Banner Human Resources
Salary Planner Training Workbook

MAY 2006

RELEASE 7.2

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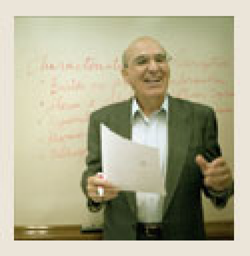


Section A: Introduction

Lesson: Overview

Jump to TOC

Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to define, edit, and update position budgets and job salaries for a select population through the Employee Self Service Web.

At the end of this session, you will be able to perform the following functions within Banner Human Resources:

- understand the form changes necessary for the Salary Planner functionality within the Banner HR system
- establish proper security in the current Banner HR set-up and implement new security functionality for Salary Planner
- understand basic functionality of Salary Planner through the Employee Self Service Web.

The workbook is divided into four sections:

- Introduction
- Set Up
- Day-to-Day Operations
- Reference

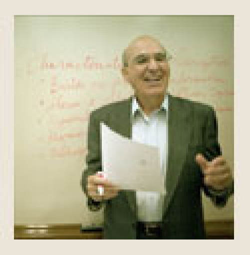
Intended audience

Human Resources Administrators, Human Resources Office Staff, and Budget Administrators.

Prerequisites

You should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals” or have equivalent experience navigating in the Banner system
- completed the Human Resources Overview training workbook
- completed Position Control and Budgeting training workbook
- completed Employment and Compensation training workbook
- completed Biographic/Demographic training workbook
- completed Self Service for Employees training workbook
- administrative rights to create the rules and set the validation codes in Banner.
- Banner HR fully implemented or near the end of the implementation.



Section A: Introduction

Lesson: Overview (Continued)

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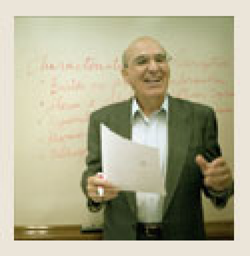


Section A: Introduction

Lesson: Process Introduction

Jump to TOC

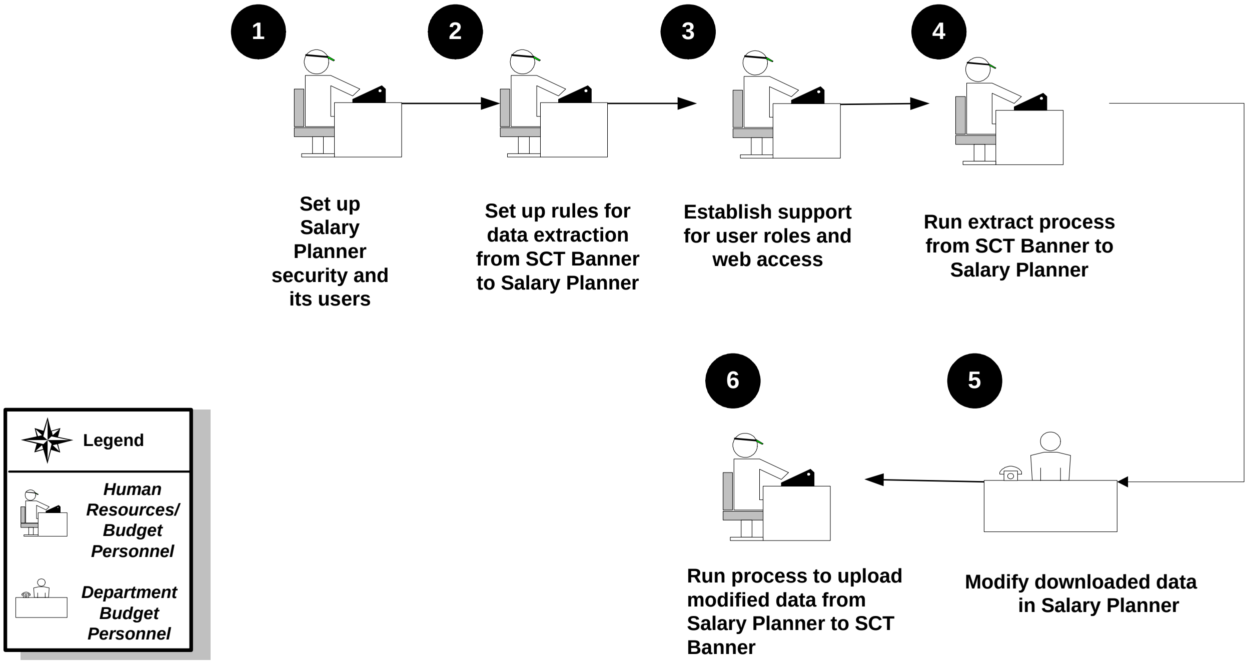
About the process

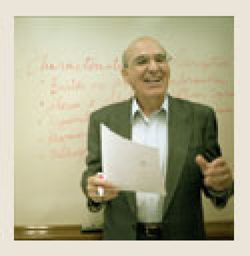
To implement and use the Salary Planner in Employee Self-Service, an enterprise must

- establish Banner Security for the Salary Planner
- set up rules for Salary Planner in Human Resources and/or Finance forms
- establish support for user roles and access to the relevant Web pages in WebTailor
- extract data from Banner into the Salary Planner
- modify the downloaded data in the Salary Planner
- run the NBPSPUP process to upload modified data from the Salary Planner into Banner.

Flow diagram

This diagram highlights the processes for using Salary Planner.





Section A: Introduction

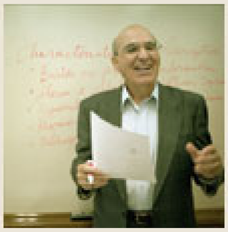
Lesson: Process Introduction (Continued)

Jump to TOC

What happens

The stages of the process are described in this table.

Stage	Description
Human Resources/Budget Personnel	
1	Sets up security for the Salary Planner and each of its users in Banner.
2	Sets up rules to extract data from Banner into the Salary Planner with NTRSPEX.
3	Establishes support for user roles and access to the relevant Web pages in WebTailor.
4	Runs the NBPSPEX process to extract data from Banner into the Salary Planner.
Department Budget Personnel	
5	Modifies the downloaded data in the Salary Planner.
Human Resources/Budget Personnel	
6	Runs the NBPSPUP process to upload modified data from the Salary Planner into Banner.



Section A: Introduction

Lesson: Terminology

Jump to TOC

Salary Planner

The Salary Planner of the Employee Self-Service product is a Web application that allows authorized administrative personnel such as HR Managers and Department Heads to evaluate, plan, and create Position Budgets for any fiscal year. This application allows designated employees the ability to edit multiple versions of working budgets to eventually determine the final fiscal year budget that meets the approval of the organization.

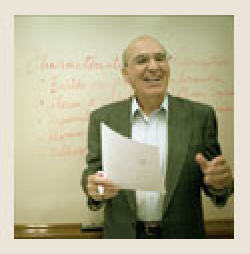
In addition, the Salary Planner provides the ability to evaluate and modify job salary information for salary changes anytime during the year. This application allows job changes related to job detail, hours, and labor distributions to be uploaded to jobs utilizing electronic personnel action forms.

Banner Self Service

Banner Self Service is a web application that allows you to give users access to specific tasks through your organization's intranet. Some tasks such as time entry and time entry approvals link back to Banner. Other tasks such as creating position budget scenarios must be uploaded back into Banner once you have modified and approved the proposed changes.

Budget Scenarios

Budget Scenarios are data extracted from the Banner system that can be modified without affecting the actual data in the Banner system. In this way, a person can see the results of modifying the position budgets in several different ways (such as giving a 2.5%, 5%, or 10% raise to all employees or different amounts to employees by position types).



Salary Planner vs. Spreadsheet Budgeting

Salary Planner is an alternative to several current Banner HR methods:

The Salary Planner is a more robust alternative to the Spreadsheet Budgeting module available in Banner HR. Spreadsheet Budgeting is used to extract and manipulate Position Budgeting data for the upcoming fiscal year by use of a MS-Excel file. Once created, the MS-Excel file does not value the Banner HR security and multiple copies of this file can lead to misuse.

Salary Planning uses the current Employee Self Service to model next year's position budgeting. It is, therefore, a web-based solution that carries the current Banner HR security, as well as added security overlays, throughout the process.

The following table draws a comparison between the Salary Planner and Spreadsheet Budgeting.

