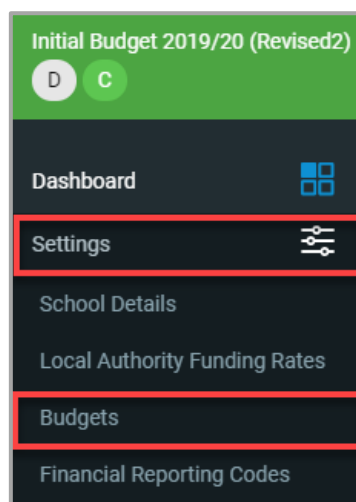## Create Staffing Scenarios

You can create staffing scenarios to view what impact a change in staffing contracts may have on your budget. This guide will explain how to create a number of different scenarios and how to run a report to compare the differences.

Copy your Existing Budget

The first step to create a staffing scenario is to create a copy of your existing budget to use as a template for the new staffing scenarios. This means you can assign any changes to the new budget without affecting your current budget.

1. Log in to IRIS Financial Planner in the usual way.

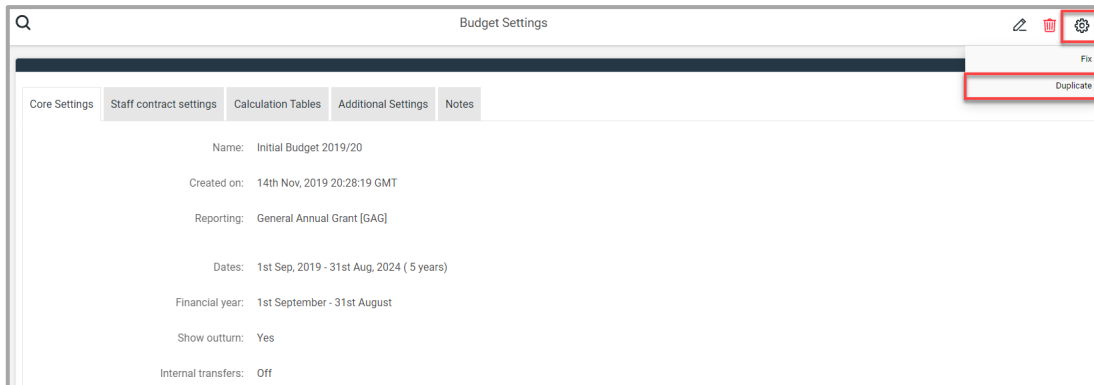2. Select **Settings** > **Budgets** from the sidebar menu.

3. The **Budgets** page is displayed. Select your current working budget.
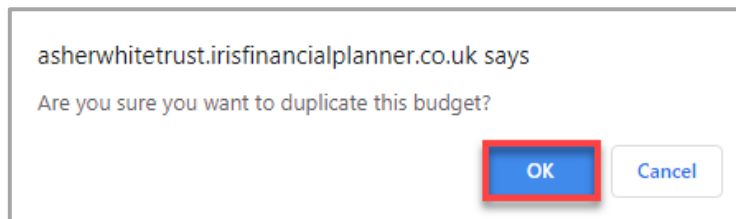
4. The **Budget Settings** page is displayed for your budget. Select the **Actions** icon, then select **Duplicate** from the drop-down menu.

5. A message displays asking you to confirm you are happy to duplicate the selected budget. Click the **OK** button.
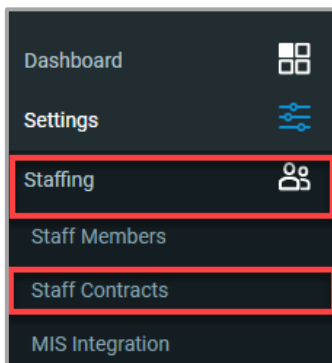

