

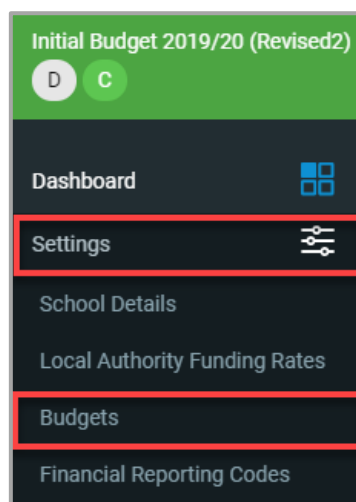
Create Staffing Scenarios

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.

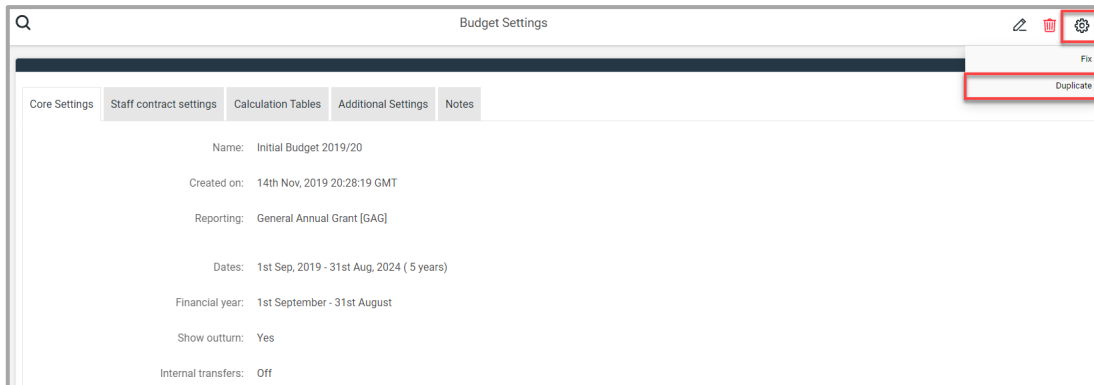


3. The **Budgets** page is displayed. Select your current working budget.

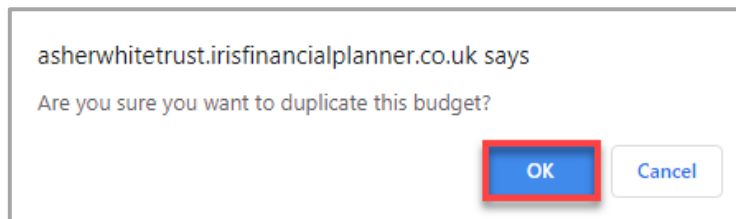
Actions			Filters	Hidden
Name	Start	End		
Initial Budget 2019/20 C D	1st September, 2019	31st August, 2024		
Initial Budget 2019/20 (Revised2)	1st September, 2019	31st August, 2024		



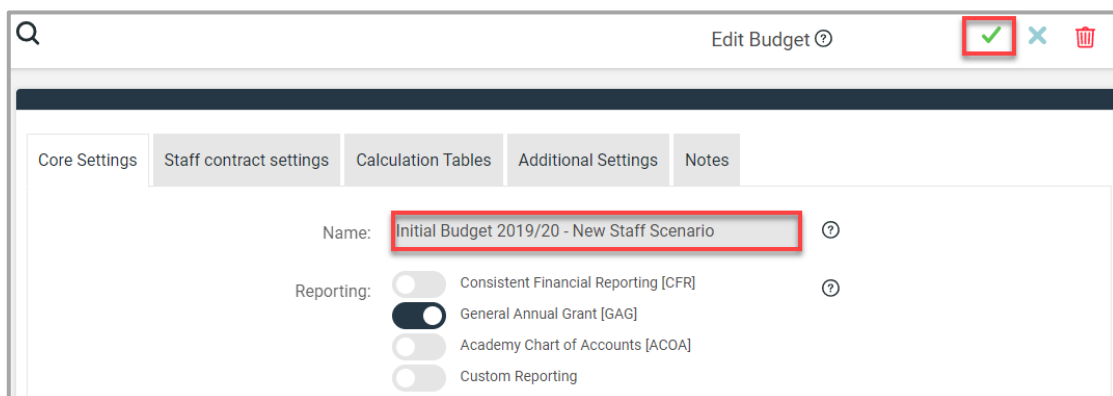
- The **Budget Settings** page is displayed for your budget. Select the **Actions** icon, then select **Duplicate** from the drop-down menu.



