The People and Position Planning Process ...

The new People and Position Planning Process will be used for the first time during the 2019 Budget cycle.

It represents:

- a transition to a higher level more value add approach
- a new Tool and new staff cube to improve user experience and planning efficiency
- improvements to pre-population of PiMs data, streamlining data entry and provides a more stable planning system

Each of the Team Leads in MR&A, Research Finance and Finance Business Partners look forward to receiving feedback to help prioritise future changes to this Tool.
What is changing?

1. The People and Position Planning Tool has replaced the HR Budget Tool
2. A position will be created based on PiMs employee data including percentage allocation. This supports a gradual transition to Position based planning
3. Planning user roles will be distinguished by security access to ensure roles match process accountability and responsibility
4. The People Planning Tool will provide new functionality to plan Position by Project and any chart field combination available in NSF Financials
5. Planning period will extend to 4 years and additional years will be visible in the cube view
6. Scenario Planning will also be available to support analysis required for Faculty and Divisional strategic alignment

Each of these changes will be outlined further in this document
People Planning Process Flow

- Assumptions

PiMs → Data extract

People Planning Process

- Edit existing positions
- Add: Casuals, Contractors, Vacant positions

Discuss FBP

Control Reports

Fix or accept exceptions in PPP

Multipurpose Reports

Finance Cube (every 15 mins for category BUDGET)

Present to School / Centre / Business Unit

School / Centre / Business Unit approve

Update access to read only a week before budget finalisation

Revex

Changes YES

Changes : NO
Before you begin

- Calumo performs best in Google Chrome or Mozilla Firefox (Internet Explorer will perform much slower)
- When you log in do a quick check of your access by going to APPS, Security and clicking on MR&A Budget and Forecast Access (see "Maintaining Access" for more information on access levels)
How to Access

To access the People Planning Tool log into Calumo

1. Go to the Apps menu and
2. click on People Planning
In order to access the People Planning Tool you must already have access to Calumo, the Staff cube and the entity you wish to look at.

If a user has Write Access to a position's Home Department then Access is granted to the Position Input report (screen).

If a user has Write Access to an Entity which this position has been allocated to, access is granted. This type of access is set by an asynchronous task which executes every 15-minutes. Consequently there may be a short window where a position's cost is allocated to an entity but a user with write access to that entity is denied. This trade-off allows for faster processing in the bulk of data input events.

User with Read-Only Access to People Planning Tool Entities can see all cost for all positions allocated to that entity, but are not able to change data.

MR&A Security access (not related to the roles above) can administer other users access (i.e., change from input to read only if they want to close down editing).

Use the Check my security App to see what people have access to.

MR&A Security access (not related to the roles above) can administer other users access (i.e., change from input to read only if they want to close down editing).

User with Read-Only Access to People Planning Tool Entities can see all cost for all positions allocated to that entity, but are not able to change data.
Maintaining Access (MR&A Staff)

In order to give or remove people's access to the People Planning Tool:

1. Go to the Apps Menu
2. Click on Security
3. Select MR&A Budget and Forecast Access
   (Double click on the name to change to another user)

In the HR column use the drop down list to assign the access for that person

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read Only Access</td>
<td>Can view the information only</td>
</tr>
<tr>
<td>PP Data Entry</td>
<td>Can enter data in the Input menu but not do adjustments</td>
</tr>
<tr>
<td>PP Data Entry with Adj.</td>
<td>Can enter data in the Input menu and also do adjustments</td>
</tr>
<tr>
<td>PP Admin</td>
<td>Can enter in the Admin menu and also do all of the above</td>
</tr>
</tbody>
</table>

**Note:** Access can be different between entities, a person can have read access to one entity while having data entry access to another.

How do you know who has access to maintain other people’s access to the tool:

1. Go to the Apps Menu
2. Click on Security
3. Click on What's my Security
4. Scroll to the right
5. Look at the MR&A Admin section
6. Yes = this person has access to maintain the access of others (in the HR section to the left)

The person who's access you want to maintain must already have access to Calumo and the Entity. If they don't they will need to apply for it prior to you doing this maintenance.
The People and Position Planning Tool focuses on positions (not employees)

The seeded data will assign one person per position.