6. The **Edit Budget** page is displayed. Rename the budget to identify your new staff scenario using the Name field, then click the **Save** icon.
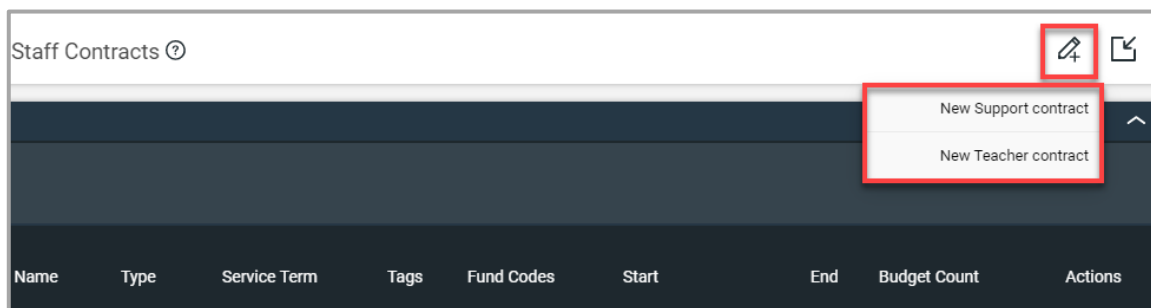
PS Financials
By IRIS
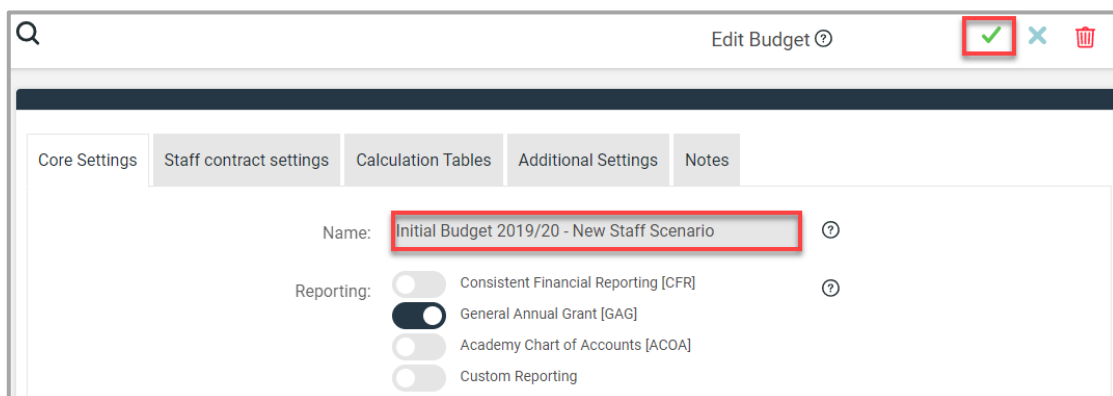
Creating a Staff Contract Scenario

You can create a staff contract to view the impact this will have on your budget.

1. Select **Staffing > Staff Contracts** from the sidebar menu.

2. The **Staff Contracts** page is displayed. Select the **Add New** icon, then select the applicable contract type from the pop-up menu.

3. The **New Staff Contract** page is displayed. It is recommended that you do not select a Staff member, but just enter a Contract name in the **Contract Name** field and complete the rest of the staff contract in the usual manner.
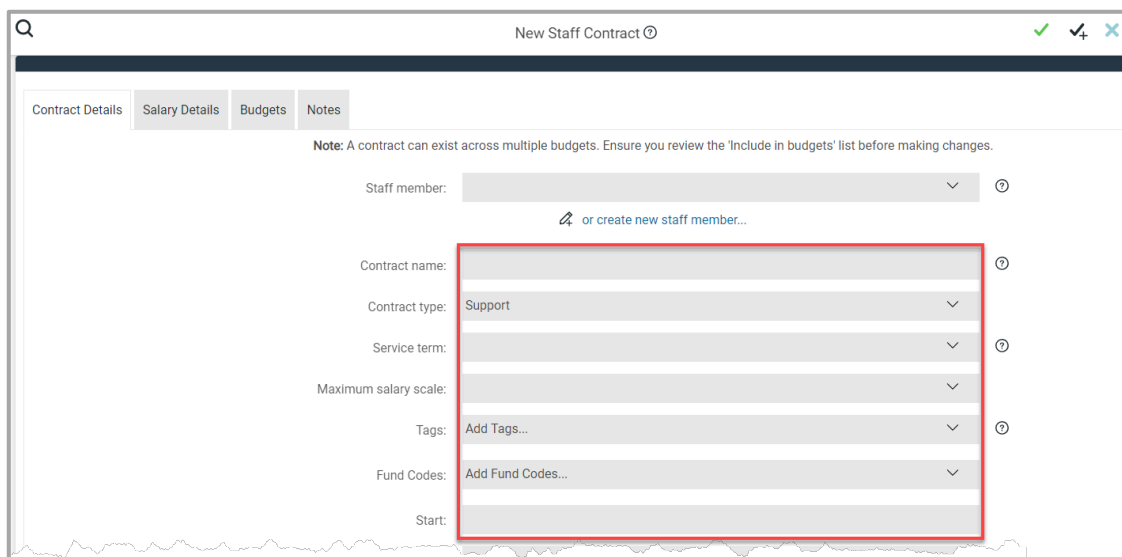
4. Select the **Salary Details** tab and complete the applicable information.


