**F9…**	Insert the number of permanent staff for the financial year just ended.
5	**G9…**	The change in the number of permanent staff will be calculated automatically.
6	**H9…**	The percentage change in the number of permanent staff will be calculated automatically.
7	**I9…**	Insert the expected change in the number of staff for the new financial year based on revenue projections.
8	**J9…**	The expected percentage change in the number of permanent staff based on revenue will be calculated automatically.
9	**K9…**	The number of staff projected for the end of the new financial year after revenue changes have been considered will be calculated automatically.

(B) Workforce Capacity Report Instructions — continued

Step	Cell	Description
10	**L9…**	Insert the number of projected additional (+) or redundant (-) positions during the new financial year. These changes are separate from changes as a result of revenue targets (as per step 7).
11	**M9…**	A revised employee total that takes account of the additional/redundant positions will be calculated automatically.
12	**N9…**	Insert the projected change of staff stemming from normal annual turnover. Turnover is represented here as a positive because it is a position that needs to be filled (e.g. five positions expected to be vacant as a result of turnover will be +5).
13	**O9…**	The percentage that the turnover represents with reference to the revised employee total (in Step 11) will be calculated automatically.
14	**P9…**	Insert the number of projected retirements during the new financial year (as a positive). Retirements are separate from any usual turnover, redundancies or revenue changes.
15	**Q9…**	The percentage that the retirements represent with reference to the revised employee total (in Step 11) will be calculated automatically.
16	**R9…**	The total number of vacancies for each job classification will be calculated automatically.
17	**S9…**	Insert any comments to explain the changes for each job classification.
18	**C17…**	Company totals will be calculated automatically.

(B) Workforce Capacity Report Instructions — continued

Macro Buttons

Insert Job.	**[Insert Job]** will insert an additional job classification between the last job and **Total company**.
Delete Job.	**[Delete Job]** will delete the job classification selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Graphs

Capacity Graphs	View the results of the Workforce Capacity Report in the **Capacity Graphs**.

Workforce Profile Report

(A) Workforce Profile Report Instructions

Step	Cell	Description
1	**D5**	Insert the name of the current period in the Period ending cell.
2	**E8**	The first time the report is used, type the name of the previous period in <last period name>. In subsequent periods, this information will be input automatically when the Rollover Period button is used.
3	**H8**	Insert the name for the current period in <this period name>.
4	**E10–18 & E20–23**	Insert the number of full-time equivalent employees for each employee category for last period. Note, the Table of Age by Generation on tab (C) may help you identify the generational group for each employee according to their age or year of birth.
5	**F10…**	The percentage of total company FTEs for each category will be calculated automatically.
6	**G10–18 & G20–23**	Insert the average length of service in years for each employee category for the last period.
7	**H10–J18 & H20–23**	Repeat the process for columns H, I and J for the current period.
8	**K10–M18 & K20–M23**	Overall change between the current and last period will be calculated automatically.
9	**N10–18 & N20–23**	Insert any comments to support the trends noted.

(A) Workforce Profile Report Instructions — continued

Macro Buttons

Rollover period	**[Rollover Period]** will insert a new period to the left of the variation on last period section. The results from the most recent period will copy to the Last period results, and the period prior to that will move to a separate column. At this stage, insert the new period's name in <Insert period name>.
Hide period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 8 and click on **[Hide period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Workforce Profile Graphs	View the results of the **Workforce Profile Report** in the **Workforce Profile Graphs**.

(C) Table of Age by Generation

Table of Age by Generation	Access this quick reference table to determine the generational group to which an employee belongs.

Recruitment Status Report

(A1 & A2) Vacancy Costings

Step	Description
1	Follow the steps listed in the management and staff vacancy costing worksheets to derive either a generic company or department specific value. This will be used in section (B).

(B) Recruitment Status Report Instructions

Step	Cell	Description
1	**H3**	If additional departments are required, click **Insert Dept.** button.
2	**E4**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**G9**	Insert the name of the current period in the <Insert current period name> cell.
4	**C11…**	Type the name of each department.
5	**F11…**	For each department and for each category (staff and management), insert the daily cost for a vacant position. Use the M'gment Vacancy Costing and Staff Vacancy Costing worksheets to help calculate the value.
6	**G11…**	For each department and for each category (staff and management), insert the number of **Positions filled** during the period. Exclude casuals, agency staff and independent contractors.
7	**H11…**	For each department and for each category (staff and management), insert the number of positions still to be filled at the end of period. Exclude casuals, agency staff and independent contractors.
8	**I11…**	For each department and for each category (staff and management), insert the total number of days required to fill the positions counted in step 6.
9	**J11…**	The average number of days required per filled position will be automatically calculated (i.e. total days required to fill positions divided by number of positions filled).
10	**K11…**	The total cost of vacancies will be automatically calculated (i.e. average days required to fill positions multiplied by the average cost per day).