PiMs data will be populated for –

- Permanent and fixed term full time employees
- Permanent and fixed term part time employees

You can assign more than one person to a position (eg job sharing)

Employee Categories from PiMs that are Included in the Tool

**Academic**

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>CONT FT Academic</td>
</tr>
<tr>
<td>12</td>
<td>Fix FT Aca Convertible Tenure</td>
</tr>
<tr>
<td>13</td>
<td>Fix FT Academic</td>
</tr>
<tr>
<td>16</td>
<td>Fix FT Academic Nomination</td>
</tr>
<tr>
<td>21</td>
<td>CONT Frac Academic</td>
</tr>
<tr>
<td>22</td>
<td>Fix Frac Aca ConvertibleTenure</td>
</tr>
<tr>
<td>23</td>
<td>Fix Fractional Academic</td>
</tr>
<tr>
<td>26</td>
<td>Fix Fractional Academic Nom</td>
</tr>
</tbody>
</table>

**Professional**

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>61</td>
<td>CONT FT Professional</td>
</tr>
<tr>
<td>63</td>
<td>Fix FT Professional</td>
</tr>
<tr>
<td>66</td>
<td>Fix FT Professional Nomination</td>
</tr>
<tr>
<td>71</td>
<td>CONT PT Professional</td>
</tr>
<tr>
<td>73</td>
<td>Fix PT Professional</td>
</tr>
<tr>
<td>76</td>
<td>Fix PT Professional Nomination</td>
</tr>
</tbody>
</table>
Casuals and Contractors

- Generally a **casual** will complete a timesheet and is paid either from PiMs or by an agency. Costs associated with Staff paid through the agency are captured by UNSW on receipt of the invoice from the agency and paid via Accounts payable.

- **Contractors** are generally paid by invoicing UNSW and paid via Accounts Payable.

- Initial population from PiMs excludes these categories – see list to the right.

- The People Planning Tool will include a blank input screen from which to plan these people costs regardless of whether they are Casual or Contractors (non-employees).

- Use the **Employee Plan Comparison** cube view to see a list of all Casuals and Contractors that exist in PiMs.

- When planning for Casuals, please remember not all oncosts apply.

- When planning for Contractors in this Tool, they will be coded to **non-people costs**. These costs will be locked down within the REVEX template to avoid over-writing.

- Person of Interest (“POI”) are captured in PiMs to meet either compliance requirements or to meet indemnity requirements. While such individuals are authorised to participate in UNSW paid outside work opportunities there will not be any payroll costs associated with such positions.

- See Slide “**Contractor Input**” for information on how to enter Agency staff.

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### Employee Categories from PiMs that are Excluded from being assigned a position in the initial seeding

#### Academic

<table>
<thead>
<tr>
<th>Code</th>
<th>Category</th>
<th>Excluded</th>
</tr>
</thead>
<tbody>
<tr>
<td>41</td>
<td>CAS Academic</td>
<td></td>
</tr>
<tr>
<td>45</td>
<td>CAS Guest Lecturer *</td>
<td></td>
</tr>
<tr>
<td>46</td>
<td>CAS Examination Supervisor *</td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>CAS Examiner *</td>
<td></td>
</tr>
<tr>
<td>48</td>
<td>CAS Practicum Supervisor *</td>
<td></td>
</tr>
</tbody>
</table>

* No longer active

#### Professional

<table>
<thead>
<tr>
<th>Code</th>
<th>Category</th>
<th>Excluded</th>
</tr>
</thead>
<tbody>
<tr>
<td>81</td>
<td>CAS Professional</td>
<td></td>
</tr>
</tbody>
</table>

#### Other

<table>
<thead>
<tr>
<th>Code</th>
<th>Category</th>
<th>Excluded</th>
</tr>
</thead>
<tbody>
<tr>
<td>42</td>
<td>POI Academic Visitor *</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>POI Adjunct Appointment *</td>
<td></td>
</tr>
<tr>
<td>44</td>
<td>POI Conjoint Appointment *</td>
<td></td>
</tr>
<tr>
<td>49</td>
<td>Miscellaneous</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Scholarships</td>
<td></td>
</tr>
<tr>
<td>91</td>
<td>Retiree - Professional Pension</td>
<td></td>
</tr>
<tr>
<td>99</td>
<td>Other Campus Relationship</td>
<td></td>
</tr>
</tbody>
</table>

* POI - Person of Interest
FTE Calculation for Casuals

**Academic staff:**

FTE hours are based on the table below. Units claimed are converted to hours worked.