5. Select the **Budgets** tab. The new contract will be automatically included in all budget scenarios. Select the toggle switch adjacent to the applicable budget(s) to remove the contract from that budget then click the **Save** icon. Alternatively, click the **Save and Add** icon to add another contract.

Ending a Staff Contract Scenario

You can create a scenario where you can end a contract on a specific date.

1. Select **Staffing** > **Staff Contracts** from the sidebar menu.
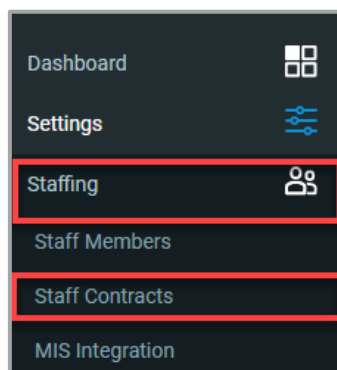
2. The **Staff Contracts** window is displayed. Select the applicable contract you want to end in a scenario.

	Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service
☐	✓	Contract 1				Support	TEST
☐	✓	Contract 1	112233	John	Smith	Support	TEST

Staff Contracts ⓘ

Actions | Filters | Hidden

3. The **View Contract** page is displayed. Select the **Settings** icon, then select **Duplicate** from the drop-down menu.

View Contract ⓘ

Duplicate
Salary statement

Details:

Staff member: Mr John Smith
Contract name: Contract 1
Service term: TEST - TEST

Type: Support
Contract start: 1st Sep, 2019
Maximum salary scale: 10
Continuous service date: 1st Aug, 2005

4. The **Edit Contract** page is displayed. Enter a contract name in the **Contract Name** field and select a contract end date in the **End** field using the calendar.

Contract Details | Salary Details | Budgets | Notes

Note: A contract can exist across multiple budgets. Ensure you review the 'Include in budgets' list before making change

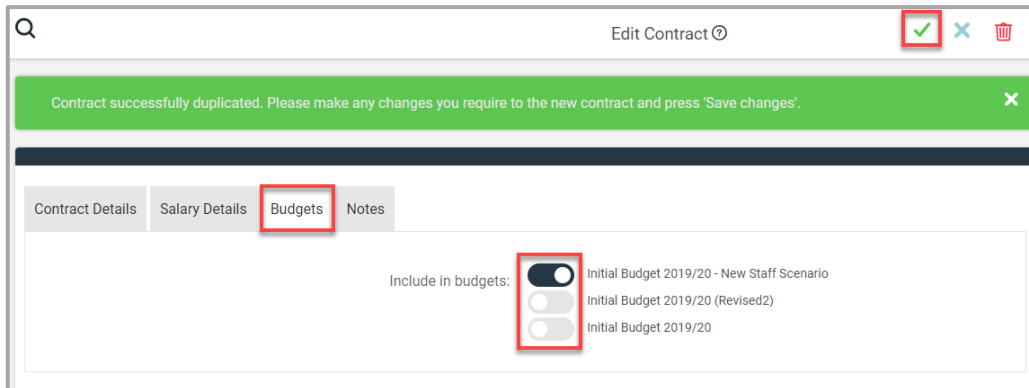| Staff member: | Smith, John - 112233 |
	✎ or create new staff member...
Contract name:	Contract End Scenario
Contract type:	Support
Service term:	TEST
Maximum salary scale:	10
Tags:	Add Tags...
Fund Codes:	Add Fund Codes...
Start:	2019-09-01
End:	

5. Select the **Budgets** tab and select the applicable toggle switch to apply the contract to a budget(s) and click the **Save** icon.


