Salary Planner Instructions

Step 1 - Log into Faculty/Staff Portal and select <u>Lynx Self Service</u>

Step 2 – Select <u>Employee</u> tab

Step 3 – Select <u>Salary Planner</u>

Step 4 – Select <u>Edit Scenario</u>

Step 5 –
Select the ID for the current budget year
Select <u>WORKING</u> for Scenario

Select By Position Attributes

Step 6 – Click on <u>Select</u>

Position Filters

Step 7 –
Select the Department/Level (use the 3-digit organization to work with entire organization at once)

FY08SPBUD, WORKING

Organizations:

900 - Main College Organization Number
9010 - Main Department Organization Number
90100 - Specific Department Organization Number

Include Subordinate Organizations: ☑

Employee Class:

All
CF - Classified Full Time
CP - Classified Part Time

Step 8 – Select Employee Class (Ctrl + Left Mouse Click to select more than one class)

Bargaining Unit:

All
None

Faculty Rank:

All
None

Ok to leave all other settings at the defaults as listed on this example

Include Pooled Positions: ☑

Include Vacant Positions: ☑

Number of Records per Page: 25

| List by Employee | Summary Totals | List by Position |

Step 9 – Click on List by Employee

List By Employee

Mass Change

Rounding: None

Step 10 – Make sure Rounding is set to None

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
General Increase			Yes
Merit Increase			Yes
Equity Increase			Yes
Other Increase			Yes

Use this section to apply a raise to all employees that you selected (*either* percent *or* amount for each of one or more categories listed). You can later modify this on an employee by employee basis.

| Mass Apply |

Jump to Bottom

20211 Admissions Office, Unlocked

ID and Name	Position, Suffix and Title	Employee Totals Appointment Salary Percent	Department Totals Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Exclude from Totals
W00007169	C99960 - 00 Secretary II	100								
W00007061	C99789 - 00	100.00 18,194.00	100.00	100.00	18,194.00	.00	.00	18,194.00	No	

Step 11 – Click on the name of the first employee on the list

Employee Detail

Mass Change
Rounding: None
Hourly or Salary: Both

Reason	Percent	Amount	Include
General Increase			Yes
Merit Increase			Yes
Equity Increase			Yes
Other Increase			Yes

Mass Apply

Apply increase amounts on Job Detail screen

Employee
Name and ID: W00007169
Home Organization: Adm

Step 12 – Click on Job Detail link

Extracted Jobs

Position Suffix and Title	Organization	Base Appointment Percent	Proposed Appointment Percent	Base Salary	General Increase Percent	General Increase Amount	Merit Increase Percent	Merit Increase Amount	Proposed Salary	Links	Exclude from Totals
C99960 00 Secretary II		100.00	100.00	19,087.0	.00	.00	.00	.00	19,087.0	Job Detail Distribution Comments Position Detail	☐
								.00	19,087.00		

Job Detail

Employee
Name and ID: Person's Name W09090900
Home Organization: Org Name and Number

Employee Name and "Home" Organization (Department) show here.

Mass Change
Rounding: None

Step 13 – Make sure Rounding is set to None

Reason	Percent	Amount	Include in Change Totals
General Increase	3.50	668.050000	Yes
Merit Increase			Yes
Equity Increase			Yes
Other Increase			Yes

Apply

Step 14 – Fill in and/or change raise amounts (*either* percent *or* amount for each of one or more categories listed)

Step 15 – Click on Apply

* - indicates a r

Job Detail for Position and Suffix C99960 - 00

	Proposed	Base	Current
Model:			
Effective Date:	Jul 01, 2007	Jul 01, 2006	Jul 01, 2006
Title:	Secretary II	Secretary II	Secretary II
Hourly Rate: *	9.497255	9.176089	9.176089
Annual Salary: *	19,755.05	19,087.00	19,087.00
Total Change Percent:	3.50		
Total Change Amount:	668.05		
Appointment Percent: *	100.00	100.00	100.00
FTE: *	1	1	1
Hours per Day: *	8.00	8.00	8.00
Hours per Pay: *	86.67	86.67	86.67
Salary Group:	2008	2007	2007
Table: *	CL		
Grade: *	14		
Step: *	0		
Budget Factor: *	100.00		
Estimated Fiscal Year Budget: *	19,755.05		
Exclude from Totals:	☐		