Standard hours from JOB are used. If standard hours in JOB are zero, then 35 hours are assumed.

Standard work days per month are as per budget assumptions for the year.

Eligibility group is CASACAD.

Calculation: \[ FTE = \frac{\text{Units converted to hours as per table}}{(\text{standard hours}/5 \text{ working days} \times \text{number of working days in a month})} \]

Example:

<table>
<thead>
<tr>
<th>Earning Name</th>
<th>Units worked</th>
<th>Hours worked</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAY LECT SIG</td>
<td>12</td>
<td>48</td>
</tr>
<tr>
<td>PAY TUTPHD</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>PAY TUTPHDRP</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>PAY DEMO PHD</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

\[ FTE = \frac{68}{(35/5 \times 20)} = .4857 \]

**Professional staff:**

FTE hours are based on the hours in earnings code PAY CASUALHR only. Overtime and other hours are not included in FTE calculation.

Standard hours from JOB are used. If standard hours in JOB are zero, then 35 hours are assumed.

Standard work days per month are as per budget assumptions for the year.

Eligibility group is CASPROF.

Calculation: \[ FTE = \frac{\text{Hours from PAY CASUALHR}}{(\text{standard hours}/5 \text{ working days} \times \text{number of working days in a month})} \]

Example:

\[ FTE = \frac{42}{(35/5 \times 21)} = .2857 \]

\[ FTE = \frac{16}{(38/5 \times 20)} = .1053 \]

Note: some staff work a 38 hour week
1. **Entities**  
Select your entity here and it will flow through to all the reports in the Dashboard

2. **Category**  
Select the category you’ll be using

3. **Admin**  
Where the tool administrators can set calendars, casual rates, do account mapping etc

4. **Business Assumptions**  
View Casual Rates, EBA Rates, Leave drivers, etc

5. **Input**  
This is where you will enter casual and contractor costs and add or edit a position

6. **Cube Views**  
Where you can view the Staff Pay Forecast and the Payroll Summary Forecast

7. **Reports**  
There are several budget and control reports available
• This is where the tool administrators (Budget Admin Staff) do the account mapping, set the casual rates, enter the leave drivers, set the monthly calendar and administer the on-cost drivers

• These are used throughout the tool and generally do not change once set

• These settings are for use through the entire scenario

• Only Budget Admin staff can access the Admin menu

• Use the Security menu to check what access you, or others, have to the tool
• Only Budget Admin staff can access the Admin menu
• [Click here](#) for a list of GL Account Codes
• This table should not require much change as these relationships are mostly static

Use GL account codes to map different employee types and/or expense codes

Edit the combinations that are there (they are existing in the cube)

If new combinations need to be added they should be approved by Group MRA
Admin Casual Rates

Enter the rates for your casual employees

- Edit rates (double click a field on the page)
- Delete Press the Garbage Can icon on the line to delete
- Save your work
- Cancel out of the screen
- Export to Excel

Only Budget Admin staff can access the Admin menu
• View the EBA rates
Admin Leave Taken Drivers

- Leave drivers are sourced from historical leave patterns in PiMs
- Budget Admin staff can change the leave drivers by month and employee category group and allocate by %
- If new combinations need to be added they should be approved by Marie Saparamadu

Only Budget Admin staff can access the Admin menu

- **Save** your work
- **Cancel** out of the screen
- **Export** to Excel
- **Double click** to edit
- **Click on the garbage can icon next to the row to delete**
Admin staff can enter the number of working days and pay periods per month as well as by year.

- Edit the lines that are already there by double clicking.
- Use the add button to add additional months.