(B) Recruitment Status Report Instructions — continued

Step	Cell	Description
11	**L11…**	Insert any additional expenditure that is attributable to the positions filled (e.g. advertising, medicals, agency fees, etc.).
12	**C35…**	**Total company** results will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 9 and click on **[Hide Period]**.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Recruitment Status Report YTD Instructions

Report YTD	**Recruitment Status Report YTD** will calculate most balances automatically.

Step	Cell	
1	**I3**	Type the name of the period to which the report relates in the **Period ending** cell.
2	**M11…**	The Year-to-date report also includes a column for retention over 6 months. Enter the average % of employees retained YTD for 6 months or more from date of commencement.

(D) Graphs

Recruitment Status Graphs	View the results of the **Recruitment Status Report** in the **Recruitment Status Graphs**.

Module 5: Measuring Remuneration, Benefits & HR Administration

Accrued Annual Leave Report

(A) Accrued Annual Leave Report Instructions

Step	Cell	Description
1	**G3**	If additional departments are required, click **Insert Dept.** button.
2	**D4**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**H12**	Type the name of the current period.
4	**E12**	Type the name of the last period.
5	**D8**	Enter the **average cost of accruing excess days**. This is calculated by adding together the actual monetary cost of remuneration per employee, then dividing by the total number of employees with an excess balance.
6	**D10**	Enter the **projected percentage increase** in wages and salaries for the year.
7	**C15…**	Type the name of each department.
8	**H15…**	For each department and category (management and staff), enter the **Number of employees with excess balance** for the current period. An **Excess Balance** is an accrued annual leave balance in excess of 30 days.
9	**I15…**	For each department and category (management and staff), enter the **Total outstanding excess days** for the current period. This is the total number of days in excess of 30.
10	**J15…**	The dollar cost of excess days is automatically calculated.
11	**E15…**	The first time this report is used, type the **Number of employees with an excess balance** for last period. In subsequent periods, the balances will be copied using the Rollover function.
12	**F15…**	The first time this report is used, type the **Total outstanding excess days** for last period. In subsequent periods, the balances will be copied using the Rollover function.

(A) Accrued Annual Leave Report Instructions — continued

Step	Cell	Description
13	**G15…**	The dollar **Cost of excess days** is automatically calculated.
14	**K15…**	The projected annual cost is automatically calculated. It assumes monthly periods are reported, multiplying the current period's cost by 12 months at the projected rate of increase (i.e. D10)

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 12 and click on **[Hide Period]**.
Show Periods	**[Show Periods]** displays all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Annual Leave Graphs	View the results of the **Accrued Annual Leave Report** in the **Accrued Annual Leave Graphs**.

Module 6: Measuring Organisational Workforce Performance

Workforce Headcount Report

(A) Workforce Headcount Report Instructions

Step	Cell	Description
1	**L3**	If additional departments are required, click **Insert Dept.** button.
2	**D4**	Type the name of the period to which the report relates.
3	**C9…**	Type the name of each department.
4	**E9–I9…**	For each department and category (management and staff), insert the **Headcount for each employment** type at end of this period.
5	**J9–N9…**	For the first use of this report, type the **Headcount for each employment type for the last period**. In subsequent periods when the Rollover is used, last period results will copy over automatically.
6	**O9–S9…**	Variation on last period will be automtically calculated. A positive value means the **Headcount for the current period** has exceeded that of the last period.
7	**T9–X9…**	For each department and category (management and staff), insert the **Budgeted headcount** for the period.
8	**Y9–AC9...**	The variation between the **Headcount for the current period** and **budget** will be automatically calculated.
9	**C33**	**Total company** will be automatically calculated.

(A) Workforce Headcount Report Instructions — continued

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total Company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the left of the **Headcount at end of last period** column. The results from the most recent period will copy to the **Last period results**, and the period prior to that will move to a separate column. At this stage, insert the previous period's name in **<Insert past period name>**.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 7 and click on **[Hide period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Headcount Graphs	View the results of the **Workforce Headcount Report** in **Headcount Graphs**.

(C) Comments

Report comments	Explanatory comments/notes can be included in the **Comments** page and appended to the report.

Workforce Utilisation Report

(A) Workforce Utilisation Report Instructions

Step	Cell	Description
1	O3	If additional departments are required, click **Insert Dept.** button.
2	C5	Type the name of the period to which the report relates in the **Period ending** cell.
3	J7	Type the current period in the heading **Hours utilised <insert this period name>**.
4	E7	Type the last period in the heading **Hours utilised <insert last period name>**. In subsequent periods when the rollover function is used, this step will not be required.
5	C9…	Type in the name of each department.
6	J9…	For each department and category (management and staff), insert the **hours utilised** this period for **full-time** employees (where utilised = headcount x number of hours per day x number of working days in period).
7	K9…	For each department and category (management and staff), insert the **hours utilised** this period for **part-time** employees.
8	L9…	For each department and category (management and staff), insert the **hours utilised** this period for **casual** employees.
9	M9…	For each department and category (management and staff), insert the **hours utilised** this period for **contract** employees.
10	N9…	For each department and category (management and staff), insert the **overtime hours utilised** this period.
11	E9–I9…	Repeat steps 6-10 for last period. When the rollover function is used in subsequent periods, data for last period will be automatically copied from the previous ‘this period’ columns.
12	O9–S9…	The difference between this and last period will be automatically calculated. A positive value indicates that this period’s utilisation exceeded that of last period.
13	T9…	For each department and category (management and staff), insert the **budgeted hours** for the period for **full-time** employees.
14	U9...	For each department and category (management and staff), insert the **budgeted hours** for the period for **part-time** employees.