Raise summary will show here

Base Job
Begin Date: Sep 20, 2004
End Date:
Job Status: Active
Salary Type: Salary

Even though this program allows you to change FTE, grade, etc., you must also submit a PAR. Please note that the title listed on this screen is not the person's official title; instead it is the payroll category assigned to the person. If it is incorrect, let the Payroll Office know.

Job Detail *continued*

Annual Salary: ✱	20213.85	19,430.92	19,430.92
Total Change Percent:	4.03		
Total Change Amount:	782.93		
Appointment Percent: ✱	100.00	100.00	100.00
FTE: ✱	1	1	1
Hours per Day: ✱	8.00	8.00	8.00
Hours per Pay: ✱	86.67	86.67	86.67
Salary Group:	2008	2007	2007
Table: ✱	CL	CL	CL
Grade: ✱	14	14	14
Step: ✱	0	0	0
Budget Factor: ✱	100.00		
Estimated Fiscal Year Budget: ✱	20213.85		
Exclude from Totals:	☐		

Base Job

Begin Date:	Oct 14, 2003
End Date:	
Job Status:	Active
Salary Type:	Salary
Rank:	
Tenure Status:	
EPAF Transaction #:	

[Save] [Reset] [Previous] [Next]

Step 16 –
Select Distribution to change how an employee's salary is distributed across different indexes or accounts. *(see next page)* You can also add comments for Budget, HR or Payroll. *(see page 6)*

Distribution | Default Hours | Position Detail | Comments

Step 17 – Click on <u>Save</u>

Step 18 – Click on <u>Next</u>

Distribution | Default Hours | Position Detail | Comments

Job Labor Distribution

ℹ️ Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

Distribution

Name and ID:

Position-Suffix and Title: C99653-00 Clerk

EPAF Transaction #:

Current

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
W 214315	120100	20200	61841	510						100.00	13,646.00
									Total	100.00	13,646.00

Proposed

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
W 214315	120100	20200	61841	510						100.00	13,646.00
									Total	100.00	13,646.00

a)

Add a new record

Use this section to change distribution

Proposed Position Distribution

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
W	120100	20200	61841	510						100.00	13,646.00
									Total	100.00	13,646.00

If you don't wish to make changes, just click on the Job Detail link at the bottom to return to previous screen

COA: W

c) Default from Index

Index: 215030 b)

Fund: 120100

Organization: 20000

Account: 61841 d)

Program: 610

Activity:

Location:

Project:

Cost Type:

Percent: 50.00 e)

Amount: 6823.00

f) Save   Remove

a) Before you add a new record (additional FOAP), first note the account the person is paid from.
b) To add a new FOAP, input the Index.
c) Click on Default from Index button.
d) Input the account you noted as instructed above.
e) Type in the appropriate percent *or* amount to pay from this new FOAP.
f) Click on Save button.

Important!
Correct the Percent amounts so they total 100.

❌ Proposed Job Budget Distribution percent does not total 100.

Proposed

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
W 214315	120100	20200	61841	510						100.00	13,646.00
W 215030	120100	20000	61841	610						50.00	6,823.00
									Total	150.00	20,469.00

This button not necessary

~~Copy Position Distribution to Job~~   Copy Job Distribution to Position

Employee Detail | Job Detail

When done editing distribution and verifying that the total percent = 100, click on the button Copy Job Distribution to Position and then click on Job Detail.

Distribution | Default Hours | Position Detail | Comments

Job Comments

Name and ID:	~~W00 59~~
Position-Suffix and Title:	C99960-00 Secretary II
Last Updated by:	Betty J Kusnierz
Last Updated on:	Feb 27, 2007
Comments:	This person changed from .5 FTE to .75 FTE. PAR processed with effective date of 5/1/07.

a) Type in appropriate comments.
b) Click on the <u>Save</u> button.
c) Click on <u>Job Detail</u>.