6. You now need to remove the original staff contract from the new scenario budget. Select **Staffing** > **Staff Contracts** from the sidebar menu.
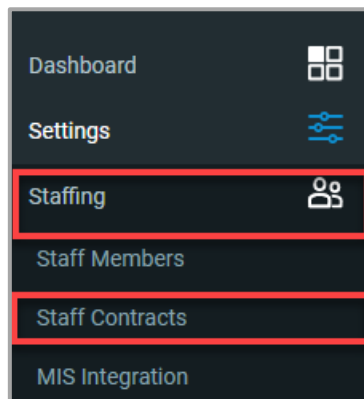
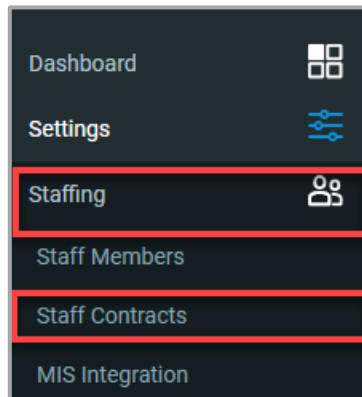7. The **Staff Contracts** page is displayed. Click the **Edit** link next to the applicable staff contract.
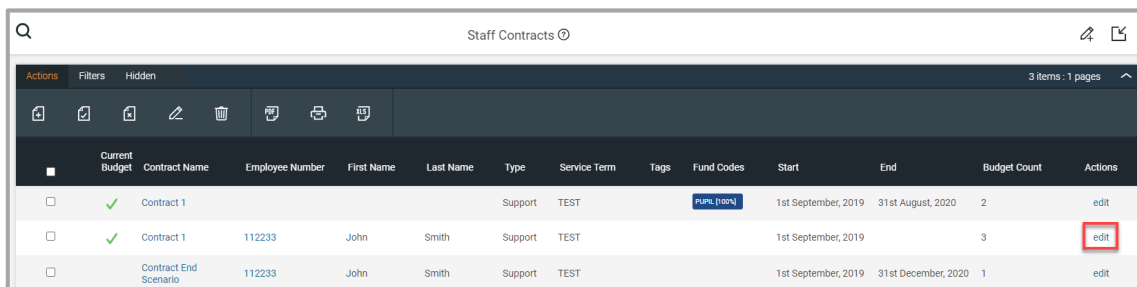
8. The **Edit Contract** page is displayed. Select the **Budgets** tab and use the toggle to remove the contract from the new staff scenario, then click the **Save** icon.
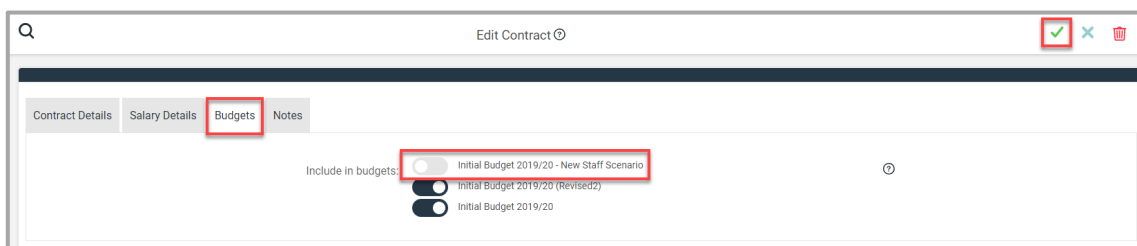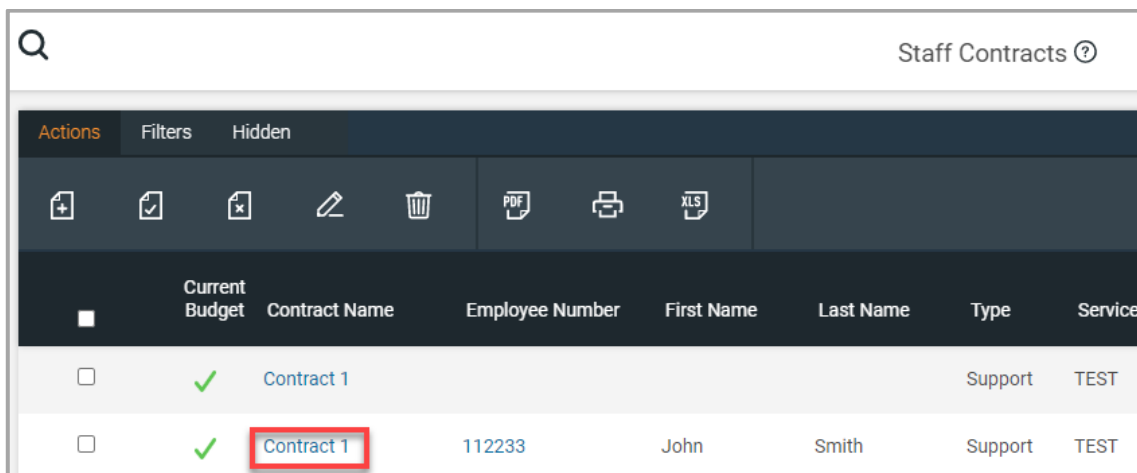
Changing Details of a Contract