Feature	Salary Planner	Spreadsheet Budgeting
Downloads Positions and Jobs Salary Data?	Yes	Yes
Upload Position budgets?	Yes	Yes
Upload Job Salary Data?	Yes	No
Security control over data after it has been downloaded?	Yes	No

Alternative to the Mass Salary Update

The Salary Planner is an alternative to the Mass Salary Update functionality in Banner HR. The Salary Planner allows management to extract and manipulate current job and employee salary information from the current fiscal year and apply it back to Banner HR. This can be done by segments of the employee population and current job change reasoning is enforced. The new functionality in Banner HR includes a new way of segmenting positions specifically for the Salary Planner module.

The funding sources used to budget the positions can be easily distributed one level down to the employee job records. Employee job funding sources can also be copied up one level to the position record if desired. With proper security, full disclosure of all employee assignments is available.

Section B: Set Up

Lesson: Overview

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Introduction

The purpose of this section is to provide you with the knowledge and practice to set up the security and Banner forms needed when using the Salary Planner.

Intended audience

Human Resources Administrators, Human Resources Office Staff, and Budget Administrators.

Objectives

At the end of this session, you will be able to perform the following functions within Banner Human Resources

- understand the form changes necessary for the Salary Planner functionality within the Banner HR system
- establish proper security in the current Banner HR set-up and implement new security functionality for Salary Planner.

Prerequisites

You should have

- completed the Education Practices computer-based training (CBT) tutorial "Banner 7 Fundamentals" or have equivalent experience navigating in the Banner system
- completed the Human Resources Overview training workbook
- completed Position Control and Budgeting training workbook
- completed Employment and Compensation training workbook
- completed Biographic/Demographic training workbook
- completed Self Service for Employees training workbook
- administrative rights to create the rules and set the validation codes in Banner.
- Banner HR fully implemented or near the end of the implementation.

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Section B: Set Up

Lesson: Process Introduction

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Introduction

To implement and use the Salary Planner in Employee Self-Service, an institution must

- establish Banner Security for the Salary Planner
- set up rules for Salary Planner in Human Resources and/or Finance forms
- establish support for user roles and access to the relevant Web pages in WebTailor.

Security

Security for Salary Planner can only be used in conjunction with Banner Human Resources. Security will be established in the Banner Human Resources Module. Security for the salary planner is defined at various levels, organization level, employee class level, employer level and at the Salary level.

In addition to limiting access to budget information via security, a new position control form, Salary Planner Security form NSASPSC has been added to allow control of the extent of information that can be updated by users.

Organizational Hierarchy

An organization hierarchy structure must be established for the Salary Planner. Organization hierarchy can be implemented at institutions having either Banner Human Resources or Banner Finance.

If your institution has	**Then use**
Banner Finance	the Organization Code Maintenance Form (FTMORGN).
Banner Human Resources	the Organization Code Validation Form (PTVORGN).
Both	the Organization Code Maintenance Form (FTMORGN). Note: Organization hierarchy in Banner Finance takes precedence for enterprises that have Banner Human Resources as well as Banner Finance.

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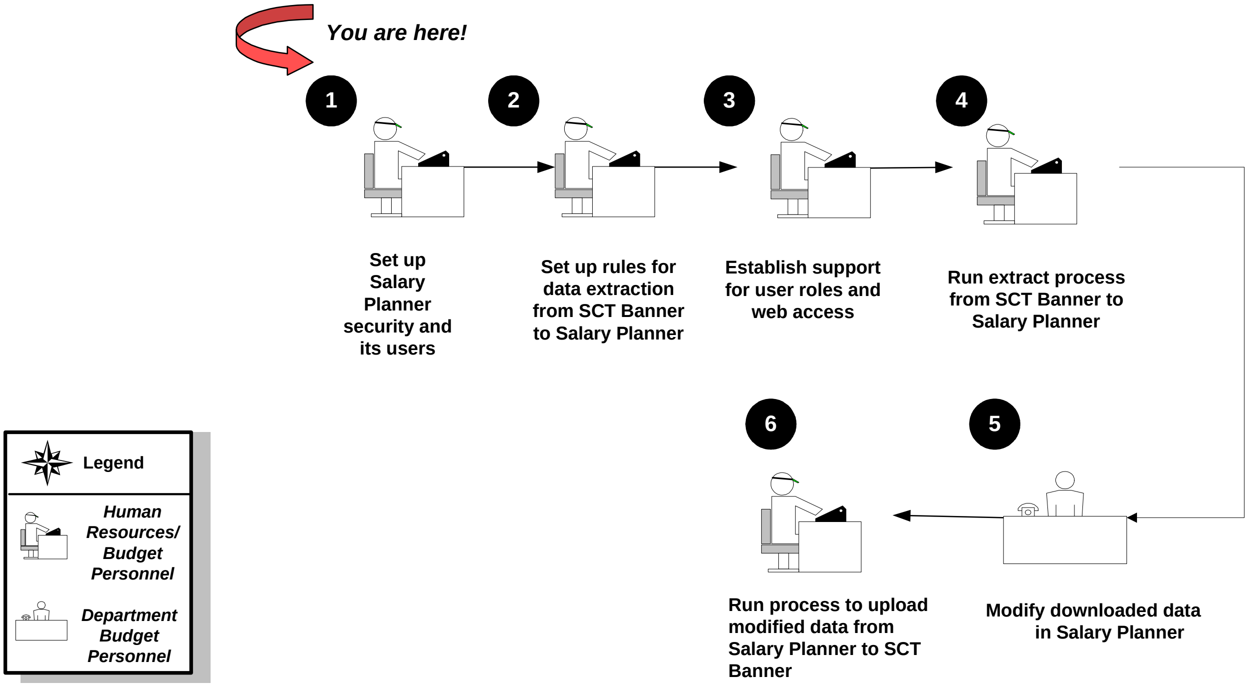
Flow diagram

This diagram highlights the processes for using Salary Planner.



Jump to TOC

What happens

The stages of the process are described in this table.

Stage	Description
Human Resources/Budget Personnel	
1	Sets up security for the Salary Planner and each of its users in Banner.
2	Sets up rules to extract data from Banner into the Salary Planner with NTRSPEX.
3	Establishes support for user roles and access to the relevant Web pages in WebTailor.
4	Runs the NBPSPEX process to extract data from Banner into the Salary Planner.
Department Budget Personnel	
5	Modifies the downloaded data in the Salary Planner.
Human Resources/Budget Personnel	
6	Runs the NBPSPUP process to upload modified data from the Salary Planner into Banner.

Section B: Set Up

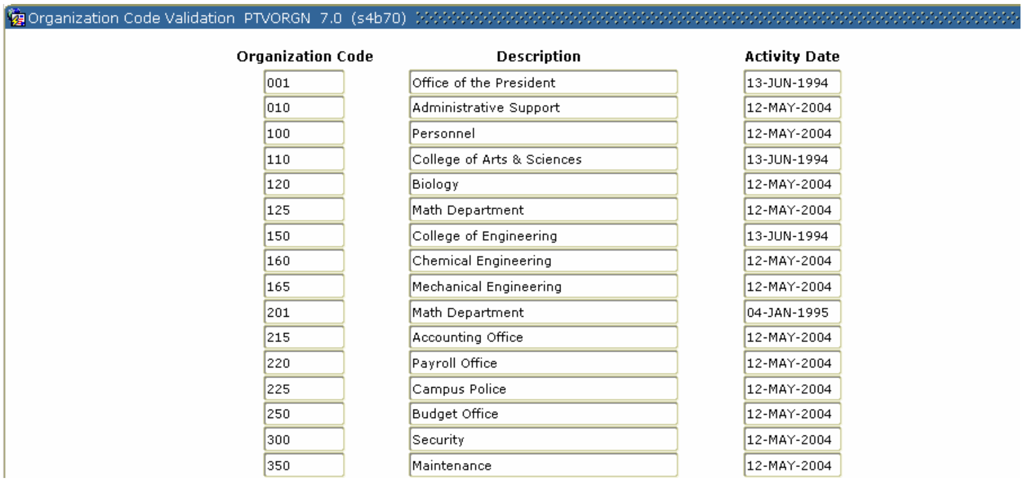
Lesson: Organization Code Validation Form

Jump to TOC

Purpose

The Organization Code Validation Form (PTVORGN) is used to set up an organizational hierarchy when Banner Finance is not installed.

Banner form



Organization Code Validation PTVORGN 7.0 (s4b70)

Organization Code	Description	Activity Date
001	Office of the President	13-JUN-1994
010	Administrative Support	12-MAY-2004
100	Personnel	12-MAY-2004
110	College of Arts & Sciences	13-JUN-1994
120	Biology	12-MAY-2004
125	Math Department	12-MAY-2004
150	College of Engineering	13-JUN-1994
160	Chemical Engineering	12-MAY-2004
165	Mechanical Engineering	12-MAY-2004
201	Math Department	04-JAN-1995
215	Accounting Office	12-MAY-2004
220	Payroll Office	12-MAY-2004
225	Campus Police	12-MAY-2004
250	Budget Office	12-MAY-2004
300	Security	12-MAY-2004
350	Maintenance	12-MAY-2004

Procedure

Follow these steps to set up an organization hierarchy.