[Save] [Reset]

Employee Detail | Job Detail

Job Detail   *continued*

Step 17 –
Refer to Job Detail instructions on pages 3 through 6 to input increase amounts and other changes for each employee in your selection.

When you are on the last employee, you will no longer have a <u>Next</u> button.

After you're done with the last employee in your selection, select the <u>List by Employee</u> link at the bottom of the screen.

Distribution | Default Hours | Position Detail | Comments
List By Employee | List By Position | Employee Detail | Position Filter | Employee Filter | Summary Totals

List By Employee

Use the List by Employee screen to check and review the overall change amount and proposed salary for each employee on the list.

Please note that only 25 records show at once, so click on the

Next 25   button

near the bottom of the page, if there is one, for the next 25 employees.

Step 18: When done with this set of employees, at the bottom of the screen click on List by Position.

List By Position | Summary Totals
Employee Filter | Position Filter

Step 19: The List by Position screen will show your open positions and allow you to change the amount budgeted in each. <u>First</u>, at the bottom of the screen click on:

Copy Estimated Budget to Budget

to copy the Estimated Budget to the Proposed Budget (which will then fill in the Change Percent and Change Amount). Your open positions will then be easily identified because the Proposed Budget will be 0. For each of your open positions modify the Change Amount to adjust the Proposed Budget accordingly.

You can check the Exclude from Totals box on your open positions so the change amount(s) are not included in the change amount totals at the bottom of the screen.

As you could do with individual employees, you can also edit the distribution between different FOAPs and also add comments for each position. Important: Before you select either, be sure to click on the <u>Save</u> button at the bottom of the screen to save any Change Amounts you have added.

If you select distribution, you change it the same way as instructed on page 5; ***however***, after making your changes and verifying that the total percent = 100, click on the Update Budget button and then on the List by Position link.

This button not necessary

List By Position

Step 20: After verifying all positions (and budgeting open positions appropriately), click on Save.

To continue with another set of employees, click on Position Filter (and return to Step 7 of these instructions on page 2).

Final Step 1 - Checking for Updates:

As PARs are processed during the salary input "window," the data in salary planner will be updated. Before the salary input window closes, complete the following steps:

1) Under Position Filter select the highest org level listed (3-digit org).
2) At the bottom of the Position Filter Screen, click on List by Employee.
3) On the employee list look for any employees where the Extract Status column says "New" or "Changed."

ID and Name	Position, Suffix and Title	Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded from Totals
		Employee Totals		**Department Totals**							
W000029 C99591 - 00 Clerk		100.00	16,147.13	100.00	100.00	16,147.13	3.24	522.94	16,670.07		No
W 5 4 C99570 -		100.00	15,000.00	100.00	100.00	15,000.00	3.01	451.00	15,451.00		No

4) For those employees that show an Extract Status of "New" or "Changed" repeat steps 11 through 17 on pages 2-6 to check/update change amounts and proposed salary.

Final Step 2 – Listing All Positions:

a) Go to the Position Filter screen and <u>uncheck</u> Include Vacant Positions

Include Vacant Positions:	☐

b) Select the highest org level listed (3-digit College org)

c) At the bottom of the Position Filter screen, click on <u>List by Position</u>
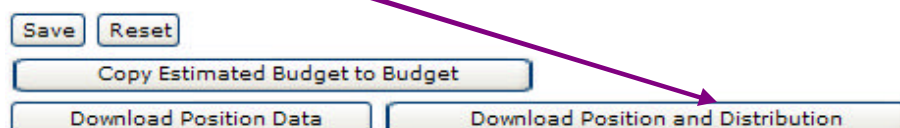
d) At the bottom of the List by Position screen click on
[Copy Estimated Budget to Budget] and then click on [Save]

e) Return to the Position Filter (click on link at bottom of screen)

f) Re-check Include Vacant Positions

Include Vacant Positions:	☑

g) Select the highest org level listed (3-digit College org)

h) At the bottom of the Position Filter screen, click on <u>List by Position</u>

i) At the bottom of the List by Position screen, click on Download Position and Distribtuion