Add new Months
- Year
- Working Days
- Pay Periods

Save your work
Cancel out of the screen
Export to Excel
Double click to edit
Click on the garbage can icon next to the row to delete

Only Budget Admin staff can access the Admin menu.
Admin On-Cost Drivers

- Edit the drivers (sourced from the cube)
- If new on-costs need to be added they should be approved by Marie Saparamadu, Manager Budget and Management Reporting & Analysis - Group

- Double click to edit
- Save your work
- Cancel out of the screen
- Export to Excel
- Click on the garbage can icon next to the row to delete

Only Budget Admin staff can access the Admin menu
Allowance Drivers

• Manage the allowance drivers
Business Assumptions

- **Account Map**
  Check what Account Codes Expense Types are mapped to

- **Casual Rates**
  Check the hourly rates for casuals

- **EBA Rates**
  Check the EBA rates for a grade and/or step by month

- **Leave Drivers**
  Check the leave drivers by Employee Category Group and Allocation %

- **Monthly Payday Drivers**
  Check the pay periods, working days and months

- **Oncost Drivers**
  Check the oncost drivers by Employee Category

- **Payroll Tax**
  Check the Payroll tax by period by state
The Input menu is where all the costs are entered

- Casuals can be entered as hours or dollars
- Contractors are entered as the cost per month
- Position is where employees can be added to position, add a new position or make a position inactive.

Casual workers and Contractor data are not brought in from PiMs (although their zid’s are)
Casual Employee Hours Input

- Enter your casual positions here
- If you have edit access the blue cells are where you input your data
- Use the filter to include or exclude on-cost values in the report:
  - When Including on-costs, the report expects to consume a value on the salary input lines that would include all on-costs associated with a casual staff member.
  - When excluding on-cost, the report operates as usual.
  - Both will split the on-cost into the appropriate Expense Type and Account dimension members according to the mapping tables.
  - The initial default is set to exclude, but it will remember the user’s last session and reuse the same setting next time.

Note! All casuals and contractors go to people costs. If this shouldn’t happen the mapping needs to be changed in the admin menu.

- Can be entered as hours or salaried
- Categories are from PIMs
- Pre Populate the casual employee input based on last years rate
- Rates from the Admin Casual Hours section are used here
- Can be entered for a five year period
Contractors Input

1. Choose your category (Budget)
2. Choose your entity
3. Add your contractors

• You can create your contractor positions here
  (using the actual cost of the contractor)

OR

• Attach them to a position as an incumbent
  (using the allowance section to increase or decrease their cost to actual)

(You should not do both as you would be double budgeting)
The position menu is where all the positions are managed

- Positions for employees are created when seeded from PiMs
- Positions for contractors may need to be added
Landing page for the positions within an entity

**Category:** Use the Category Scenario BUDGET

**Entity:** Use the member explorer to choose your entity

**Position List:** Lists the position in the entity, click on the edit button to edit the position.

Use the filter icons in the headings to filter/sort
Adding a position

1. Click on Add a New Position
2. Enter the details for the position
3. Click on Add a New Position

When creating a new position the correct salary admin plan needs to be selected for the type of position and employee category you are creating (refer to the EBA report to ensure the plan, award category and grade are appropriate for the employee)
When you click on Edit next to a position you are taken to the Position Entry screen. This is made up of:

1. Position
2. Incumbent Employee
3. Annual Cost
4. 4 Year Expense Trend
5. Comments
6. Award/Salary rate
7. Cost allocation
8. Allowances
9. Bonus payments
10. Adjust Calculated Expense

(In these materials these 8 are split across the next several pages but appear on one page in the Tool)

Important to Note:

Positions will be created in Calumo as part of the data load process and will be based on existing employee data in PiMs (i.e., the positions from PiMs won’t be used for this budget cycle as Position Management wasn’t available in PiMs at the time that the tool was being developed). PiMs positions will be used in the next budget cycle.

The People Planning Tool allows planning:

1. for more than one FTE per position
2. for people when project has not yet been created – create position called ‘Contingency’
• These are the details of the position and employee who occupied the position at the time the information was interfaced in from PIMs.

• When assigning people to positions it’s particularly important to note the grade and salary plan as these could change significantly when a person is moved from one position to another.
The person who currently occupies this position will initially be displayed here. You can then add or delete as required.