(A) Workforce Utilisation Report Instructions — continued

Step	Cell	Description
15	V9…	For each department and category (management and staff), insert the **budgeted hours** for the period for **casual** employees.
16	W9…	For each department and category (management and staff), insert the **budgeted hours** for the period for **contract** employees.
17	X9…	For each department and category (management and staff), insert the **budgeted overtime hours** for the period.
18	Y9-AC9…	The variation between actual and budgeted hours will be automatically calculated. A positive value indicates that this period's utilisation exceeded what was budgeted.
19	C33…	**Total company** will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and Total company.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 7 and click on **[Hide Period]**.
Show Periods	**[Show Periods]** displays all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Utilisation Graphs	Results from the **Workforce Utilisation Report** can be viewed in the **Utilisation Graphs**.

(C) Comments

Comments	Explanatory comments/notes can be included in the **Comments** section and appended to the report.

Workforce Expenditure Report

(A) Workforce Expenditure Report Instructions

Step	Cell	Description
1	**Q3**	If additional departments are required, click **Insert Dept.** button.
2	**D4**	Type the name of the period to which the report relates.
3	**C9…**	Type the name of each department.
4	**E9–J9…**	For each department and category (management and staff), insert the Total expenditure for each employment type at end of this period.
5	**K9–P9…**	For the first use of this report, type the **Total expenditure for each employment type** for the last period. In subsequent periods when the rollover is used, last period results will copy over automatically.
6	**Q9–V9…**	Variation on last period will be automtically calculated. A positive value means the **Expenditure for the current period** has exceeded that of the last period.
7	**W9–AB9…**	For each department and category (management and staff), insert the **Budgeted expenditure** for the period.
8	**AC9–AH9...**	The variation between the **Expenditure for the current period** and **budget** will be automatically calculated.
9	**C33**	**Total company** will be automatically calculated.

(A) Workforce Expenditure Report Instructions — continued

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the left of the **Total expenditure at end of last period** column. The results from the most recent period will copy to the **Last period results**, and the period prior to that will move to a separate column. At this stage, insert the previous period's name in **<Insert past period name>**.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 7 and click on **[Hide period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

Expenditure Graphs	View the results of the **Workforce Expenditure Report** in **Expenditure Graphs**.

(C) Comments

Report comments	Explanatory comments/notes can be included in the **Comments** page and appended to the report.

Workforce Turnover Report

(A1 & A2) Costing Management and Staff Turnover

Step	Description
1	Follow the steps listed in the Costing Management and Staff Turnover worksheets to derive either a generic company or department specific value. This will be used in section (B).

(B) Workforce Turnover Report Instructions

Step	Cell	Description
1	**J2**	If additional departments are required, click **Insert Dept.** button.
2	**D4**	Type the name of the period to which the report relates in the **Period ending** cell.
3	**F14**	Type the name of the current period.
4	**C16…**	Type the name of each department.
5	**E16…**	For each department input a value for the cost of a management position turnover. This value should be calculated using the **Costing Management Turnover** worksheet.
6	**E17…**	For each department input a value for the cost of a staff position turnover. This value should be calculated using the **Costing Staff Turnover** worksheet.
7	**F16…**	For each department and category (management and staff), insert the **Average headcount** for the period. To calculate the average, add the headcount for last period to the headcount for this period, and divide by 2.
8	**G16…**	For each department and category (management and staff), insert the **Number of terminations** made during the period. Use the date of separation to determine the period, rather than the date notice was given.
9	**H16…**	The **Turnover percentage** for the period will be automatically calculated.
10	**I16…**	The **Total cost of turnover** for the period will be automatically calculated.
11	**J14–M16…**	**Year-to-date results** will be automatically calculated.

(B) Workforce Turnover Report Instructions — continued

Step	Cell	Description
12	**C40**	**Company totals** will be automatically calculated.
13	**F8**	**Total management cost of turnover** for the period will be automatically calculated.
14	**F10**	**Total staff cost of turnover** for the period will be automatically calculated.
15	**F12**	**Total company cost of turnover** for the period will be automatically calculated.
16	**H8**	**Total management cost of turnover** for the year-to-date will be automatically calculated.
17	**H10**	**Total staff cost of turnover** for the year-to-date will be automatically calculated.
18	**H12**	**Total company cost of turnover** for the year-to-date will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 14 and click on **[Hide Period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Graphs

Turnover Graphs	The results of the **Workforce Turnover Report** can be viewed in the **Turnover Graphs**.