[Save] [Reset]

[Copy Estimated Budget to Budget]

[Download Position Data] [Download Position and Distribution]

<u>Return to Top</u>

List By Employee | Summary Totals
Employee Filter | Position Filter

Note: In order for Download Position and Distribution to work, in Internet Explorer, Internet Options, Security, you need to have enabled File Download and Automatic Prompting for File Download. In addition, you need to have pop-ups allowed for *.weber.edu.

✓ When prompted as follows:
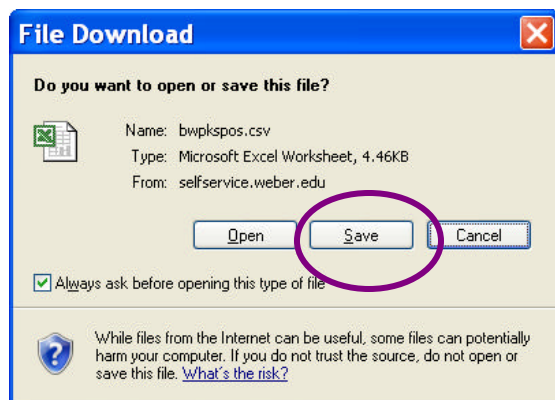
Select Save and then select Desktop as the location.
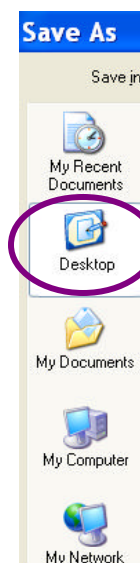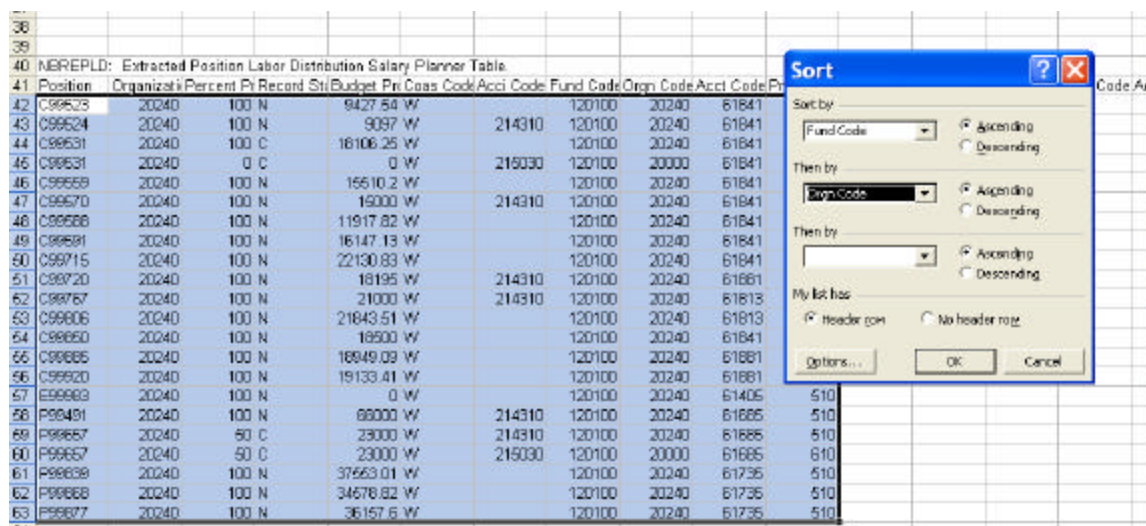
Final Step 3 -
Using Excel to Total Downloaded Position and Distribution Information