- Add or remove people from this position
- Using the From and To dates you can effective date when people leave and start the role
- If the role is a shared one you can use the Allocation section to manage that

**Note** when using cross entity employees please ensure you advise your counterpart in the other entity.

*For information on Contractors being attached to positions please refer to the Contractor Input section.*
- A summary of the HR costs for the current position
- Initially they will show the employee as interfaced from PiMs but will change as you edit the position
- When you hit save on any box the whole page will refresh (including these costs)
- Click on the Jump to Calculation Detail link to view more information on these figures
Expense Trend out to 2025
Comments

Enter any comments that are relevant to this role

- Comments are a free text field
Award / Salary Rate

1. **From**: Date to be effective from
2. **To**: Date to be effective until
3. **Grade**: The grade of the employee
4. **FTE**: Full Time Equivalent
5. **Super rate**: Rate of superannuation
6. **TRP Annual Salary**: Annual salary

- Delete lines by clicking on the garbage bin icon next to the line
- Add new lines by clicking on the Add button

*(Excludes any bonus data)*
For the allocation of funds for the position
(where they will be charged to)

This can be charged across one, or many chartfields, by entering a line for each allocation

Notes:
There are currently no controls in place to ensure that FTE is 100% allocated
The tool will allow over or under allocation
Exception report is available to monitor this allocation

1. From: When the cost allocation will start
2. To: When the cost allocation will end
3. Entity: Department/organisation
4. Fund: The fund (in the chartfield)
5. Project: The project id where the cost will be charged
6. Allocation %: In the cases of job shares or people who fill multiple part time positions costs can be allocated across chartfields by percentage
Allowances

1. **Allowance:** What allowance does this position get
2. **From:** When does the allowance start
3. **To:** When does the allowance end
4. **Amount:** The monthly amount for the allowance (select the allowance and dates and the amount will populate)

- Allowances are brought in from PiMs
- Lines can be deleted if not required and new ones added
Bonus Payments

- Bonus payments are not brought in from PiMs.
- Bonuses should be budgeted to be paid in April.
- Lines can be deleted if not required and new ones added.

To budget at a higher level:
- Create a position called “Bonus” in the entity and manage it that way.
- Has to be a salary position – make it a TRP position so that you can put a dollar value in the bonus that is not associated with a grade.

1. **Pay Date:** Bonuses are paid in April each year.
2. **Bonus:** How much is the bonus.
3. **Save**

**Important**
Bonus Payments are attached to a Position. If you move an employee from one position to another the bonus will not follow them, it will stay in the position. If you insert someone else into the position they will be eligible for the bonus if you do not move or remove it.
Adjust Calculated Expense

- Position Expense by year and month and remuneration type
- Use the Year dropdown list at the top of the page to select the year
- Enter into the blue cells to make adjustments

Tip! Highlight a range of cells, right-click to spread an amount across the highlighted cells (to reduce data entry) - there are various options in how you could spread the costs

Role 1 and 2 access cannot enter adjustments
Cube views are similar to reports, however you can manipulate them as they allow you to bring in more information if you need to by dragging the fields into the report.

Cube views are identified with the green (many squares) icon.

Please view the reporting handbook for more information on views and cubes.
1. Budget Expense Type Detail (multi purpose report)
2. Budget Detail Forecast by Year
3. Budget Detail Breakdown by Expense Type
4. Payroll Summary Casuals
Control Reports

1. **Employees with no positions**
   Provides a list of any employees that are not attached to a position

2. **Employees in more than one position**
   Provides a list of employees who are in more than one position – including employment relationships

3. **Employees in more than one position**
   Provides a list of employees who are in more than one position – excluding employment relationships

4. **Inactive Positions**

5. **Positions with no employees**
   Provides a list of positions that do not have an employee attached to it

Control Reports are provided

You will only see information on the entity you have access to. This means if you run the **Employees in more than one position** report and your employee is attached to a position within your entity as well as to a position in another entity, you will only see the position in your entity.
Why do we use People Planning Scenarios...

- Scenarios (or Categories) are available within the tool with each Scenario including a copy of the original PiMs extract.
- Finance Business Partners will collaborate with Team Leads and Analysts from MR&A and Research Finance to edit the People Plans.
- Scenario planning is available however for the purposes of the 2019 Budget process it is recommended only Scenario 1, “Budget”, is used to reflect People Plans.
Scenarios

• **Budget** is the default scenario (category) that is loaded at the end or the process.