Step	Action
1	Access the Organization Code Validation Form (PTVORGN).
2	Enter an organization code in the **Organization Code** field.
3	Enter a description in the **Description** field.
4	Repeat steps 2 and 3 until you have entered all required organization codes. The entered codes will be used as predecessor codes.
5	Click the **Save** icon.
6	Click the **Exit** icon.

Section B: Set Up

Lesson: Organization Code Maintenance Form

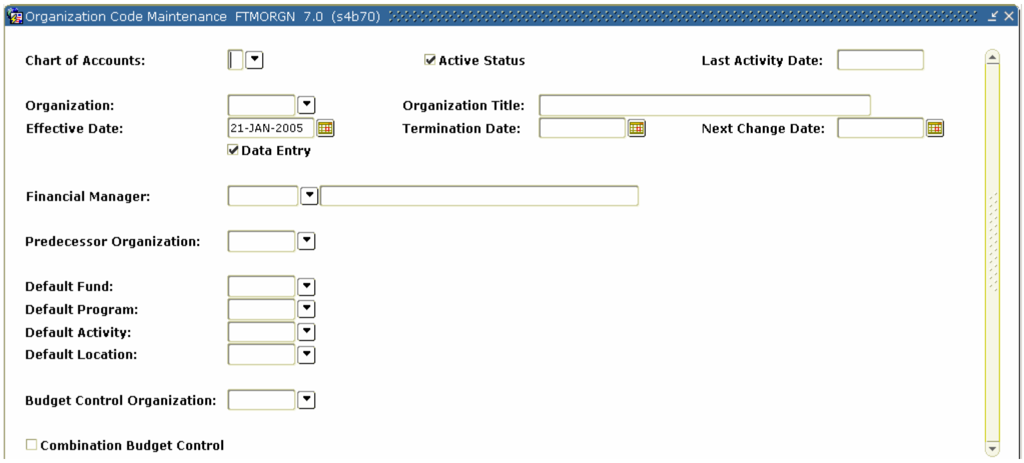
Jump to TOC

Purpose

Use the Organization Code Maintenance Form (FTMORGN), if Banner Finance is installed, to set up an organizational hierarchy.

Proceeding in this manner, an organization hierarchy of up to 8 levels can be defined and viewed on this form. This functionality is similar to the corresponding Finance form, Organization Code Maintenance Form (FTMORGN).

Banner form



Organization Code Maintenance FTMORGN 7.0 (s4b70)

Chart of Accounts:
☑ Active Status
Last Activity Date:

Organization:
Organization Title:
Effective Date: 21-JAN-2005
Termination Date:
Next Change Date:
☑ Data Entry

Financial Manager:

Predecessor Organization:

Default Fund:
Default Program:
Default Activity:
Default Location:

Budget Control Organization:

☐ Combination Budget Control

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Organization Code Maintenance Form (FTMORGN).
2	Select a chart of accounts code in the **Chart of Accounts** field.
3	Enter organization codes for the creation of a hierarchy in the **Organization** field.
4	Enter a short description for the new organization code in the **Organization Title** field.

Jump to TOC

Procedure, continued

IF	THEN
your new institution code has a predecessor organization	enter a previously saved organization code in the **Predecessor Organization** field. go to step 11. <u>Result</u>: For predecessor organizations, the system displays the description of the corresponding organization by default, since the information has been previously saved.
no predecessor organization exists	go to step 6.

Step	Action
5	Select a value in the **Default Fund** field.
6	Select a value in the **Default Program** field.
7	Select a value in the **Default Activity** field.
8	Select a value in the **Default Location** field.
9	Select a value in the **Budget Control Organization** field.
10	Click the **Save** icon.
11	Click the **Exit** icon.

Section B: Set Up

Lesson: Position Control Installation Rule Form

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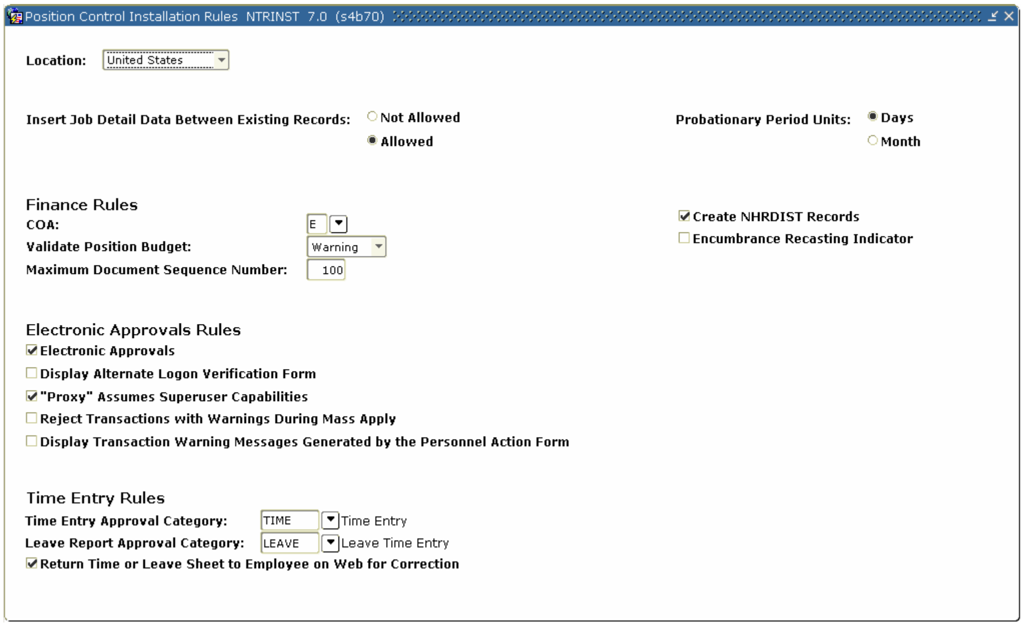
Purpose

The Position Control Installation Rule Form (NTRINST) contains overall rules for processing items in Position Control and setting controls for Electronic Approvals.

Salary Planner Rules allow the user to set up controls used with the Employee Self-Service Salary Planner product. Access the Salary Planner Rules window from the options menu of the Position Control Installation Rules Form (NTRINST).

Banner form



Location: United States

Insert Job Detail Data Between Existing Records: ○ Not Allowed ● Allowed

Probationary Period Units: ● Days ○ Month

Finance Rules

COA: E

Validate Position Budget: Warning

Maximum Document Sequence Number: 100

☑ Create NHRDIST Records

☐ Encumbrance Recasting Indicator

Electronic Approvals Rules

☑ Electronic Approvals

☐ Display Alternate Logon Verification Form

☑ "Proxy" Assumes Superuser Capabilities

☐ Reject Transactions with Warnings During Mass Apply

☐ Display Transaction Warning Messages Generated by the Personnel Action Form

Time Entry Rules

Time Entry Approval Category: TIME Time Entry

Leave Report Approval Category: LEAVE Leave Time Entry

☑ Return Time or Leave Sheet to Employee on Web for Correction

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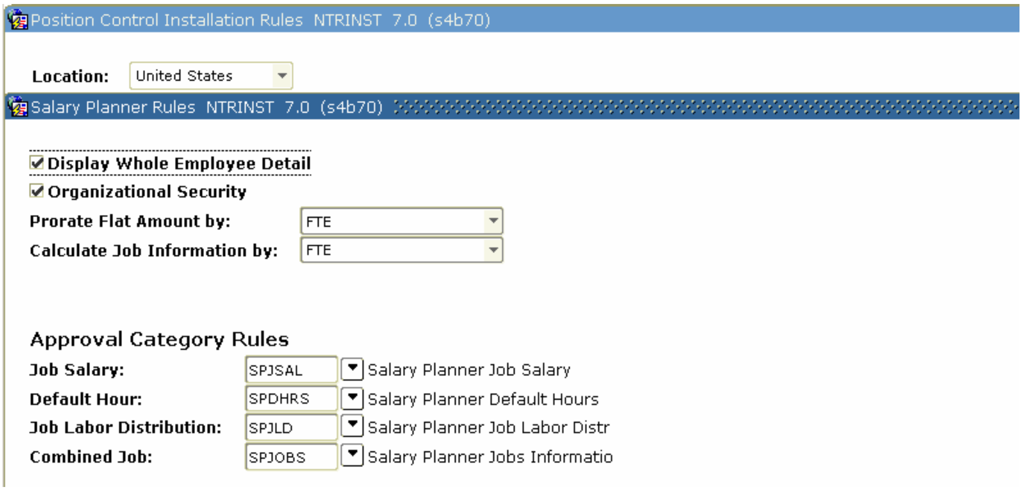
Options – Salary Planner Rules