You may want to edit a staff contract and compare this to an existing contract to assess the potential implications to your budget.

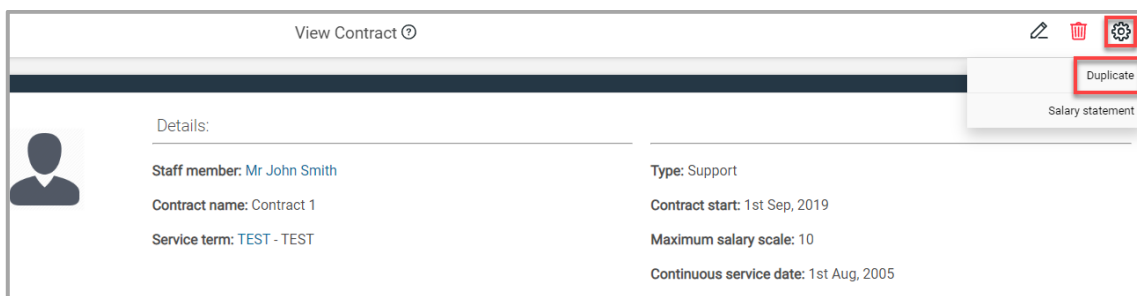1. Select **Staffing** > **Staff Contracts** from the sidebar menu.

2. The **Staff Contracts** window is displayed. Select the applicable staff member you want to use for your comparison.

3. The **View Contract** page is displayed. Select the **Settings** icon, then select **Duplicate** from the drop-down menu.

4. The **Edit Contract** page is displayed. Enter a new contract name in the **Contract Name** field and select the **Salary Details** tab.

5. The salary details for the selected contract is displayed. Click the **Add salary detail** icon and update the applicable salary details on the new line.

6. Select the **Budgets** tab and use the toggle to select/de-select the applicable budget scenarios. When you have finished, click the **Save** icon.
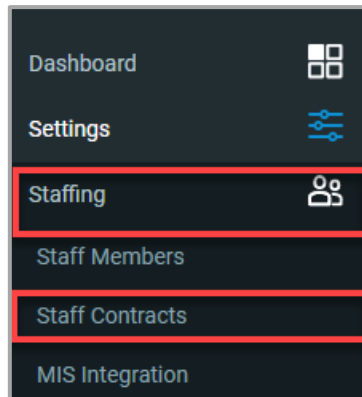
7. You now need to remove the original staff contract from the new scenario budget. Select **Staffing** > **Staff Contracts** from the sidebar menu.

8. The **Staff Contracts** page is displayed. Click the **Edit** link next to the applicable staff contract.

9. The **Edit Contract** page is displayed. Select the **Budgets** tab and use the toggle to remove the contract from the new staff scenario, then click the **Save** icon.

Comparing a Staffing Scenario with another Budget

When you have created your staffing scenario you can compare it with your current budget.