• You may wish to use the other scenarios for a variety of reasons however only the Budget Scenario is the only scenario loaded.
Go into the position you want to duplicate and click on the copy link to the top right of the page.
Reset back to a point in time

If you have played around with a position and want to reset it back to what it was when the data was seeded from PiMs you can click on the reset button and it will reset back to what is in the top left box called Position.

You can reset the position back to any point in time when it was saved – the bottom entry is to save it back to the original record in PiMs, if this is the only entry in the list that means the record has not been saved before.

Important! When reset back to a point in time it’s important to note if you have moved the incumbent employee to another position, setting this position will not remove them from that position but it will reinstate them in this position. This will leave you with the employee in two positions.
Transfers & Secondments

To transfer someone from one position to another

• add the employee as incumbent in the new position
• delete that employee as incumbent from the original position

Transferring a position from one department to another department within same entity

• requires completion of fields for the allocation area of the position

When transferring between entities

• add the employee as incumbent in the new position
• delete the employee as incumbent from the original position

Secondments are similar

• the employee has an end date in one position in an entity with a gap for the time of the secondment and another row effective when they will return to that position
• the employee will be added to a position they are seconded to for the duration of their gap

Important! When transferring people from one position to another it is important to take note of the level / grade of each position as you might inadvertently transfer someone from a level 6 to level 9, which would incur significantly different salaries
Leaves of absence

Positions should be created for employees for the duration of absence

Example:

• When Maternity leave is taken - create a “maternity leave” position. This will allow the salary costs to be coded to central division and on-costs to be coded to the cost allocation(s) in the position

• Five people on maternity leave require five maternity leave positions with applicable grades and cost allocations for each employee

Similarly for Study Leave

• Create a position with the applicable rules for the employee while they are on study leave

If the employee is on a leave of absence they should be removed from their position and placed into a leave of absence position. Generally all leave of absence positions would be different and each position should be filled by the employee on the leave of absence (i.e., not have multiple Incumbent employees)

Types of leaves of Absence

• Long Service Leave
• Personal Leave
• Carer’s Leave
• Compassionate Leave
• Domestic Violence Leave
• Parental Leave
• Special Leave
• Observation of Holy Days and Essential Religious or Cultural Duties
• Jury Leave and Witness Leave
• Defence Forces Leave
• Study and Examination Leave
• Special Studies Program
For budget planning, if an employee is scheduled to be on parental leave, the process will be:

- In your entity add a new position – Parental leave NNN
- Attach the employee to the position as an incumbent for Parental Leave period
- Enter the Award / Salary rate for the relevant Parental Leave period
- Cost Allocation - to ACACCOUN OP001 PS20677 for the Parental Leave period

Any backfill of the primary position will need an incumbent to be assigned in order for the cost to be budgeted against the home cost centre.
This is the project Description used by the People Planning Tool (notice the description tab).

This is not the project Description used by the People Planning Tool (notice the description tab).
Organisational Tree, Account Tree and Fund tree

- Structures (account, entity and fund) will not be updated in Calumo after 1st June
- If any of these trees need to be updated in Calumo the request to do so must be sent to Marie Saparamadu, Manager Budget and Management Reporting & Analysis – Group, for approval
- Changes will only be approved if critical for the financial plan process

From the 1st of June changes cannot be made to the structure between divisions and faculties, however changes can be made to the structure within a faculty of division
Managed by MRA by changing the Access of the Tool users to Read Only whilst the Plan version is reviewed – teams can have this access changed at different times prior to UNSW version finalisation
Need Help?

**QuickLinks**

- People Planning FAQs
- Calumo
- List of Finance Contacts
- Calumo FAQs

**Finance Guidance**

We would be very happy to receive your feedback on this booklet. Please contact us.

fti@unsw.edu.au

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Google Chrome or Mozilla Firefox are the preferred browsers (as java script is slower in Internet Explorer)

To improve performance set your calculation to manual (particularly when using files with Macros)

Mac users need to use Citrix for Excel reports (but not for web based reports – these can be used as per normal on a Mac)