Position Control Installation Rules NTRINST 7.0 (s4b70)

Location: United States

Salary Planner Rules NTRINST 7.0 (s4b70)

☑ **Display Whole Employee Detail**

☑ **Organizational Security**

Prorate Flat Amount by: FTE

Calculate Job Information by: FTE

Approval Category Rules

Job Salary:	SPJSAL	Salary Planner Job Salary
Default Hour:	SPDHRS	Salary Planner Default Hours
Job Labor Distribution:	SPJLD	Salary Planner Job Labor Distr
Combined Job:	SPJOBS	Salary Planner Jobs Informatio

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access the Position Control Installation Rule Form (NTRINST).
2	Select Salary Planner Rules from the **Options** menu.
3	Click the **Display Whole Employee Detail** checkbox to enable Salary Planner users to view an employee's job(s) across all COAs and Organizations regardless of HR security. This indicator affects the display of data on the List by Employee page and the Employee Details page in the Salary Planner. A check indicates Yes; Unchecked indicates No. Note: This feature allows a user to view all jobs belonging to an employee that may be associated to organizations other than those to which the user is authorized. The system displays all jobs as long as the user has organizational access to at least one of them. In essence this rule overrides the organization security set up for the Salary Planner when viewing records on the Employee Detail page. It will also enable the Employee Totals columns on the List by Employee page.
4	Click the **Organizational Security** checkbox to enforce organization security at the system level in the Salary Planner. This rule causes the system to check the security set up on PTRUSER and NSASPSC for each Salary Planner user. A check indicates Yes. Unchecked indicates No.

Jump to TOC

Procedure, continued

Step	Action
5	Select a method in the **Prorate Flat Amount By** field to automatically prorate flat amount mass changes based on any of the following factors: FTE Appointment percent or None (No Proration). The selected proration method will apply to *mass changes* on jobs and positions. Note: If the Base FTE or Base Appointment percent is changed on a specific record in the Salary Planner after a mass change, it will not result in a corresponding proration change in the proposed amount. This automated functionality affects the List by Position page, List by Job page, and the Employee Detail page in the Salary Planner, in Employee Self-Service.
6	Select a method in the **Calculate Job Information Based On** field to calculate job information from the following options: FTE Appointment percent or None (No Proration). Based on the selected method the Hours per Pay, Hours per Day, and the Default Hours are calculated for hourly jobs whereas the annual salary and a new hourly rate is calculated for salaried jobs. *Example*: If the FTE method is selected to calculate job information for an hourly job, and the FTE is changed from 1 to 0.5, then the Hours per Pay, Hours per Day and the Default hours are also reduced proportionately. This automated functionality affects the Job Details page and the Employee Details page in the Salary Planner.
7	Select an approval category in the **Job Salary Approval Category** field to use with any job salary updates made in the Salary Planner via EPAFs. Result: The system displays a short description of the selected Approval Category. Note: Identify Approval Categories to incorporate job and salary updates made in the Salary Planner back into Banner via electronic approvals using the Salary Planner Upload Process (NBPSPUP).

Jump to TOC

Procedure, continued

Step	Action
8	Select an approval category in the **Default Hour Approval Category** field to use with any changes made to the Default Hours in the Salary Planner via EPAFs. Result: The system displays a short description of the selected Approval Category.
9	Select an approval category in the **Job Labor Distribution Approval Category** field to use with any changes made to the Job Labor Distributions in the Salary Planner through EPAFs. Result: The system displays a short description of the selected Approval Category.
10	Select an approval category in the **Combined Job Approval Category** field to use if changes have been made to the job information in more than one aspect (i.e., default hours, job salary or job labor distribution) in the Salary Planner. The Approval Category selected in this field will be used by default in the instance of multiple changes to job information. Note: Approval Categories and their supporting rules are available through a script (SQL) provided with the 6.1 release.
11	Click the **Save** icon.
12	Click the **Exit** icon to return to the Position Control Installation Rule Form (NTRINST).
13	Click the **Exit** icon.

Section B: Set Up

Lesson: Installation Rule Form

Jump to TOC

Purpose

The Installation Rule Form (PTRINST) enables you to identify rules that apply throughout your institution and establish them in the database at an installation level. The main window collects payroll, regulatory, finance interface, and security activation rules.

Banner form

Installation Rules PTRINST 7.2 (s4b70)

Payroll or Finance Rules

☑ Display Amount or Rate at Time Rules

☐ Generate Records for Non-Scheduled Work Days

Payroll Interface Date: Check Date

☑ Revoke Electronic W-2 Consent on Employee Termination

FSA Grace Period

Additional Months: 2

Additional Days:

Web Information

Latest Year-End Statement to Display W-2 or T4: 2006

☑ Certification Required on the Web

☑ Employee May Update Direct Deposit Records

Regulatory Rules

Temporary I-9 Limit Days: 21

Tax Free Life Insurance:

Employee: 50,000.00

Dependent: 2,000.00

SIN Validation: Error

Security Level Activation Rules

☑ Employer Security

☑ Salary Security

☑ Organization Security

☑ Employee Class Security

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Installation Rule Form (PTRINST).
2	Click the **Employer Security** checkbox if Banner Human Resources System's employer security is turned on.
3	Click the **Salary Security** checkbox if Banner Human Resources System's salary security is turned on.

Jump to TOC

Procedure, continued

Step	Action
4	Click the **Organization Security** checkbox if Banner Human Resources System’s organization security is turned on.
5	Click the **Employee Class Security** checkbox if Banner Human Resources System’s employee class security y is turned on.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Section B: Set Up

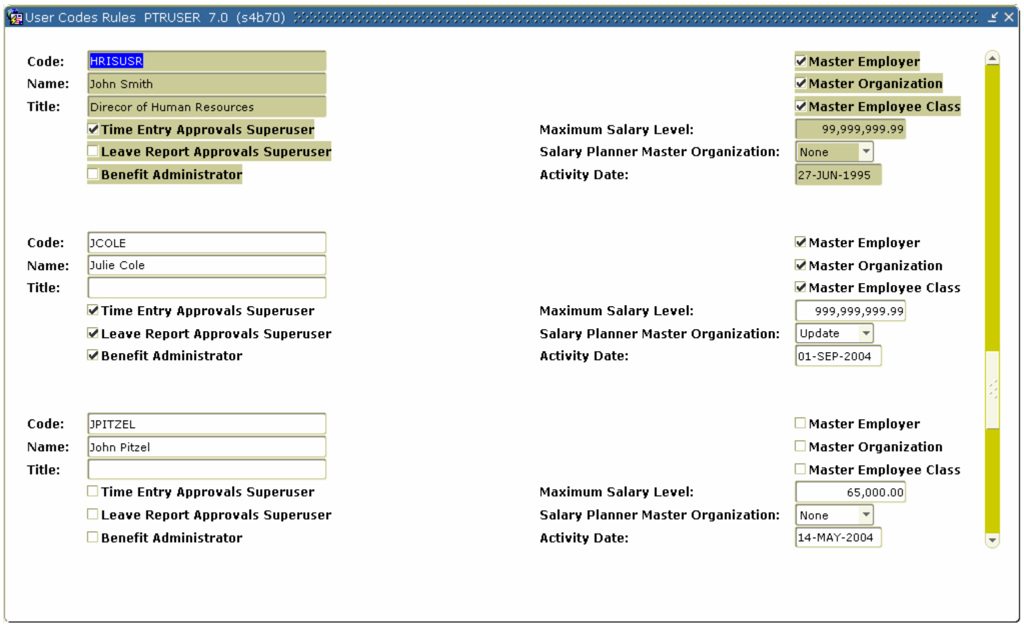
Lesson: User Codes Rule Form

◀ Jump to TOC

Purpose

The User Codes Rule Form (PTRUSER) establishes User IDs for security purposes. It enables you to define the maximum salary level that can be viewed by specified users and to assign access privileges for all organizations and/or employee classes.