Workforce Absenteeism Report

(A1 & A2) Costing Management and Staff Absenteeism

Step	Description
1	Follow the steps listed in the Costing Management and Staff Absenteeism worksheets to derive either a generic company or department specific value. This will be used in section (B).

(B) Workforce Absenteeism Report Instructions

Step	Cell	Description
1	M3	If additional departments are required, click **Insert Dept.** button.
2	D4	Type the name of the period to which the report relates in the **Period ending** cell.
3	F15	Type the name of the current period.
4	C18…	Type the name of each department.
5	D7	Type in the standard paid hours per day for a management position. This value should have been used in the **Costing Management Absenteeism** worksheet.
6	D9	Type in the standard paid hours per day for a staff position. This value should have been used in the **Costing Staff Absenteeism** worksheet.
7	E18…	Type in the management cost of absenteeism per day for each department. This value should have been calculated using the **Costing Management Absenteeism** worksheet.
8	E19…	Type in the standard staff cost of absenteeism per day for each department. This value should have been calculated using the **Costing Staff Absenteeism** worksheet.
9	F18…	For each department and category (management and staff), insert the **total hours available** for the period (excluding temporary or casual employees) assuming all employees worked standard hours on working days.

(B) Workforce Absenteeism Report Instructions — continued

Step	Cell	Description
10	**G18…**	For each department and category (management and staff), insert the **total hours for the period** lost to **paid sick leave**.
11	**H18…**	The percentage of available hours lost to sick leave will be automatically calculated.
12	**I18…**	For each department and category (management and staff), insert the **total hours for the period** lost to **paid leave other** than annual or long service leave.
13	**J18…**	The percentage of available hours lost to **other paid leave** will be automatically calculated.
14	**K18…**	For each department and category (management and staff), insert the **total hours for the period** lost to **unpaid absences**, excluding parental leave.
15	**L18…**	The **percentage of available hours lost to unpaid absences** will be automatically calculated.
16	**M18…**	**Total unplanned absenteeism hours** will be automatically calculated.
17	**N18…**	**Unplanned absenteeism** as a percentage of available hours will be automatically calculated.
18	**O18…**	The **cost of unplanned absenteeism** for the period will be automatically calculated.
19	**P18…**	**Total hours available** for the year-to-date (excluding temporary or casual employees) assuming all employees worked standard hours on working days will be automatically calculated.
20	**Q18–V18…**	Year-to-date results will be automatically calculated.
21	**W18–Y18…**	Year-to-date results will be automatically calculated.
22	**C42…**	**Company Totals** will be automatically calculated.
23	**S7**	**Total management cost of absenteeism** for the period will be automatically calculated.
24	**S9**	**Total staff cost of absenteeism** for the period will be automatically calculated.
25	**S11**	**Total company cost of absenteeism** for the period will be automatically calculated.

(B) Workforce Absenteeism Report Instructions — continued

Step	Cell	Description
26	**W7**	**Total management cost of absenteeism** for the year-to-date will be automatically calculated.
27	**W9**	**Total staff cost of absenteeism** for the year-to-date will be automatically calculated.
28	**W11**	**Total company cost of absenteeism** for the year-to-date will be automatically calculated.

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Rollover Period	**[Rollover Period]** will insert a new period to the right of the previous period. YTD will automatically include any previous and new periods.
Hide Period	**[Hide Period]** will hide the selected period from view. To hide a period, select the period's name in row 15 and click on **[Hide Period]**.
Show Periods	**[Show Periods]** will display all periods within the worksheet. Periods that are not required may be hidden by using the **[Hide Period]** button.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Graphs

Absenteeism Graphs	The results of the **Workforce Absenteeism Report** can be viewed in **Absenteeism Graphs**.

Exit Interview Report

(A) Interview Questionnaire

Step	Cell	Description
1	**N2**	Print the questionnaire for completion by the employee.
2	**F14…**	Add the number of responses within each question category (e.g. number of ticks in Excellent for the three questions within the Wages/Salary/Benefits category).
3		At the end of the period, compile the interview questionnaires ready for the data entry process.

(B) Exit Interview Data Entry Instructions

Step	Cell	Description
1	**N3**	If additional departments are required, click **Insert Dept.** button.
2	**D4**	Insert period ‘from’.
3	**H4**	Insert period ‘to’.
4	**E6**	Insert the number of exit interview reports completed during the period.
5	**U5…AC8**	Insert the number of questions for which responses are required for each question category. The defaults have been included and will only require change if you add more questions.
6	**C14…**	Insert the name of each department.
7	**E14…**	For each department, insert the number of **respondents** for both management and staff categories. This is will be used in the calculations.
8	**F14–I14…**	In the **Wages/Salary/Benefits** columns, insert the number of responses for Excellent, Good, Fair and Unsatisfactory from the exit interview forms.
9	**J14…**	**Check** is used to make sure you’ve included the right number of responses. If the number of responses does not tally with the number of questions multiplied by number of respondents, ‘X’ will indicate the error. A tick will indicate that the figures balance.