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



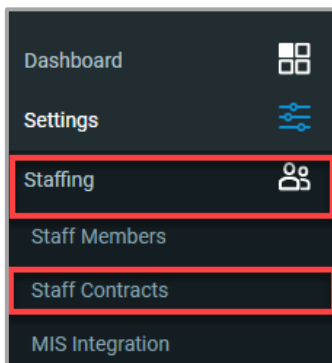
- The **Edit Budget** page is displayed. Rename the budget to identify your new staff scenario using the Name field, then click the **Save** icon.



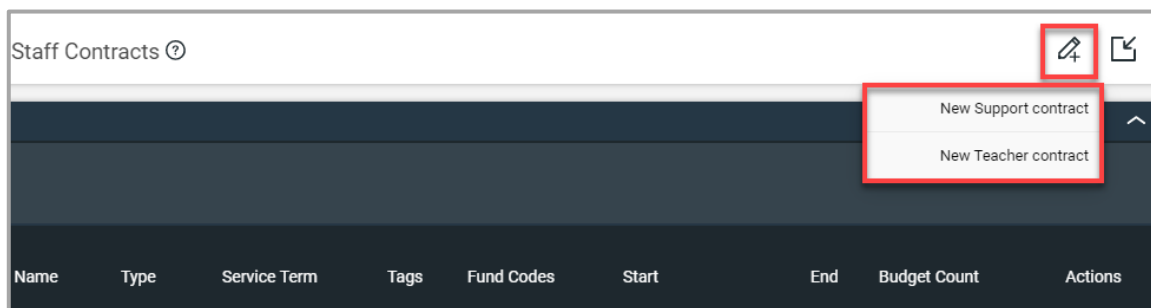
Creating a Staff Contract Scenario

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

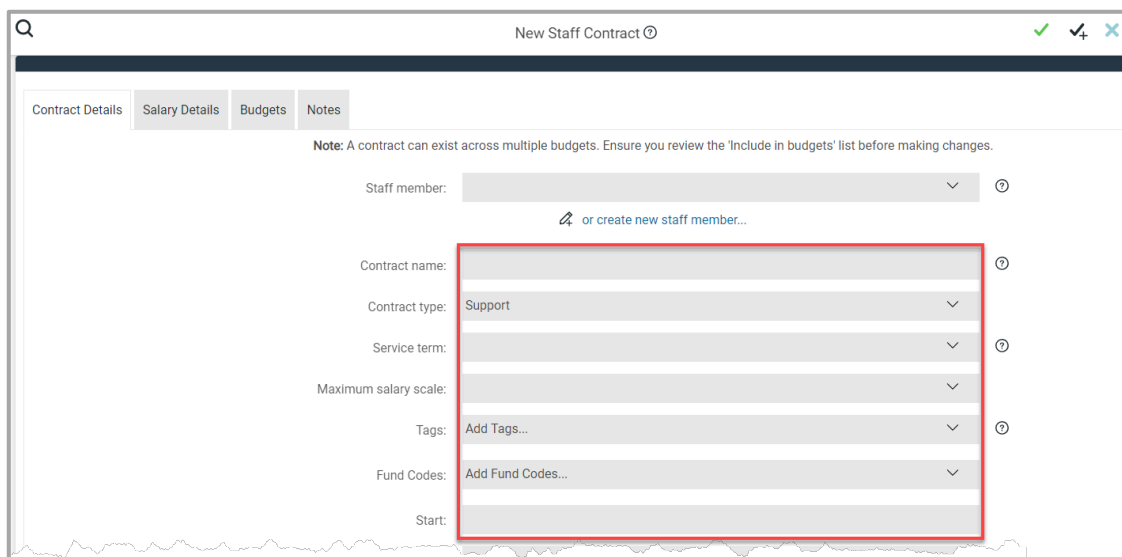
1. Select **Staffing > Staff Contracts** from the sidebar menu.



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.