Banner form



User Codes Rules PTRUSER 7.0 (s4b70)

Code: HRISUSR
Name: John Smith
Title: Direcor of Human Resources
☑ Time Entry Approvals Superuser
☐ Leave Report Approvals Superuser
☐ Benefit Administrator
☑ Master Employer
☑ Master Organization
☑ Master Employee Class
Maximum Salary Level: 99,999,999.99
Salary Planner Master Organization: None
Activity Date: 27-JUN-1995

Code: JCOLE
Name: Julie Cole
Title:
☑ Time Entry Approvals Superuser
☑ Leave Report Approvals Superuser
☑ Benefit Administrator
☑ Master Employer
☑ Master Organization
☑ Master Employee Class
Maximum Salary Level: 999,999,999.99
Salary Planner Master Organization: Update
Activity Date: 01-SEP-2004

Code: JPITZEL
Name: John Pitzel
Title:
☐ Time Entry Approvals Superuser
☐ Leave Report Approvals Superuser
☐ Benefit Administrator
☐ Master Employer
☐ Master Organization
☐ Master Employee Class
Maximum Salary Level: 65,000.00
Salary Planner Master Organization: None
Activity Date: 14-MAY-2004

Jump to TOC

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the User Codes Rule Form (PTRUSER).
2	Perform an **Insert Record** function.
3	Enter a user code in the **Code** field.
4	Enter a name in the **Name** field.
5	Enter a title in the **Title** field.
6	Click the **Time Entry Approvals Superuser** checkbox to indicate this person can approve all time entry approval requests.
7	Click the **Master Employer** checkbox to give this person access to all employer codes.
8	Click the **Master Organization** checkbox to give this person access to all organization codes.
9	Click the **Master Employee Class** checkbox to give this person access to all employee class codes.
10	Enter an amount this person can view in the **Maximum Salary Level** field.
11	Select *None*, *Update* or *Query* in the **Salary Planner Master Organization** field. Note: Users set up with *Update* access in the **Salary Planner Master Organization** field do not need to be set up on the Salary Planner Security Form (NSASPSC). But users set up with either *query-only* or *no access* to the Salary Planner on this form may need to be set up on NSASPSC if they are to be given update or query access to specific organizations in the Salary Planner.
12	Click the **Save** icon.
13	Click the **Exit** icon.

Section B: Set Up

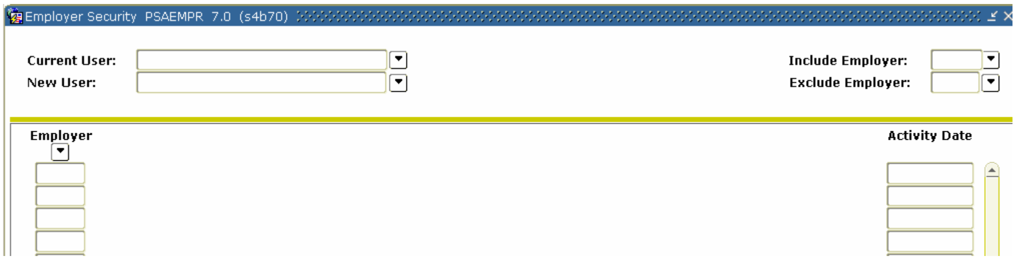
Lesson: Employer Security Form

Jump to TOC

Purpose

The Employer Security Form (PSAEMPR) enables you to create and maintain employer security by users. A user is permitted to access a form if the employer code of any of the user's jobs is present in the Security Block. Codes must be set up only if the Employer Security box is checked in the Installation Rule Form (PTRINST) and the Master Employer box in the User Code Rule Form (PTRUSER) is not checked. If the Master Employer box is checked, the user can access all employer codes.

Banner form



Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Employer Security Form (PSAEMPR).
2	Select the name of the current user in the **Current User** field. Note: This is a required field.
3	Select the name of the new user in the **New User** field. Note: Enter this field only if you wish to copy the organization security of the current user to the new user. Then select Copy Record from the **Options** menu. Optional field.
4	Double click in the **Include Employer** field to enter the appropriate code. Note: This field is used when copying Employer Security form one user to another and when deleting records from the access list. When this field is blank, all employer codes for the user are included in the deletion or creation of Employer Security. Otherwise the name of the Employer Code to be copied/deleted is entered in this field. Wildcard Characters may be used.
5	Double click in the **Exclude Employer** field to enter the appropriate code. Note: This field is used for deleting Employer Codes from the access list and for copying the access list from the current user to the new user. When it is left blank, none of the employer codes are excluded from the deletion or creation of employer security. Otherwise, the employer code to be excluded is entered in this field. Wildcard Characters may be entered.
6	Double click in the **Employer Code** field to enter the appropriate code. Note: Employer codes should be pre-defined on PTREMPR.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section B: Set Up

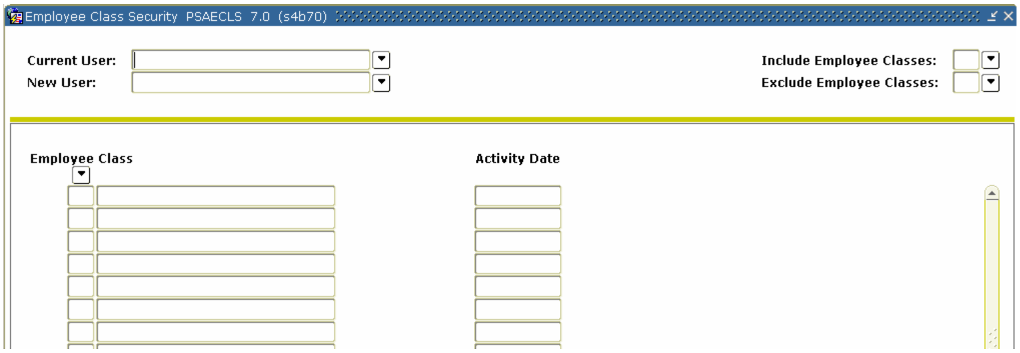
Lesson: Employee Class Security Form

Jump to TOC

Purpose

The Employee Class Security Form (PSAECLS) specifies which employee class codes can be viewed by each user. You can also copy access privileges from one user to another. Security can be copied in its entirety or by excluding or including specified employee classes. This form implements employee class security for a user by setting up the user's access list on the PSRECLS table.

Banner form



Section B: Set Up

Lesson: Employee Class Security Form (Continued)

Jump to TOC

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Employee Class Security Form (PSAECLS).
2	Select the name of the current user in the **Current User** field. Note: This is a required field.
3	Select the name of the new user in the **New User** field. Note: Enter this field only if you wish to copy the organization security of the current user to the new user. Then select Copy Record from the **Options** menu. Optional field.
4	Double click in the **Include Employer** to add the appropriate code Note: This field is used when copying Employee Class Security form one user to another and when deleting records from the access list. When this field is blank, all employee class codes for the user are included in the deletion or creation of Employee Class Security. Otherwise the name of the Employee Class Code to be copied/deleted is entered in this field. Wildcard characters may be used.
5	Double click in the **Exclude Employer** field to add the appropriate **code.** Note: This field is used for deleting Employee Class Codes from the access list and for copying the access list from the current user to the new user. When it is left blank, none of the employee class codes are excluded from the deletion or creation of employee class security. Otherwise, the employee class code to be excluded is entered in this field. Wildcard Characters may be entered.
6	Use the **Search** icon to enter an **Employee Class** Code. Note: Employee Class codes should be pre-defined on PTRECLS.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section B: Set Up

Lesson: Organization Security Form

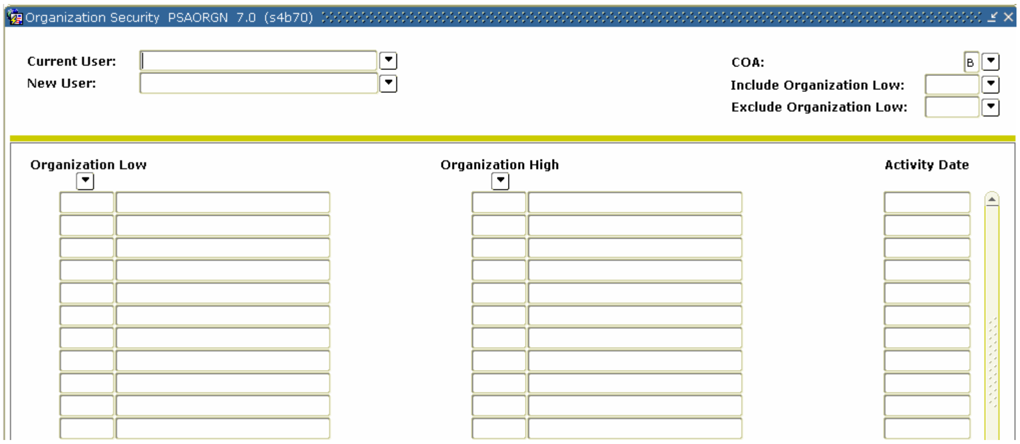
◀ Jump to TOC

Purpose

The Organization Security Form (PSAORGN) specifies which organization code ranges can be viewed by each user. If Banner Finance System is installed at your institution, you can set up different ranges for each Chart of Accounts (COA) code. You can also copy access privileges from one user to another. Security can be copied in its entirety or by excluding or including specified organizations.