(B) Exit Interview Data Entry Instructions — continued

Step	Cell	Description
10	**K14–N14…**	In the **Conditions** columns, insert the number of responses for Excellent, Good, Fair and Unsatisfactory from the exit interview forms.
11	**O14…**	Check will calculate automatically (see step 9).
12	**P14–S14…**	In the **Job satisfaction** columns, insert the number of responses for Excellent, Good, Fair and Unsatisfactory from the exit interview forms.
13	**T14…**	Check will calculate automatically (see step 9).
14	**U14–X14…**	In the **Personal relations** columns, insert the number of responses for Excellent, Good, Fair and Unsatisfactory from the exit interview forms.
15	**Y14…**	Check will calculate automatically (see step 9).
16	**Z14–AC14…**	In the **Participation & recognition** columns, insert the number of responses for Excellent, Good, Fair and Unsatisfactory from the exit interview forms.
17	**AD14…**	Check will calculate automatically (see step 9).
18	**AE14–AH14…**	In the **Opportunities for development** columns, insert the number of responses for Excellent, Good, Fair and Unsatisfactory from the exit interview forms.
19	**AI14…**	Check will calculate automatically (see step 9).
20	**AJ14–AK14…**	In the **Recommend company** columns, insert the number of responses for Yes and No from the exit interview forms.
21	**AL14…**	Check will calculate automatically (see step 9).
22	**AM14–AN14…**	In the **Seek re-employment** columns, insert the number of responses for Yes and No from the exit interview forms.
23	**AO14…**	Check will calculate automatically (see step 9).
24	**C30…**	**Total company** will be automatically calculated for each category.

(B) Exit Interview Data Entry Instructions — continued

Macro Buttons

Insert Dept.	**[Insert Dept.]** will insert an additional department between the last department and **Total company**.
Delete Dept.	**[Delete Dept.]** will delete the department selected from the worksheet.
Clear Data	**[Clear Data]** will clear all data from the worksheet, including hidden columns. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(C) Exit Interview Report Instructions

Results for the **Exit Interview Report** will be calculated automatically.

(D) Graphs

Exit Results Graph	View the results of the **Exit Interview Report** in the **Exit Results Graphs**.

Module 7: Measuring Return on Investment

ROI Costing Model

(A) ROI Costing Model Instructions

Step	Cell	Description
1	**E11**	Insert the name of the project.
2	**E15**	Type a brief description of the first projected benefit of the project.
3	**F15**	Assign a dollar value to the benefit described in step 2.
4	**E39**	Describe the assumptions made about the benefit.
5		Repeat steps 2, 3 and 4 for each benefit.
6	**E2**	If additional benefits are required, click on the Insert **Additional Benefits** button.
7	**I15**	Type a brief description of the first projected cost of the project.
8	**J15**	Assign a dollar value to the cost described in step 6.
9	**I39**	Describe the assumptions made about the cost.
10		Repeat steps 6, 7 and 8 for each cost.
11	**E4**	If additional costs are required, click on the **Insert Additional Costs** button.
12	**F29**	**Return on Investment** will be automatically calculated.
13	**F31**	If ROI exceeds 100%, the project will be classified **favourable**. Otherwise, **unfavourable** will be displayed.
14	**I35**	The project name will be automatically inserted as a result of step 1.
15	**E51**	Insert any **general notes** in regard to the project.

(A) ROI Costing Model Instructions — continued

Macro Buttons

Insert Additional Benefits	**[Insert Additional Benefits]** will insert space for the new benefit between the last benefit and Total benefits. A space for the associated assumption will be automatically included in the assumptions section, and a note number will beassigned.
Insert Additional Costs	**[Insert Additional Costs]** will insert space for the new benefit between the last benefit and Total benefits. A space for the associated assumption will be automatically included in the assumptions section, and a note number will be assigned.
Clear Data	**[Clear Data]** will clear all data from the worksheet. Formulae will be retained.
Print	**[Print]** will open the print preview screen. Margins and the page setup can be checked and modified in this screen.

Note: Yellow cells contain formulae and cannot be modified.

(B) Graphs

ROI Graphs	View the results of the **ROI Costing** in the **ROI Graphs**.

Examples

Examples	Six example ROI costings have been included with Graphs to demonstrate how to use the Costing Model.