The screenshot shows the 'New Staff Contract' form with the 'Salary Details' tab selected. The 'Salary adjustment' field is highlighted with a red box. The form includes fields for 'Start date', 'Salary scale', 'Salary adjustment', 'Allowances', 'Other payment', 'Super', 'Paid hours', 'Paid weeks', and 'Notes'. There are also buttons for 'Add salary detail' and 'Auto-increment salary details'.

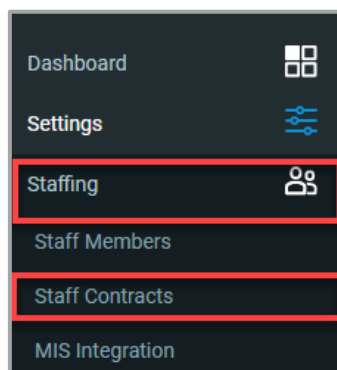
5. Select the **Budgets** tab. The new contract will be automatically included in all budget scenarios. Select the toggle switch adjacent to the applicable budget(s) to remove the contract from that budget then click the **Save** icon. Alternatively, click the **Save and Add** icon to add another contract.

The screenshot shows the 'New Staff Contract' form with the 'Budgets' tab selected. The 'Include in budgets' section is highlighted with a red box. It shows three budget scenarios with toggle switches: 'Initial Budget 2019/20 - New Staff Scenario' (checked), 'Initial Budget 2019/20 (Revised2)' (unchecked), and 'Initial Budget 2019/20' (unchecked). The 'Save' icon is also highlighted with a red box.

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.



- 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
<input type="checkbox"/>	Contract 1				Support	TEST
<input type="checkbox"/>	Contract 1	112233	John	Smith	Support	TEST

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

View Contract

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

Settings icon highlighted in top right. Dropdown menu shows 'Duplicate' and 'Salary statement' options.

- 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...

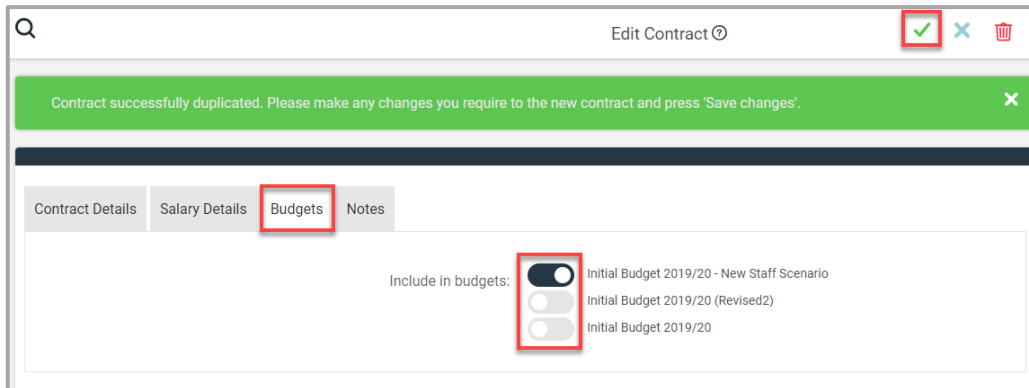
Fund Codes: Add Fund Codes...

Start: 2019-09-01

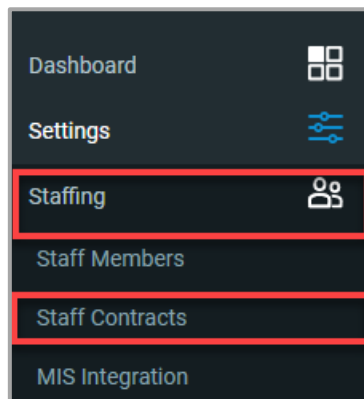
End:



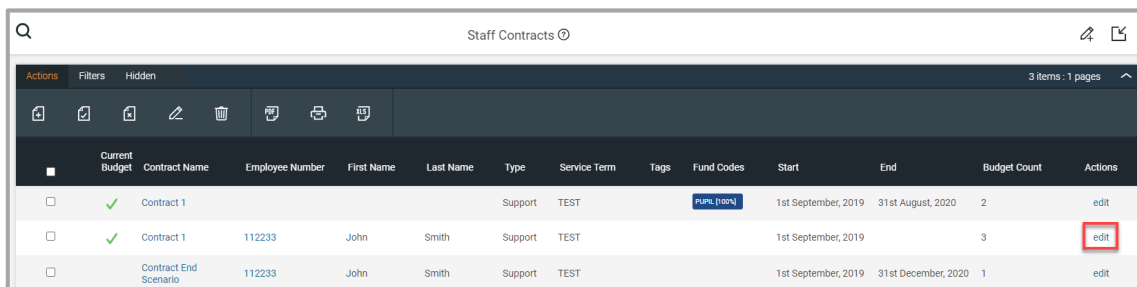
5. Select the **Budgets** tab and select the applicable toggle switch to apply the contract to a budget(s) and click the **Save** icon.