This form implements organization security for a user by setting up the user's access range on the PSRORGN table.

Banner form



Organization Security PSAORGN 7.0 (s4b70)

Current User:
New User:
COA: B
Include Organization Low:
Exclude Organization Low:

Organization Low	Organization High	Activity Date

Jump to TOC

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Organization Security Form (PSAORGN).
2	Select the name of the current user in the **Current User** field. Note: This is a required field
3	Enter the name of the new user in the **New User** field. Note: Enter this field only if you wish to copy the organization security of the current user to the new user. Then select Copy Record from the **Options** menu. Optional field.
4	Double click in the **COA** field to enter a Chart of Accounts Code. Note: This field should be entered only when Banner Finance is present.
5	Double click in the **Include Organization Low** to enter a code that will be used when copying Organization Security from one user to another and when deleting organization ranges from the access list. Note: If the field is left blank, all the organization ranges are included in the deletion/copying of Organization Security. Otherwise, the lower organization code of the Organization Range to be copied/deleted is entered in this field. Wildcard Characters may be entered.
6	Double click in the **Exclude Organization Low** field to enter a code that will be used when copying Organization Security from one user to another and when deleting ranges from the access list. Note: When this field is blank, none of the organization ranges are excluded from the deletion/creation of Organization Security. Otherwise, the lower Organization Code of the range to be excluded is entered in this field. Wildcard characters may be used.

Section B: Set Up

Lesson: Organization Security Form (Continued)

Jump to TOC

Procedure, continued

Step	Action
7	Double click in the **Organization Low** field to select the appropriate code. Note: If Banner Finance is installed, this organization belongs to the Chart of Accounts Code entered in the Key Block and is validated against the Finance Organization Validation Form FTVORGN. If there is no Banner Finance, this is validated against the HR Organization Validation Form PTVORGN.
8	Double click in the **Organization High** field to enter the appropriate code. Note: If Banner Finance is installed, it belongs to the Chart of Accounts entered in the Key Block and is validated against the Finance Organization Validation Form FTVORGN. If there is no Banner Finance, it is validated against the HR Organization Validation Form PTVORGN.
9	Click the **Save** icon.
10	Click the **Exit** icon.

Section B: Set Up

Lesson: Salary Planner Security Form

Jump to TOC

Purpose

The Salary Planner Security Form (NSASPSC) form enforces organization security for the Salary Planner. This form should be set up for Salary Planner users who are *not* given Update access in the **Salary Planner Master Organization** field on the User Codes Rule Form (PTRUSER). In other words, organization security should be specified on this form for all Salary Planner users who have been given either Query or None access in **Salary Planner Master Organization** field in PTRUSER.

This form allows you to selectively include or exclude organization access for each user. You can also copy the organization security defined for one user to another within a single Chart of Accounts (COA).

NSASPSC gives you greater control in determining access to data in the Salary Planner as you can not only specify access to a range of organizations, but now also restrict or include access to specific organizations within or outside the range, respectively.

Note: NSASPSC only affects organization security within the Salary Planner enhancement, and does *not* affect other Banner HR security.

The Key block also allows you to copy organization security between two users or delete a user's organization security for specific organizations.

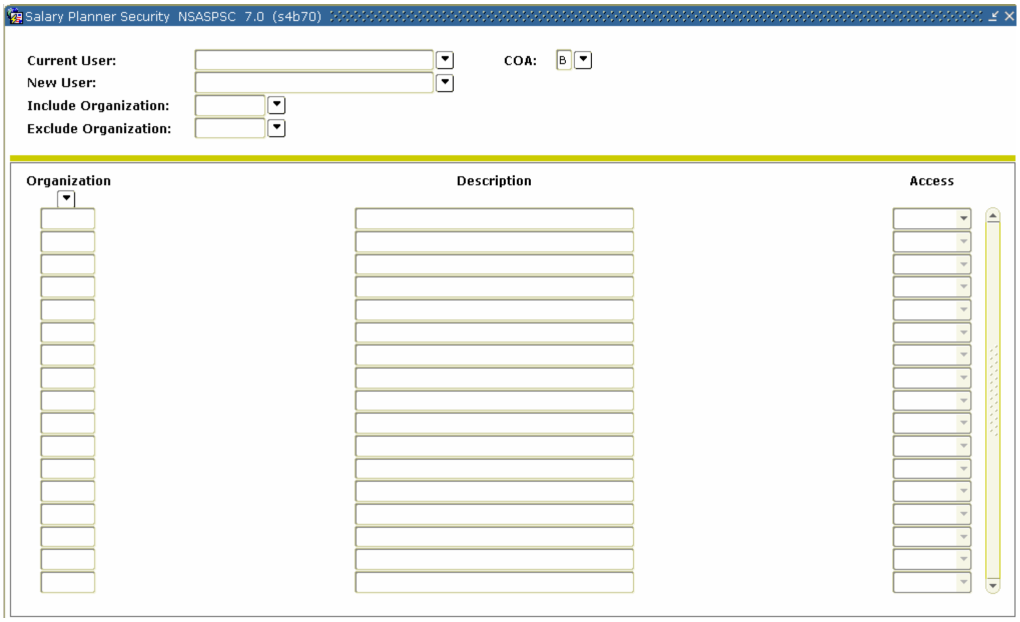
You can copy the organization security from one user to another provided the organizations belong to the same Chart of Accounts code (COA). To copy the organization security from one user to another, specify the information below and then select Copy Record in the **Options** menu. To delete a user's organization security for specific organizations, specify the key block elements and choose Delete Organization by Group in the **Options** menu.

Section B: Set Up

Lesson: Salary Planner Security Form (Continued)

Jump to TOC

Banner form



COA: B

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Salary Planner Security Form (NSASPSC) form.
2	Select the name of the current user in the **Current User** field. Note: This is a required field.
3	Enter the name of the new user in the **New User** field. Note: Enter this field only if you wish to copy the organization security of the current user to the new user. Then select Copy Record from the **Options** menu. Optional field.
4	Enter an organization code in the **Include Organization** field to include organizations for a new user. Note: All organization codes will be copied for the new user, if this field is blank.

Procedure, continued

Step	Action
5	Enter an organization code in the **Exclude Organization** to exclude organizations for a new user. Note: If this field is blank, it does *not* imply all organization codes are excluded for the new user.
6	Enter or select a COA code using the search button in the **COA Code** field. Note: This is required field. The **Organization** field displays a list of organizations that match the include/exclude criteria, if specified in the Key block. Alternatively, you can individually specify the organizations for which access is to be provided by selecting the Search button. The system displays a short description of each selected organization code.
7	Specify the type of access for each organization from the drop-down list in the **Access** field. Note: *Update* enables the user to change and save the modified information in the corresponding Web pages of the Salary Planner. *Query* enables the user to only query on the information displayed in the Salary Planner.
8	Click the **Save** icon.
9	Click the **Exit** icon.

Section B: Set Up

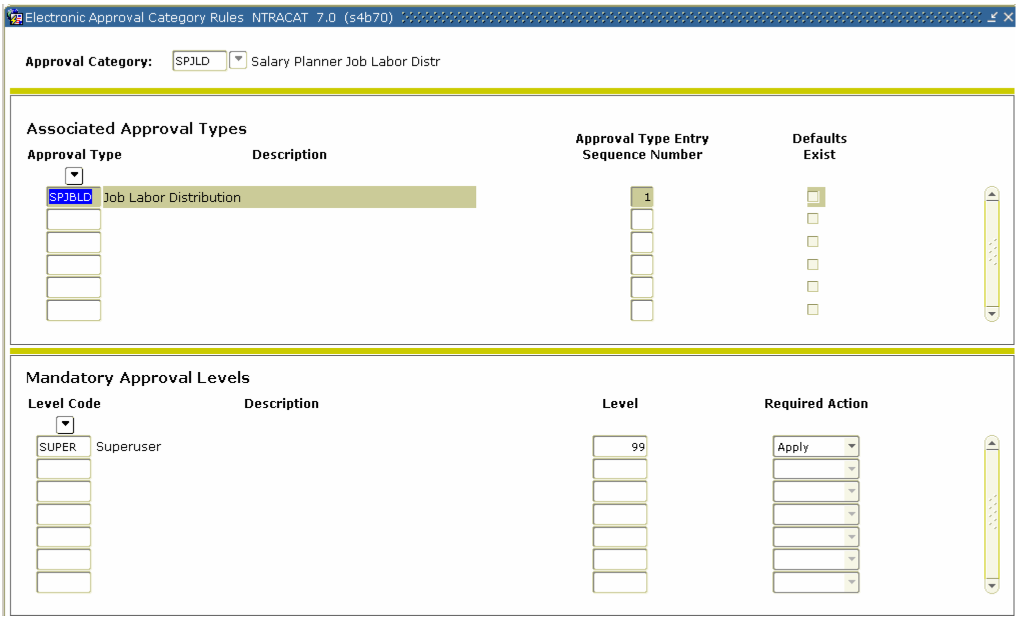
Lesson: Assigning Mandatory Approval Levels

