July 2019 CCW Updates

The University of Otago CCW has been updated with some new functionality. Below is a summary of the main changes.

The CCW is located here:

https://www.otago.ac.nz/research/forms/1_COSTINGS_CONSENTS_CCW/UoO%20CCW.xlsm

Research & Enterprise strongly recommends you save the link in your preferred browser and/or save a shortcut to your desktop. Every time you start a new CCW, if you follow the link you will always have the most up to date version.

Summary Sheet

Selecting Department from the drop-down list automatically populates the Division and the Department's cost code (circled in red, used by Finance 1):

Department:	Accountancy & Finance	DB	Division:	Commerce

Budget Start and *Actual Start* dates: The Actual Start (which will be put into Finance 1) may be different from the Budget Start for several reasons; for example, if there is a delay in approval from the funder. The Actual Start is assumed to be the Budget Start unless you manually change the latter.

Budget Start:	01 Jul 2019	End Date:	
Actual Start:	01 Jul 2019	Actual End:	

FOR (Field of Research) and SEO (Socio-Economic Objectives) code boxes are highlighted until filled in:

FOR Codes	%

SEO codes	%

There are also some additional optional information boxes:

Does this CCW apply to an:	Application	○
	Contract	○

Sighted by Finance	☐

To assist the administration team, the comments section now has a date column. If you have entered a comment, but have forgotten to enter the date when the comment was entered, Excel will highlight the date cell (*Hint: Ctrl + ; will insert today's date into a cell*):

Date	Comments (*Please date any new comments*)
28 Jun 2019	Comment 1
	Comment 2

The Indirect Staff and Direct Staff Sheets

The biggest change is salary projections are now embedded into the Excel sheet:

Name	1a				Dept:	1b			
Status	3		**Super**	Uni	**TA**			**O/H**	Full
Salary Group ▼	**Progressed? ▶**	☐ 8	☐	☐	☐	☐			**Year 1 =**
2	**1 (2020)** 4	2	3	4	5	6			
Grade	5								
Salary	6			9					**Totals**
FTE	7								0.00
Salary cost	$0	$0	$0	$0	$0	$0			$0
Super	$0	$0	$0	$0	$0	$0			$0
ACC	$0	$0	$0	$0	$0	$0			$0
Overheads	$0	$0	$0	$0	$0	$0			$0
TOTALS	$0	$0	$0	$0	$0	$0			$0

1a 1b   Enter your name and department as usual.

2   Choose your Salary Group from the drop-down list, default is '*Academic*', otherwise choose Medical/Dental, Research Assistant, Nursing or Professional Level 1 to 8 ('Professional' is the new name for 'General' staff).

3   The Status cell will auto-populate based on your inputs into the Direct or Indirect staff sheets and your choice of Salary Group; this cell can also be manually overridden.

4   The initial year is automatically selected based on the start date from the Summary Sheet. Projects starting between 1 January to 30 June use the current year's salary projections as year 1; projects starting on or after 1 July use the next year's projections as year 1.

5   Select the appropriate Grade from the drop-down list. Available grades will depend on selected Salary Group.

6   Salary will auto-populate based on grade and year.

7   Enter FTE for each year.

8   If the staff member is projected to be progressed (e.g. ARF04 to ARF05) in any particular year, click the tick box to progress the grade up one.

9   Cell shading is calculated on the start and end date on the Summary Sheet. If no end date entered, the cell shading defaults to 3 years.
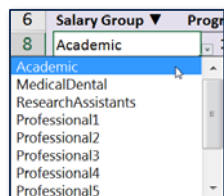
Additional Notes for Staff Sheets

- Excel assumes that staff will stay in their current band for all years of the CCW, but a staff member's band can be changed for each year in the grade column.

  — For example, a staff member may be listed as Associate Professor (AP05) for the first 2 years and projected to be promoted to Professor (PF01) in year 3. PF01 can be selected as the grade for year 3 and will continue until end of project.

- All the grade and salary cells are unlocked (including shaded cells). They can be overwritten with non-standard salary codes or values.

  — If you enter a grade that isn't in the standard salary projections, the progressed check box (❽) may not work or may return an error. Therefore, if you enter a grade that isn't in the standard salary projections, all grades and salaries will need to be entered manually for each year.

- Salary grades can also be typed in (must match a grade from the salary projections for auto-population of salary to work).

- Super, TA (Teaching Allowance), and O/H (Overheads) can be changed as normal.
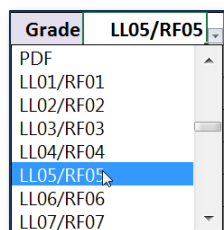
Examples

Lecturer level 5 (code: LL05) projected to progress in year 2		Professional Level 6, Step 13, progressing in year 2	
Select 'Academic' from Salary Group drop-down		Select 'Professional6' from Salary Group drop-down	
Select LL05 from Grade drop-down *Lecturers share salary values with Research Fellows (RF05)*		Select PL6 13 from Grade drop-down *PL6 13 = Professional Level 6, Step 13*	
Click 'Progressed' box for year 2 *Grade for year 2 has updated to LL06*		Click 'Progressed' box for year 2 *Grade for year 2 has updated to PL6 17 as there are no steps 14-16 in Level 6*	
Insert FTE for each year		Insert FTE for each year	
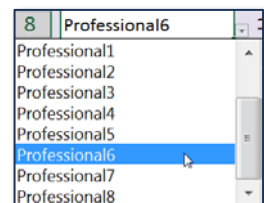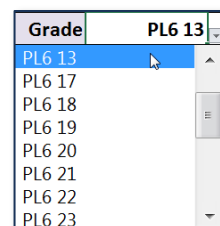
Indirect Salary Recovery Relief Agreement (ISR)

- This will auto-populate when Indirect Staff are entered on the Indirect Staff sheet. Select required staff member from drop down list to populate agreement section.

- There are 3 Print buttons available:

  — Print only currently selected staff member;

  — Print all staff members; and

  — Print ISR summary table.

Multi-Dept Split

- This sheet is now completely automatic. Once staff from a minimum of 2 different departments are entered into the staff sheets, this sheet will auto-populate and only requires printing.

SUB Coversheet & MOU info Sheets

- These two sheets operate similarly. Select required subcontract from the drop-down list, then click "Generate Currently Selected SUB Coversheet" or "Generate Currently Selected MOU Sheet".

  — Your selection will create a new Excel sheet for the selected subcontractor. Comments and other subcontractor specific information can then be entered/changed.

Printing Sheet

- The print areas are now dynamic for staff sheets. For example, if there are 2 Indirect Staff, Excel will print only those 2 staff.

- There is now a "Print All Active Sheets" button. This button will print all sheets that have content. For example, if no direct staff and/or no equipment has been budgeted, those sheets won't print.