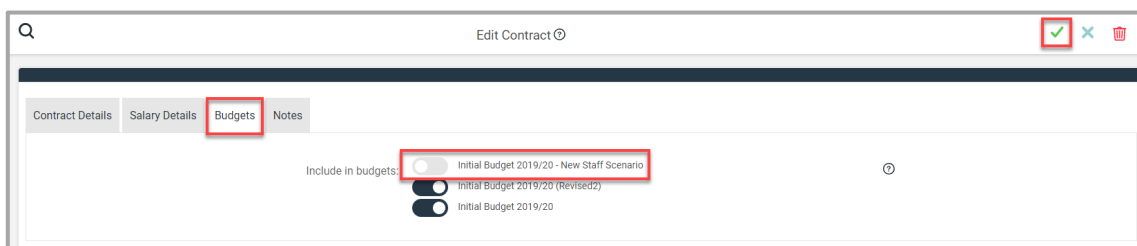
6. You now need to remove the original staff contract from the new scenario budget. Select **Staffing > Staff Contracts** from the sidebar menu.



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



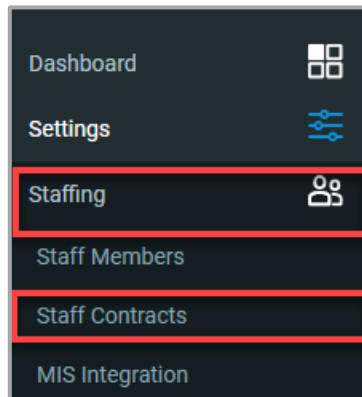
8. The **Edit Contract** page is displayed. Select the **Budgets** tab and use the toggle to remove the contract from the new staff scenario, then click the **Save** icon.



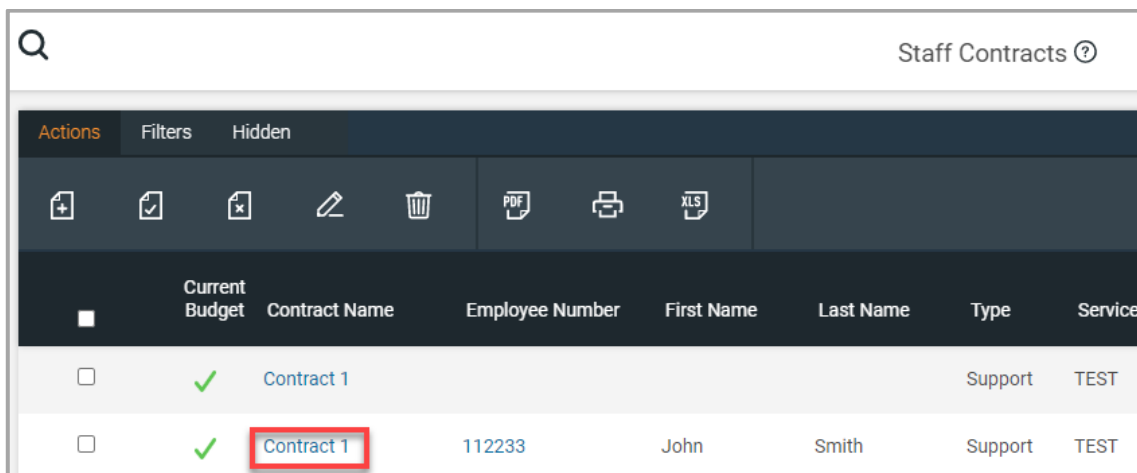
Changing Details of a Contract

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.