Jump to TOC

Purpose

Assign mandatory approval levels on the Electronic Approval Category Rules Form (NTRACAT) for the approval categories defined from the NSPACAT.SQL script. *Please refer to the Human Resources Electronic Approvals workbook for more information.*

Banner form



Electronic Approval Category Rules NTRACAT 7.0 (s4b70)

Approval Category: SPJLD Salary Planner Job Labor Distr

Associated Approval Types

Approval Type	Description	Approval Type Entry Sequence Number	Defaults Exist
SPJBLD	Job Labor Distribution	1	☐

Mandatory Approval Levels

Level Code	Description	Level	Required Action
SUPER	Superuser	99	Apply

Lesson: Assigning Mandatory Approval Levels (Continued)

Jump to TOC

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access the Electronic Approval Category Rule Form (NTRACAT).
2	Double-click in the **Approval Category** field and select an approval Category.
3	Perform a **Next Block** function
4	Double-click in the **Approval Type** field and select an approval type.
5	Enter *1* in the **Approval Type Entry Sequence Number** field.
6	Perform a **Next Block** function.
7	Double-click in the **Level Code** field and enter the level code.
8	Select *Approva*l, *FY*I, or *Appl* in the **Required Action** field.
9	Repeat Step 7 and 8 until you have entered all of the required levels for approval.
10	Click the **Save** icon.
11	Click the **Exit** icon

Section B: Set Up

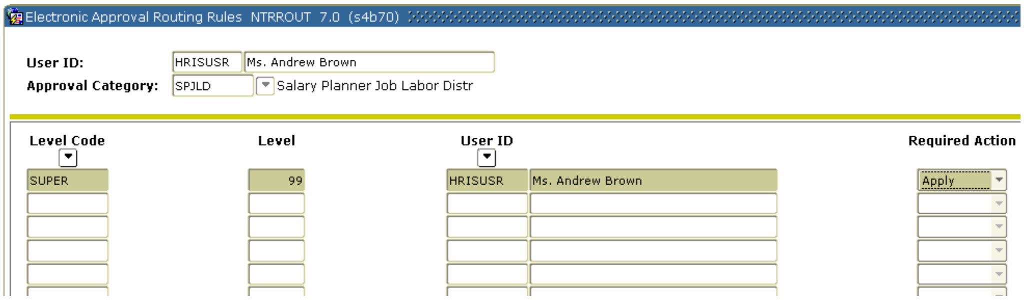
Lesson: Electronic Approvals Routing Rules Form

Jump to TOC

Introduction

Any user with security access that will have to run the upload process (NBPSPUP) will be required to have Electronic Approval Routing Rules set up on NTRROUT for the Approval Categories defined on NTRINST for use with the Salary Planner. Based on the user running the process and the approval category associated with the EPAF, the approval level information set up on NTRROUT will default to the EPAFs created. *Please reference to the Human Resources Electronic Approvals Workbook for more information.*

Banner form



Electronic Approval Routing Rules NTRROUT 7.0 (s4b70)

User ID: HRISUSR Ms. Andrew Brown
Approval Category: SPJLD Salary Planner Job Labor Distr

Level Code	Level	User ID		Required Action
SUPER	99	HRISUSR	Ms. Andrew Brown	Apply

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Electronic Approval Routing Rule Form (NTRROUT).
2	Enter the User ID to be routed in the **User ID** field.
3	Enter the approval category you created in the **Approval Category** field.
4	Select the **Next Block** function or click in the level code frame. Result: The approval levels you created will default in the **Level Code** fields.
5	Select *Approved*, *FYI*, or *Apply* in the **Required Action** field.
6	Repeat **Steps 2-5** as necessary.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section B: Set Up

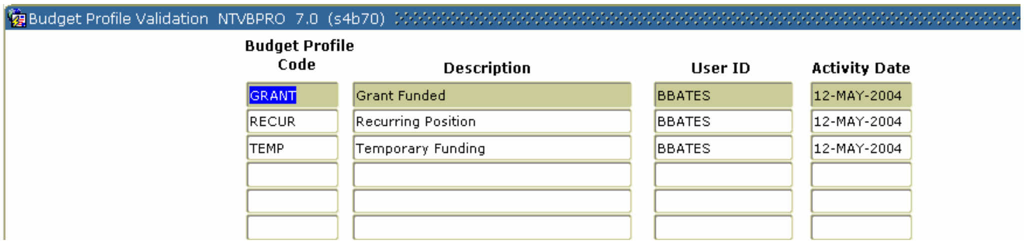
Lesson: Budget Profile Validation Form

◀ Jump to TOC

Purpose

The Budget Profile Validation Form (NTVBPRO) allows you to create budget profile codes and descriptions for use in the Salary Planner application. A Budget Profile is a means for classifying different types of budgets that are used at an enterprise. The budget profiles entered on this form help identify, describe, and associate positions with a specific type of budget on the Position Budget Form (NBAPBUD).

Banner form



Budget Profile Code	Description	User ID	Activity Date
GRANT	Grant Funded	BBATES	12-MAY-2004
RECUR	Recurring Position	BBATES	12-MAY-2004
TEMP	Temporary Funding	BBATES	12-MAY-2004

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access Budget Profile Validation form (NTVBPRO).
2	Enter a 6-character alphanumeric budget profile code to categorize a specific type of budget in the **Budget Profile Code** field.
3	Enter a description of the budget profile code in the **Description** field.
4	Click the **Save** icon. Result: The **User ID** field displays the Banner ID of the employee who last updated the record. The **Activity Date** field displays the date on which the record was last updated.
5	Click the **Exit** icon.

Section B: Set Up

Lesson: Position Budget Form

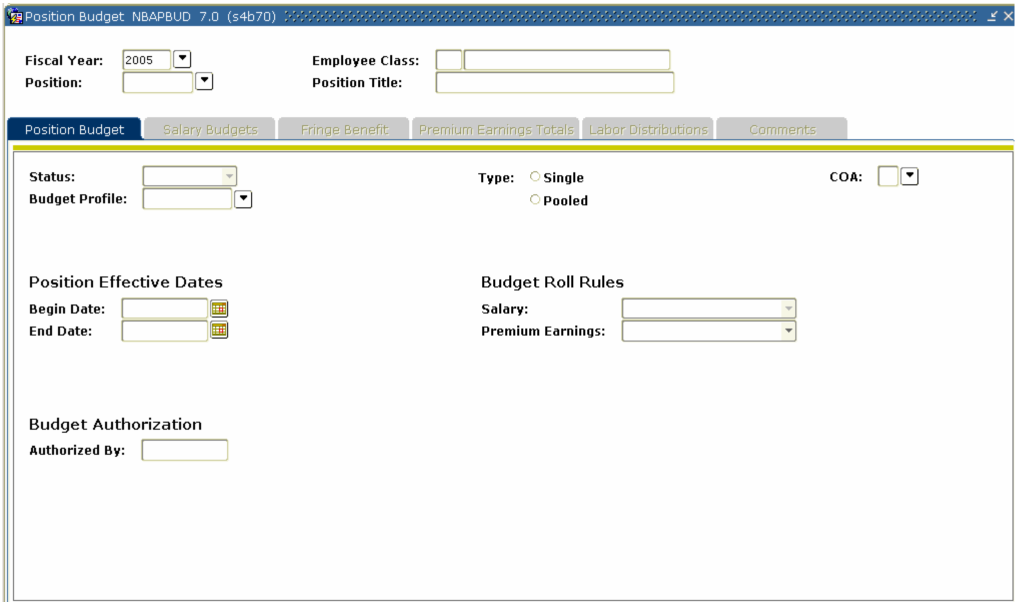
Jump to TOC

Purpose

The Position Budget Form (NBAPBUD) authorizes all positions. It enables you to define position budgets by fiscal year, regular earnings totals (budgeted, encumbered, expended, and remaining), premium earnings totals, fringe benefits, and position labor distributions.