1) Open Excel
2) Open bwpkspos file. Please note that you need to "Look in" your Desktop and change the "Files of type" to be All Files
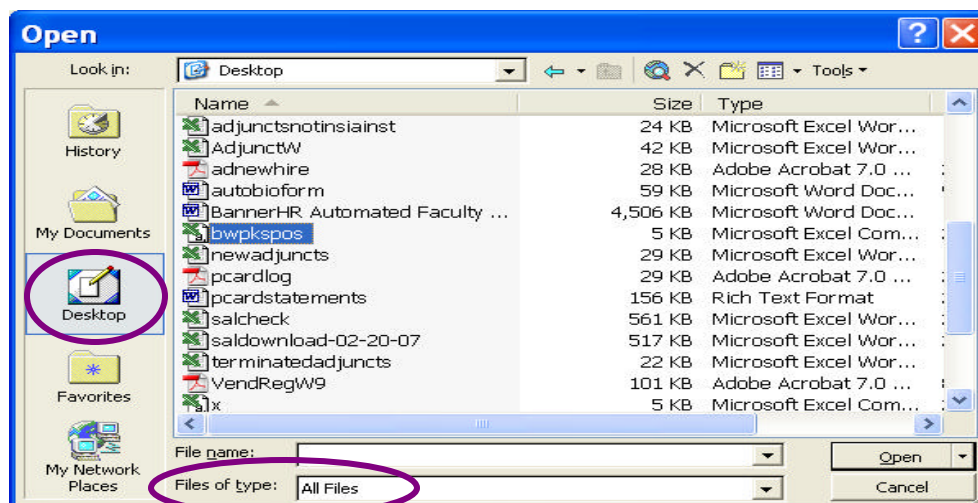
3) Scroll down the Worksheet to the section labeled "NBREPLD: Extracted Position Labor Distribution Salary Planner Table."

4) Use your mouse to click and drag to select the contents of this section of the spreadsheet starting with and including the row of column labels (Position, Organization, etc.).

5) Under the Data menu select Sort and then specify "Sort by" as Fund Code and "Then by" as Orgn Code. Click on OK.

	Position	Organizati	Percent Pr	Record St	Budget Pri	Coas Cod	Acci Code	Fund Code	Orgn Code	Acct Code	Pr		Code Ac
40	NBREPLD: Extracted Position Labor Distribution Salary Planner Table												
42	C99523	20240	100 N		9427.64 W			120100	20240	61841			
43	C99524	20240	100 N		9097 W	214310		120100	20240	61841			
44	C99531	20240	100 C		18106.25 W			120100	20240	61841			
45	C99531	20240	0 C		0 W	215030		120100	20000	61841			
46	C99559	20240	100 N		16510.2 W			120100	20240	61841			
47	C99570	20240	100 N		15000 W	214310		120100	20240	61841			
48	C99588	20240	100 N		11917.82 W			120100	20240	61841			
49	C99591	20240	100 N		16147.13 W			120100	20240	61841			
50	C99715	20240	100 N		22130.83 W			120100	20240	61841			
51	C99720	20240	100 N		18195 W	214310		120100	20240	61881			
52	C99767	20240	100 N		21000 W	214310		120100	20240	61813			
53	C99806	20240	100 N		21843.51 W			120100	20240	61813			
54	C99850	20240	100 N		18500 W			120100	20240	61841			
55	C99885	20240	100 N		18949.09 W			120100	20240	61881			
56	C99920	20240	100 N		19133.41 W			120100	20240	61881			
57	E99983	20240	100 N		0 W			120100	20240	61405		510	
58	P99491	20240	100 N		86000 W	214310		120100	20240	61685		510	
59	P99657	20240	50 C		23000 W	214310		120100	20240	61685		510	
60	P99657	20240	50 C		23000 W	215030		120100	20000	61685		510	
61	P99659	20240	100 N		37553.01 W			120100	20240	61735		510	
62	P99668	20240	100 N		34678.82 W			120100	20240	61735		510	
63	P99677	20240	100 N		36157.6 W			120100	20240	61735		510	

6) **Do not** click elsewhere in the spreadsheet – leave the text selected.