How to Use

Minimum computer requirements

HR Measurement Toolkit is designed to operate on computers with the following minimum specifications:

	32 bit (Win 98, 2000, Me, XP, NT 4.0)
Processor	Pentium 166
RAM	32Mb
Display	VGA (SVGA)
Hard Disk	28Mb

HR Measurement Toolkit is compatible with **Microsoft Word and Excel 97 and above.**

Installation

To install *HR Measurement Toolkit*, place your CD-ROM into the appropriate drive. Some PC systems will automatically start the installation program. (If the program starts automatically, simply follow the on-screen step-by-step instructions.)

Windows 98, 2000, Me, XP and NT 4.0

From the **Start** menu select **Run** and enter the installation command:

***Driveletter:*\SETUP**

The *Driveletter:* will be your CD-ROM drive identification, e.g. D:\SETUP.

This will initiate the InstallShield Wizard, which will prompt you for information about yourself and your computer, and then complete the installation for you.

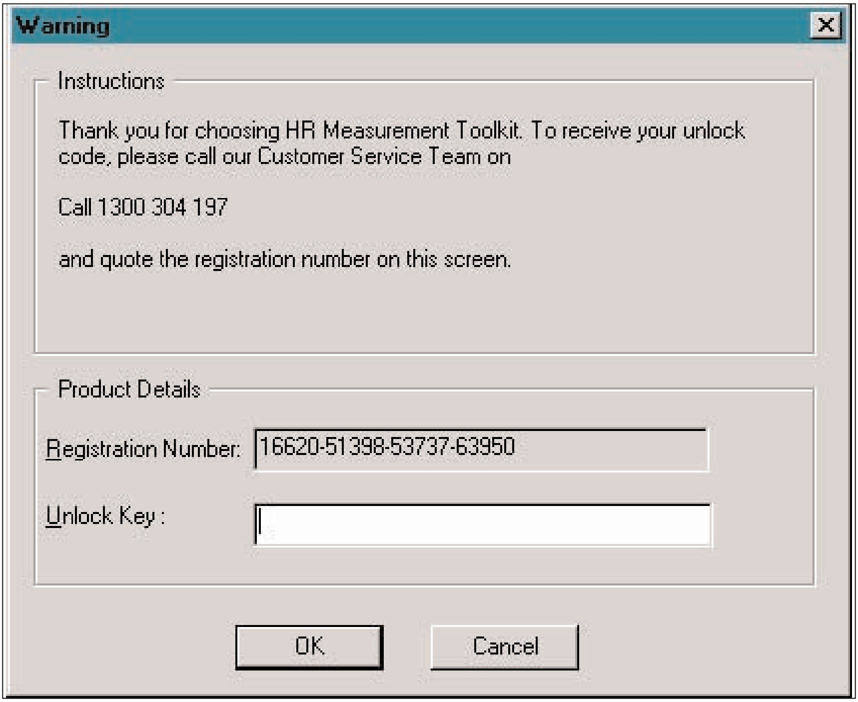
Getting started

Click on the **Start** button and scroll up to **Programs, CPD Business Tools** and select *HR Measurement Toolkit*.

Registration

HR Measurement Toolkit is required to be registered within **30** days of installation.

A registration screen similar to the following will be displayed every time you open *HR Measurement Toolkit* until you register, counting down 30 days after installation.



To register, call Thomson CPD on **1300 304 197**.

You will need to quote the **Registration Number** (including hyphens) displayed on your screen along with your **Customer Account Number** which is located on your Thomson CPD invoice or statement.

A member of our Customer Service Team will confirm your account and service details and quote your **Unlock Key** which you should enter as directed (including hyphens).

Click **OK**.

You are now registered to use **HR Measurement Toolkit** for the next 12 months.

Once you have opened the program, *HR Measurement Toolkit* main menu will be displayed on screen using Internet Explorer.

If you have any questions, please call Thomson CPD on **1300 304 197**.

Warning Message

A warning message will appear **30** days before expiry to ensure you are aware of the expected expiry date.

Renewals

An invoice will be sent with instructions on how to renew at the appropriate time.

If you have any questions, please call Thomson CPD on **1300 304 197**.

Finding your way around

Click once on the topic title to enter your chosen topic.

Each topic provides commentary with links to relevant Microsoft Word and Microsoft Excel templates.

Templates are also accessible from the template menu, which may be accessed from the main menu.

Microsoft Word templates

Alternative method of opening templates in Microsoft Word

Open Microsoft Word, select **File | New** from the Microsoft Word menu and locate the tab **HRMT**. Doubleclick on the title of the template you wish to open or highlight the template and click OK.

Using Microsoft Word templates

The templates in *HR Measurement Toolkit* have been designed so you can use your word processing skills to edit, cut, copy, paste and update the documents.

The templates are loaded into your computer's templates directory so you will always have the original documents to refer to.

You will be required to save any alterations you make; this will not overwrite the original documents. To save, choose **File | Save As** … from the Microsoft Word menu. Thomson CPD recommends you save your documents into your own directory structure.