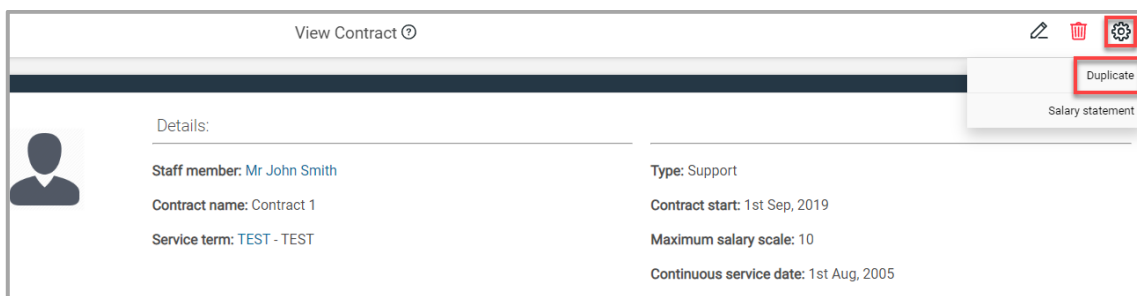
2. The **Staff Contracts** window is displayed. Select the applicable staff member you want to use for your comparison.



The screenshot shows a table titled 'Staff Contracts' with a search bar and filter tabs. The table has columns for Current Budget, Contract Name, Employee Number, First Name, Last Name, Type, and Service. The second row is highlighted with a red box.

	Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service
<input type="checkbox"/>	✓	Contract 1				Support	TEST
<input type="checkbox"/>	✓	Contract 1	112233	John	Smith	Support	TEST

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



The screenshot shows the 'View Contract' page for 'Mr John Smith'. It displays contract details and a settings menu. The 'Duplicate' option in the settings menu is highlighted with a red box.

View Contract

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

Settings menu: Duplicate (highlighted), Salary statement



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

Contract Details **Salary Details** Budgets Notes

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

Staff member: Smith, John - 112233

or create new staff member...

Contract name: **Contract 1 - New Staff Scenario**

Contract type: Support

Service term: TEST

- 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.

Contract Details Salary Details Budgets Notes

Add salary detail Auto-increment salary details

Start date	Salary scale	Salary adjustment	Allowances	Other payment	Super	Paid hours	Paid weeks	Notes
2019-09-01	9	0	Add Allowances...	0	<input type="checkbox"/>	30	52.1429	
TLR 1a 1x								
2025-04-01	7	0	Add Allowances...	0	<input type="checkbox"/>	30	52.1429	
TLR 1a 1x								

- Select the **Budgets** tab and use the toggle to select/de-select the applicable budget scenarios. When you have finished, click the **Save** icon.

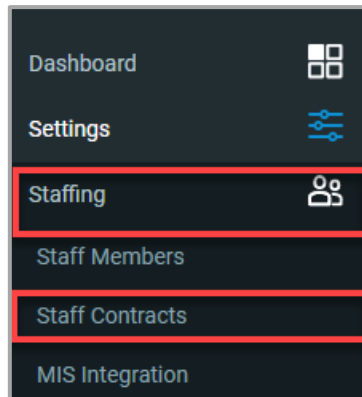
Contract Details Salary Details **Budgets** Notes

Include in budgets:

- Initial Budget 2019/20 - New Staff Scenario
- Initial Budget 2019/20 (Revised2)
- Initial Budget 2019/20

Save X

- You now need to remove the original staff contract from the new scenario budget. Select **Staffing** > **Staff Contracts** from the sidebar menu.



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

Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service Term	Tags	Fund Codes	Start	End	Budget Count	Actions
<input type="checkbox"/>	Contract 1				Support	TEST		PUPK (100%)	1st September, 2019	31st August, 2020	2	edit
<input type="checkbox"/>	Contract 1	112233	John	Smith	Support	TEST			1st September, 2019		3	edit
<input type="checkbox"/>	Contract End Scenario	112233	John	Smith	Support	TEST			1st September, 2019	31st December, 2020	1	edit

- 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.

The 'Edit Contract' page has tabs for 'Contract Details', 'Salary Details', 'Budgets', and 'Notes'. The 'Budgets' tab is active. Under 'Include in budgets:', there are three toggle switches. The first one, 'Initial Budget 2019/20 - New Staff Scenario', is turned off and highlighted with a red box. The other two are turned on.