7) Under the Tools menu select Options and on the View tab make sure that "Outline symbols" is checked. Click on OK.
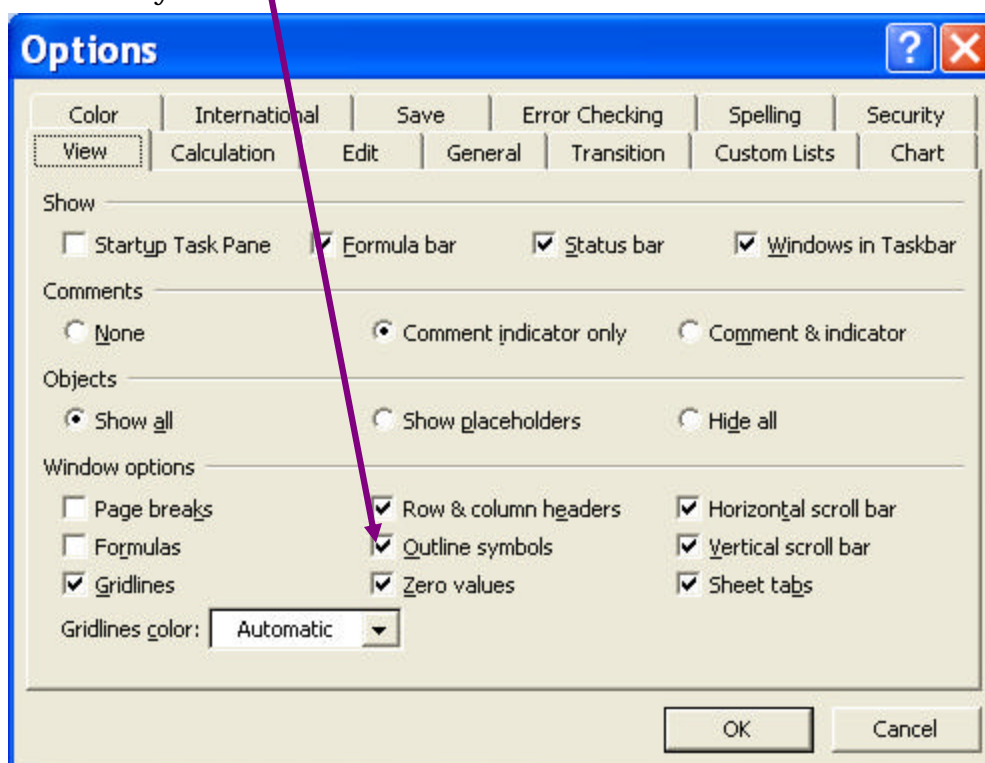
8) Under the Data menu select Subtotals. Complete the Subtotal box as pictured below. Click on OK.

Make sure Budget Proposed is the only item checked under "Add subtotal to:"

9) <u>Again</u> select Subtotals under the Data menu and this time complete the subtotal box as pictured below. Click on OK.

Note that this time you uncheck Replace current subtotals

10)   Click on the Outline Number 3 if you have 4 outline numbers

or on Outline Number 2 if your have 3 outline numbers

This will show you a total for each E&G "Org" as well as an E&G total.

This will also show you totals for each of your non-E&G "Funds".

Final Step 4 –
Extracting Salary Information by Employee into Excel

When all changes have been input, you can extract the salary information for all employees into Excel.

