



# PLANNED VS ACTUAL REPORT CHANGES 2018

## Changes to existing report

There are a range of changes that have been made to the Planned vs Actual report in line with the CAPS rollout. Firstly, the report received by the finance representative will include 2 worksheets. These are as follows:

**Planned v Actual Summary\_1** | Planned v Actual Detail\_2

Planned v Actual Summary\_1:

- 1 line per casual, per engagement.
- Includes limited engagement information.
- Excludes account code information.

Planned v Actual Detail\_2:

- Includes full details of the engagement
- Engagements with split project codes will only appear on the report once onboarding has been completed. They will initially appear as 100% against a project code.
- Removed multiple rows. A new row will only appear when there is a financial change, ie, account code change.

Other changes on the reports:

- Where time has been claimed which exceeds the original estimate on the offer, these will appear highlighted red in the reports.

Engagement					Engagement Sessions / Hours		
Name	Contract Num	Person ID	Rcd	HR Dept ID	Actual	Planned	Remaining
Brooks, Kelly	0006	2222222	4	7210	110	100	(10)

- Added Timesheet Validator and Onboarding columns.

Timesheet Validator	Onboarding
Staffy, Terry	Complete

- Planned will include ALL Engagements once accepted, even if onboarding is yet to be completed.
- Planned costs will only reflect the costs at time of the engagement start date, any pay rises after this date will only be reflected within the actuals.
- The report will only reflect CAPS engagement data. CASPA data will be stored separately on the final Planned vs Actual report which were produced for the pay period ending 3<sup>rd</sup> August. Therefore if a full 2018 report is required, manual merging of the CASPA and CAPS reports will need to occur.
- Any manual CASPA timesheets paid for any pay period from 17<sup>th</sup> August 2018 will not appear on either the CASPA or CAPS report.

## Ad-hoc Planned vs Actual Reports

There are also 3 reports available to run on an ad-hoc basis. These are:

Report Name	Details
<b>CAPS Casual Worked Time Planned vs Actual (Cost Centre)</b>  (this is the same as the report provided to the finance representatives via email on a fortnightly basis)	The purpose of this report is to show both summary and detailed view of casual engagements for a cost centre including engagement details, accounting distribution, planned vs actual comparison by hours/sessions and dollar value. This report will be used by financial administrators and casual coordinators to monitor casual costs.
<b>CAPS Casual Worked Time Actual (Pay Year/Calendar Group)</b>	This report displays actual figures following pay finalisation. Engagements, which span calendar years, will only be shown one calendar year at a time.
<b>CAPS Casual Worked Time Planned vs Actual (Course Level)</b>	This report is to show the total accumulative worked time by course where the engagement start or end date occurs within the selected year. This report includes information about Academic casual staff members only.

### Access to Ad-hoc reports

If you currently have access to run ad-hoc CASPA reports in BI Cognos, you will automatically be granted access to the above ad-hoc CAPS reports.

If not, please download and fill out the Access Request Form: [https://www.adelaide.edu.au/planning/data-warehouse/BI\\_access\\_request\\_form.docx](https://www.adelaide.edu.au/planning/data-warehouse/BI_access_request_form.docx)

The form needs to be signed by the Head of School or Director and include which area the Casual Coordinator is require access for.

The completed and signed form needs to be sent to the BI Team at [bi@adelaide.edu.au](mailto:bi@adelaide.edu.au).

The BI Cognos tool can be accessed: <https://bi.adelaide.edu.au/>

Guides on how to run the report can be found within the BI Cognos tool or on the HR Website.

Casual Coordinators are now able to request access to run these ad-hoc reports. Their access will also need to be approved by the head of School or Director.