Comparing a Staffing Scenario with another Budget

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

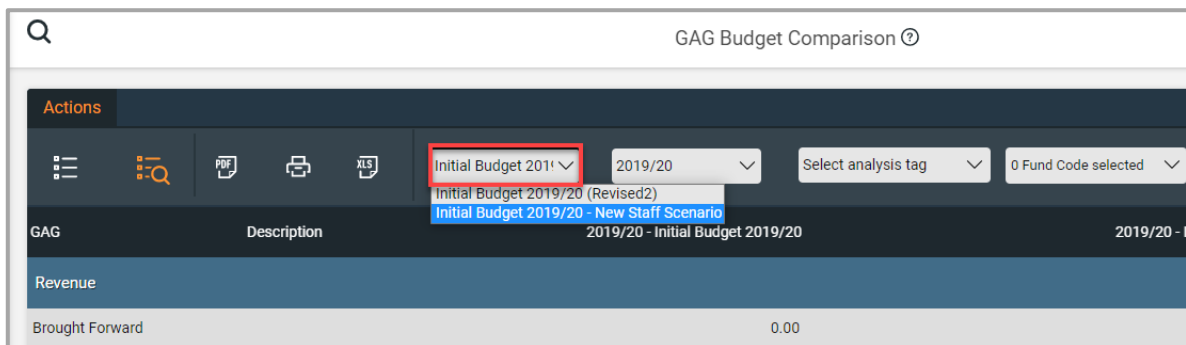
- Select **Reporting** > **Budget Comparison** from the sidebar menu.



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.



- 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.

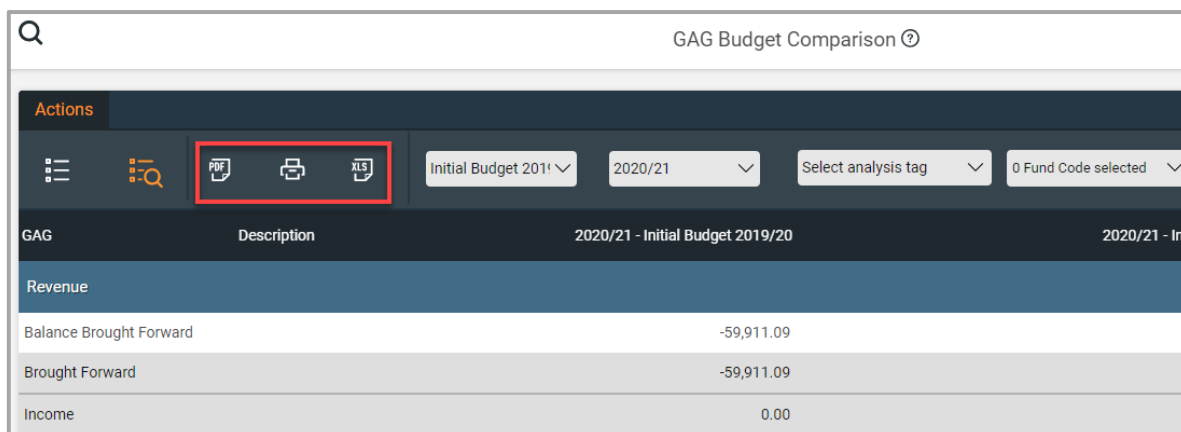


- Use the other drop-down menus to select any applicable criteria for the report. Any differences will be visible in the **Variance** column.

The screenshot shows the 'GAG Budget Comparison' interface with the 'Initial Budget 2019/20' dropdown selected. The table below shows a comparison between '2020/21 - Initial Budget 2019/20' and '2020/21 - Initial Budget 2019/20 - New Staff Scenario'. The 'Variance' column is highlighted with a red box, showing values of -26,218.21 for 'Balance Brought Forward' and 'Brought Forward', and 0.00 for 'Income'. The '% Var.' column shows 77.82% for the first two rows.

GAG	Description	2020/21 - Initial Budget 2019/20	2020/21 - Initial Budget 2019/20 - New Staff Scenario	Variance	% Var.
Revenue					
	Balance Brought Forward	-59,911.09	-33,692.88	-26,218.21	77.82%
	Brought Forward	-59,911.09	-33,692.88	-26,218.21	77.82%
	Income	0.00	0.00	0.00	

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



GAG	Description	2020/21 - Initial Budget 2019/20	2020/21 - Ini
Revenue			
	Balance Brought Forward	-59,911.09	
	Brought Forward	-59,911.09	
	Income	0.00	

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