1. Follow Steps 1 through 9 on pages 1 & 2 - under Position Filter select the highest org level listed (3-digit College org).
2. At the bottom of the List by Employee screen, click on <u>Download Job and Distribution</u>
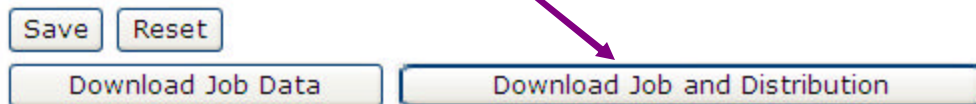
3. Click on <u>Save</u> and then select Desktop as the location
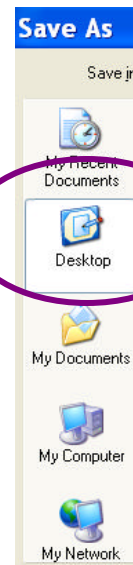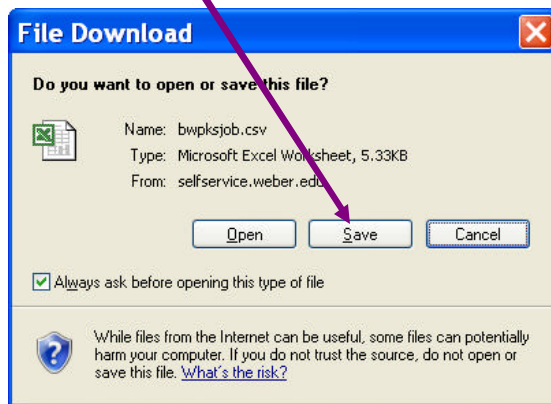
4. Open Excel
5. Open bwpksjob file. Please note that you need to "Look in" your Desktop and change the "Files of type" to be All Files
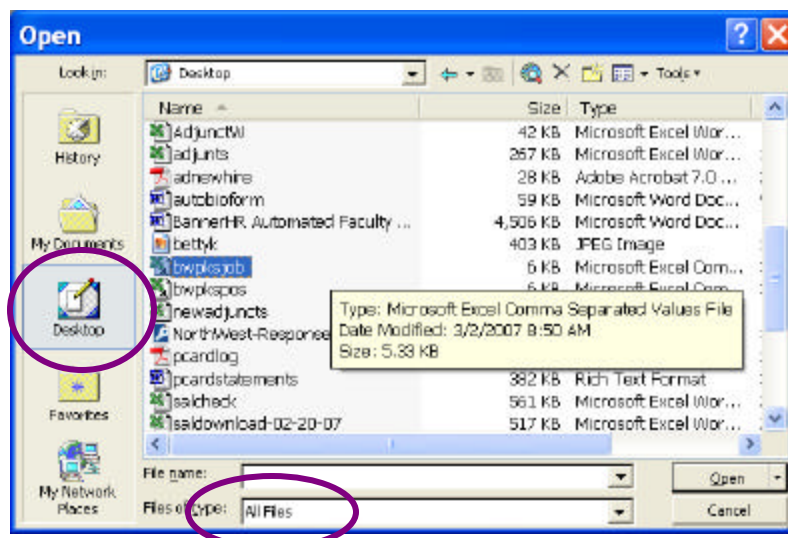
The data are in four parts:

Part 1.   The NBREJOB section lists each employee with their current annual salary (column M) and their new annual salary (column N)