1. Select **Reporting** > **Budget Comparison** from the sidebar menu.

Note: The following example used in this guide is based on a school which receives GAG Funding. Your menu route may be titled differently based on your school funding type.

2. The **Budget Comparison** page is displayed. Your Current budget will always be the budget being compared with. Select an applicable budget to compare your current budget against from the drop-down list.
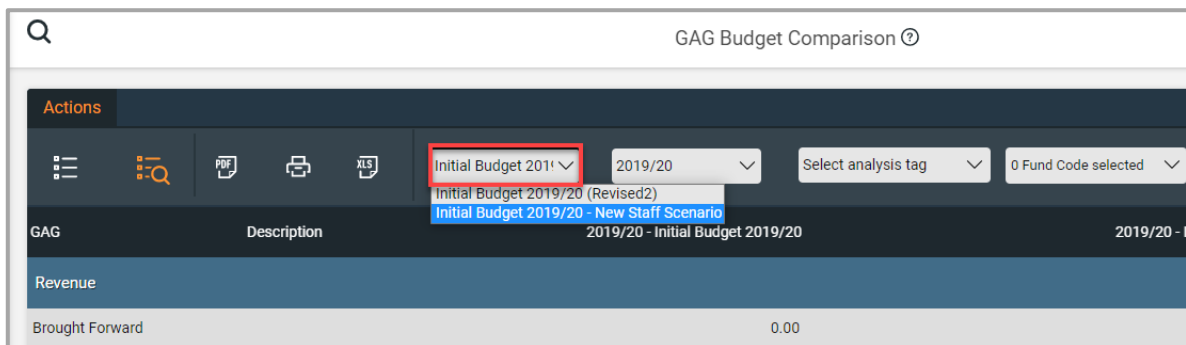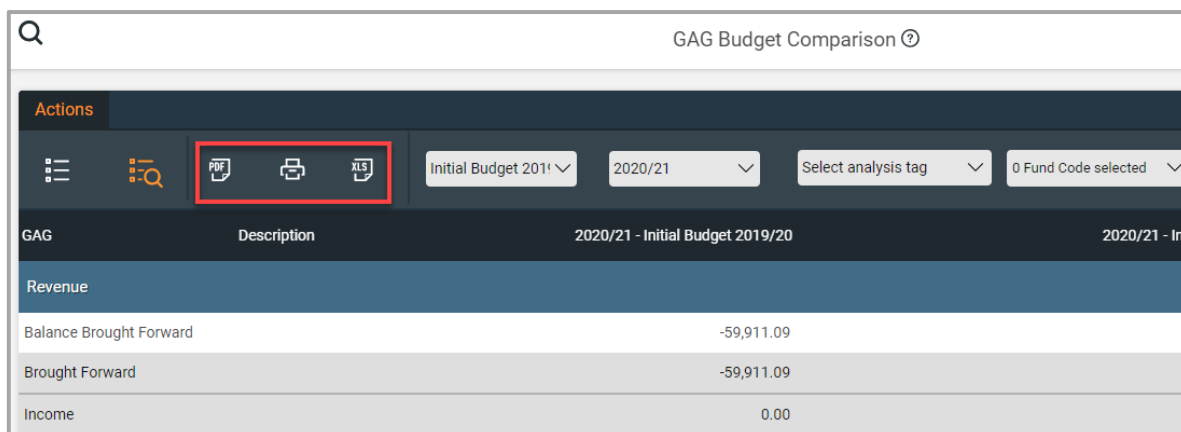

3. Use the other drop-down menus to select any applicable criteria for the report. Any differences will be visible in the **Variance** column.

4. You can export the report results using one of the applicable options on the report.

Where to Get More Help and Information

Our currently available documentation can be found at the following address:
https://psfinancials.zendesk.com/hc/en-us/categories/360000797219-User-Documentation

You can also utilise information on our Support Portal at the following address:
https://psfinancials.zendesk.com

Providing Feedback on our Documentation

If you have any feedback, comments or suggestions regarding our documentation, please email:

documentation@psfinancials.com

DOCUMENT REFERENCE	DESCRIPTION
AW-110820-CSS-IFP-1.0	Initial release