Some handy shortcuts when using Microsoft Word are:

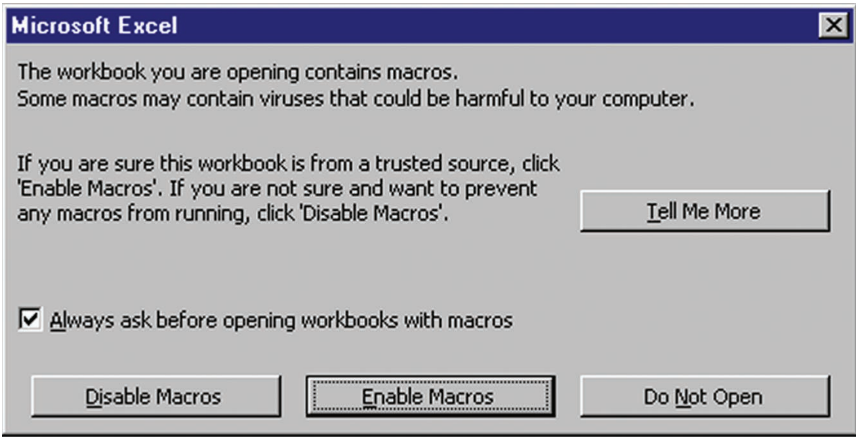
Ctrl + X	=	Cut
Ctrl + C	=	Copy
Ctrl + V	=	Paste
Ctrl + Z	=	Undo

To print Microsoft Word templates, select **File | Print** or Ctrl + P.

Microsoft Excel templates

Alternative method of opening templates in Microsoft Excel

Open Microsoft Excel, select **File | New** from the Microsoft Excel menu and locate the tab titled **HRMT**. Doubleclick the title of the template you wish to open or highlight the template and click OK.



When asked if you wish to enable macros, click **Enable Macros**. This will ensure hyperlinks and calculations are enabled.

The templates are loaded into your computer's templates directory so you will always have the original documents to refer to.

You will be required to save any alterations you make; this will not overwrite the original documents. To save, choose **File | Save As** … from the Microsoft Excel menu. Thomson CPD recommends you save your documents into your own directory structure.

Printing

To print workpapers, graphs and reports, we recommend you use the **Print buttons** located on the templates. These boxes are located on the individual worksheets and contain **preset print areas** to ensure all your data is printed when requested.

If you choose to use **File | Print** from the Microsoft Excel menu, please ensure you **set your print area before selecting Print**.

To set your print area in Excel 97, highlight the area you wish to print and select **File | Print area | Set print area**.

If you have used the **Hide Period** button on a template, the hidden columns/information will not be printed. To print this information, please use the **Show Periods** button to display all periods and then click Print.

Page and print settings can be altered in the **File | Print | setup …** dialog box.

List of Templates and Examples

Absenteeism, costing management (part of Workforce absenteeism report)

Absenteeism, costing staff (part of Workforce absenteeism report)

Annual (accrued) leave report

Appointment, cost of planned, internal (part of Talent management and succession planning status report)

Appointment, cost of unplanned, external (part of Talent management and succession planning status report)

Content map, visual

Discrimination claim costing worksheet (part of Employee relations status report)

Employee relations status report

- costing equal employment opportunity/discrimination/harassment claim worksheet
- costing unfair dismissal claims worksheet
- costing workforce grievances worksheet

Enterprise bargaining agreements, costing

Equal employment opportunity claim costing worksheet (part of Employee relations status report)

Exit interview report

Harassment claim costing worksheet (part of Employee relations status report)

HR key performance indicator report

HR strategy formulation model, effective

HR strategy formulation model, ineffective

Occupational health and safety report

Recruitment status report

Return on investment costing model worksheet and examples

- 1-day customer skills training workshop for 200 call centre staff
- 1-day employee counselling training workshop for 100 middle managers
- 2-day supervisory training workshop for 100 first level managers
- introduce a biannual safety audit program for 50 site managers
- introduce an integrated online HR policy manual for access by all staff
- introduce a self-managed safety audit program for 50 site managers

Talent management and succession planning status report

- cost of planned appointment (internal)
- cost of unplanned appointment (external)

Training and development expenditure report

- external training course expenditure report
- internal training course expenditure report

Training course expenditure report, external (part of Training and development expenditure report)

Training course expenditure report, internal (part of Training and development expenditure report)

Training course report (management)

Training course report (staff member)

Training hours allocation report

Training performance report

Turnover, costing management (part of Workforce turnover report)

Turnover, costing staff (part of Workforce turnover report)

Unfair dismissal claims costing worksheet (part of Employee relations status report)

Workers compensation costing report

Workforce absenteeism report

- costing management absenteeism
- costing staff absenteeism

Workforce capacity report

Workforce expenditure report

Workforce grievances costing worksheet (part of Employee relations status report)