	B	C	D	E	F	G	H	I	J	K	L	M	N	O
4	Scenario:	WORKING												
5	Organizatio	999	Fictitious College											
6	Include Su	Y												
7	Employee	All												
8	Bargaining	All												
9	Faculty Ra	All												
10	Include Po	Y												
11	Include Va	Y												
12														
13														
14														
15	NBREJOB: Extracted Job Detail Salary Planner Table.													
16	ID	Last Name	First Name	Middle Nar	Position	Suffix	Effective D	Effective D	Personnel	Organizati	Position E	Employee	Annual Sa	Annual Sa	Appointme Ap
17	W0000766	Jones	Laura	Ann	P99752	0	1-Jul-06	1-Jul-07	1-Jul-07	20150	PF	PF	35375.51	36636.78	100
18	W0000174	Smith	Andrea	B	C99563	0	16-Dec-06	1-Jul-07	1-Jul-07	20120	CF	CF	11440	11983.2	100
19	W0108318	Brown	Pamela		C99528	0	13-Nov-06	1-Jul-07	1-Jul-07	20115	CP	CF	15600	16268	100
20	W0000205	White	Robert	H	P99869	0	1-Jul-06	1-Jul-07	1-Jul-07	20150	PF	PF	60486.22	62500.81	100
21	W0000126	Johnson	Rebecca	J	F99576	0	1-Jul-06	1-Jul-07	1-Jul-07	20125	FF	FF	72856.8	75242.5	100
22														
23														
24														
25	NBRSALC: Salary Planner Salary Change Table.													
26	ID	Last Name	First Name	Middle Nar	Position	Suffix	Effective D	Job Chang	Change Pe	Change Amount				
27	W0000768	Jones	Laura	Ann	P99752	0	1-Jul-06	COLA	3	1061.27				
28	W0000768	Jones	Laura	Ann	P99752	0	1-Jul-06	MERIT	0.57	200				
29	W0000174	Smith	Andrea	B	C99563	0	16-Dec-06	COLA	3	343.2				
30	W0000174	Smith	Andrea	B	C99563	0	16-Dec-06	MERIT	1.75	200				
31	W0108318	Brown	Pamela		C99528	0	13-Nov-06	COLA	3	468				
32	W0108318	Brown	Pamela		C99528	0	13-Nov-06	MERIT	1.28	200				

Part 2.   The NBRSALC section lists each employee with each change amount allocated to that employee. *Note: COLA is the Job Change code used for general increase (satisfactory performance).*

Part 3.   You can delete the NBRERRN section - it only shows the calculated hours per pay period (40 hrs per week times 52 weeks per year divided by 24 pay periods = 86.67 for a full-time person, 43.34 for a half-time person, 65 for a 75% person, etc.).

37														
38														
39														
40	NBRERRN: Extracted Job Default Hours Salary Planner Table.													
41	ID	Last Name	First Name	Middle Nar	Position	Suffix	Effective Da	Effective D	Earn Code	Organizati	Shift	Record Sta	Hours	Hours Prop	Cancel Dat S
42	W0000174	Smith	Andrea	B	C99563	0	16-Dec-06	1-Jul-07	5	20120	1	N	43.34	43.34	
43	W0108318	Brown	Pamela		C99528	0	13-Nov-06	1-Jul-07	5	20115	1	N	65	65	
44														
45														
46														
47	NBREJLD: Extracted Job Labor Distribution Salary Planner Table.													
48	ID	Last Name	First Name	Middle Nar	Position	Suffix	Effective Da	Organizati	Percent Pr	Record Sta	Coas Code	Acci Code	Fund Code	Orgn Code	Acct Code P
49	W0000768	Jones	Laura	Ann	P99752	0	1-Jul-07	20150	86	N	W	215050	120100	20150	61510
50	W0000768	Jones	Laura	Ann	P99752	0	1-Jul-07	20150	14	N	W	225005	130200	20150	61510
51	W0000174	Smith	Andrea	B	C99563	0	1-Jul-07	20120	0	C	W	215030	120100	20000	61957
52	W0000174	Smith	Andrea	B	C99563	0	1-Jul-07	20120	100	N	W	213525	120100	20120	61957
53	W0000174	Smith	Andrea	B	C99563	0	1-Jul-07	20120	50	C	W	215030	120100	20000	61957
54	W0108318	Brown	Pamela		C99528	0	1-Jul-07	20115	66.67	N	W	204032	120100	20115	61957
55	W0108318	Brown	Pamela		C99528	0	1-Jul-07	20115	33.33	N	W	213609	120100	20160	61957
56	W0000205	White	Robert	H	P99869	0	1-Jul-07	20150	85.79	N	W	215050	120100	20150	61600
57	W0000205	White	Robert	H	P99869	0	1-Jul-07	20150	14.21	N	W	225005	130200	20150	61600
58														
59														

Part 4.   The NBREJLD section shows how the person will be split across different FOAPs.

The example shows how the data comes into Excel. From here you can resize columns, copy each section into a new spreadsheet, eliminate unnecessary columns, sort the data, etc.