Workforce headcount report

Workforce profile report

Workforce turnover report

- costing management turnover
- costing staff turnover

Workforce utilisation report

Troubleshooting

Problem	Solution
Protected Worksheets All worksheets have been protected to avoid inadvertent formula changes.	Unprotect the sheet by clicking **Tools | Protection | Unprotect sheet …** You will then be able to alter the worksheet if required. Thomson CPD does not support worksheets where the formula has been altered by the user.
Tabbing When I press **Tab** on the keyboard, my cursor moves away from the worksheet data entry area.	Ensure the box next to **Transition navigation keys** is unchecked in the **Tools | Options | Transition** tab area.
Comments There are no comments displayed in my spreadsheets (red triangles on the corner of cells indicating further information).	To turn comments on, open **Tools | Options | View** tab. Ensure the box next to either **Comment indicator only** or **Comment & Indicator** is selected.
Macro security When I open the Microsoft Excel templates, the macro security dialog does not appear and my macro buttons don't work.	To enable the macro virus protection security levels: • In Microsoft Excel 97, open the **Tools | Options | General** tab. Ensure the box next to **macro virus protection** is checked. • In Microsoft Excel 2000 and XP, open the **Tools | Macro | Security** dialog box and select **Medium** and click **OK**. Thomson CPD checks all products for known viruses.

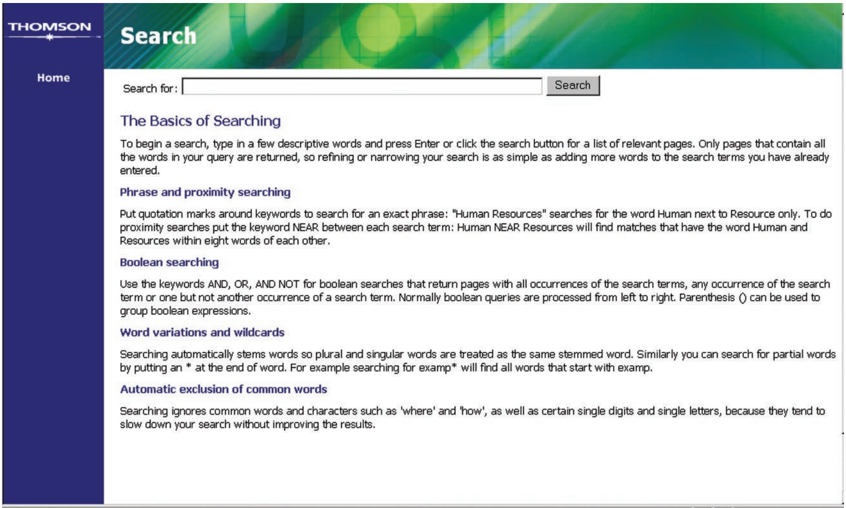
Problem	Solution
Internet Explorer	
HR Measurement Toolkit uses Microsoft Internet Explorer to display information. This product does not function through Netscape.	To download a free version of Internet Explorer, go to the Microsoft web site (www.microsoft.com) and navigate to the Downloads section. You will find the latest version available to download for free. Internet Explorer and Netscape can operate on the same PC easily. If you have any difficulties with their co-existence on your PC, please call Free Call 1800 036 186.

Searching

HR Measurement Toolkit has its own search engine built in. It automatically starts when you start your PC and is referred to as the HRMT Search Server in the **Start | Programs | Thomson CPD Business Tools** menu.

To initiate a search, click on the **Search** button on the main menu.

It will bring up the following screen:



Search words should be entered into the **Search for:** field.

To begin a search, type in a few descriptive words and press **Enter** or click the search button for a list of relevant pages. Only pages that contain all the words in your query are returned, so refining or narrowing your search is as simple as adding more words to the search terms you have already entered.

Phrase and proximity searching

Put quotation marks around keywords to search for an exact phrase: “Human Resources” searches for the word Human next to Resources only. To do proximity searches put the keyword NEAR between each search term: Human NEAR Resources will find matches that have the words Human and Resources within eight words of each other.

Boolean searching

Use the keywords AND, OR, AND NOT for Boolean searches that return pages with all occurences of the search terms, any occurence of the search term or one but not another occurence of a search term. Normally Boolean queries are processed from left to right. Parentheses () can be used to group Boolean expressions.

Word variations and wildcards

Searching automatically stems words so plural and singular words are treated as the same stemmed word. Similarly you can search for partial words by putting a * at the end of word. For example searching for examp* will for all words that start with examp.

Automatic exclusion of common words

Searching ignores common words and characters such as “where” and “how”, as well as certain single digits and single letters, because they tend to slow down your search without improving the results.

Customer support

Thomson CPD Helpline

Thomson CPD’s Customer Service Team will be pleased to assist you with any questions about installing or using *HR Measurement Toolkit*.

Phone **1300 304 197** Monday to Friday between 8.45 am and 5.30 pm Eastern Standard Time.

Thomson CPD would appreciate any feedback or suggested improvements for *HR Measurement Toolkit*. Please email any comments to <LRA.Support@thomson.com> or phone **1300 304 197**.