The Budget Profile field has been added that allows you to associate each position with a budget profile in the Main block of the Position Budget Form (NBAPBUD). Only one value may be associated with one position. However, the profile may be changed anytime.

Banner form



Fiscal Year: 2005

Section B: Set Up

Lesson: Position Budget Form (Continued)

Jump to TOC

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Position Budget Form (NBAPBUD).
2	Select the current fiscal year in the **Fiscal Year** field.
3	Select a position in the **Position** field.
4	Select a budget profile code **Budget Profile** field. Note: The entries displayed in the LOV correspond to the profile codes created in the Budget Profile Validation Form (NTVBPRO).
5	Click the **Save** icon.
6	Click the **Exit** icon.

Section B: Set Up

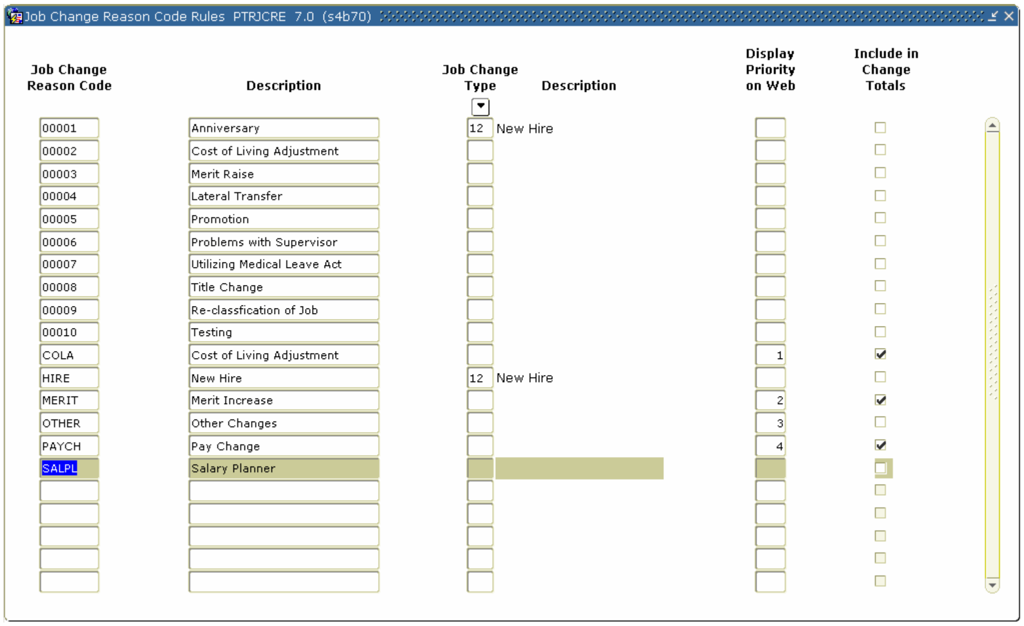
Lesson: Job Change Reason Rule Form

Jump to TOC

Purpose

The Job Change Reason Rule Form (PTRJCRE) indicate the job change reasons that are to be displayed and included in totals in the Salary Planner application, such as Merit or COLA. **Display priority on the Web and Include in Web Totals** fields allow you to specify the priority given to change reason codes and also indicate if these reason codes are to be made available in the Salary Planner. These fields only relate to the Salary Planner application within Employee Self Service.

Banner form



Job Change Reason Code Rules PTRJCRE 7.0 (s4b70)

Job Change Reason Code	Description	Job Change Type	Description	Display Priority on Web	Include in Change Totals
00001	Anniversary	12	New Hire		☐
00002	Cost of Living Adjustment				☐
00003	Merit Raise				☐
00004	Lateral Transfer				☐
00005	Promotion				☐
00006	Problems with Supervisor				☐
00007	Utilizing Medical Leave Act				☐
00008	Title Change				☐
00009	Re-classfication of Job				☐
00010	Testing				☐
COLA	Cost of Living Adjustment			1	☑
HIRE	New Hire	12	New Hire		☐
MERIT	Merit Increase			2	☑
OTHER	Other Changes			3	☐
PAYCH	Pay Change			4	☑
SALPL	Salary Planner				☐
					☐
					☐
					☐
					☐
					☐

Section B: Set Up

Lesson: Job Change Reason Rule Form (Continued)

Jump to TOC

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access the Job Change Reason Rule Form (PTRJCRE).
2	Enter a five character code in the **Job Change Reason Code** field.
3	Enter a description for this code in the **Description** field.
4	Select a job change code in the **Job Change Type** field.
5	Prioritize a change reason code by entering a number in the **Display priority on the Web** field. The Salary Planner Web pages will sort and display the change reason codes in the same sequence order as specified on this form. Note: The Change Reason code assigned a priority of 1 will be the default reason code displayed for an employee on the List by Employee page.
6	Select the **Include in Web Totals** checkbox to indicate whether the amount or percent associated with the Change Reason code is to be included in the totals on the Employee Detail page of the Salary Planner. *Example*: if the employee has the following changes: *Reason Percent Amount Include in Totals* MERIT 2.00 1000.00 Yes COLA 3.00 2000.00 Yes Other 1.5 300.00 No Then, the Total Change Percent is 5.00 and the Total Change Amount is $3,000.00. The $300.00 will not be included in the total change. Note: This indicator controls the computations for percentage and dollar increases reported in the Salary Planner. While a site may not consider some computation components as a part of their increase for the coming fiscal year (such as an FTE change for an employee), this control has no effect on the final Salary Budget loaded to a position or the salary associated with an employee’s job assignment.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Section B: Set Up

Lesson: Salary Planner Extract Rules Form

Jump to TOC

Purpose

Use the Salary Planner Extract Rules Form (NTRSPEX) to identify the population that is to be extracted from Banner into the Salary Planner. The criteria you specify in this rule form are used as the input for the Salary Planner Extract Process (NBPSPEX). The extract population can be identified by specifying one or more of the following factors for inclusion in the extract process:

- Employee Classes
- Bargaining Units
- Budget Profiles

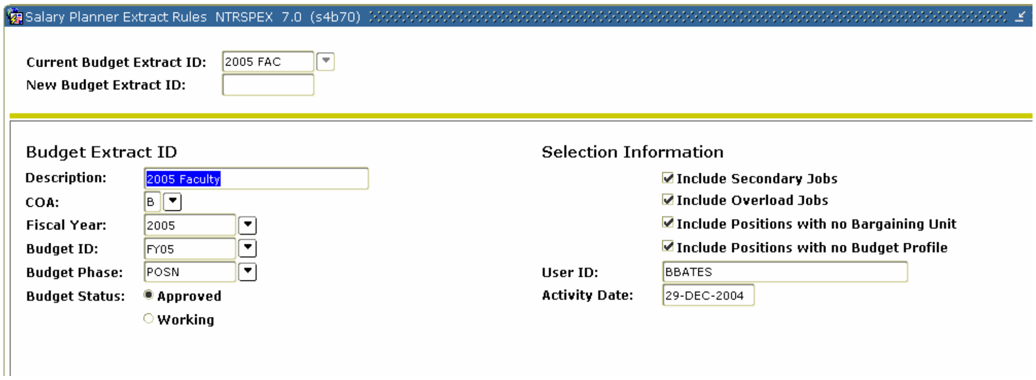
The NTRSPEX form consists of a Key block, a Main block and a window for each of the above. To specify any of the above, select the appropriate choice from the **Options** menu.

Key block

The population criteria for an extract process is grouped and identified by a Budget Extract ID. Specify a new Budget Extract ID in the Key block.

Note: To create a *new* Budget Extract ID *without* copying from an existing Budget Extract ID, specify the new Extract ID in the Current Budget Extract ID field and navigate to the next block. To create a *new* Budget Extract ID *using* the Copy function, specify the new Extract ID in the New Budget Extract ID field.

Banner form



Salary Planner Extract Rules NTRSPEX 7.0 (s4b70)

Current Budget Extract ID: 2005 FAC
New Budget Extract ID:

Budget Extract ID

Description: 2005 Faculty
COA: B
Fiscal Year: 2005
Budget ID: FY05
Budget Phase: POSN
Budget Status: ● Approved ○ Working

Selection Information

☑ Include Secondary Jobs
☑ Include Overload Jobs
☑ Include Positions with no Bargaining Unit
☑ Include Positions with no Budget Profile

User ID: BBATES
Activity Date: 29-DEC-2004

Section B: Set Up

Lesson: Salary Planner Extract Rules Form (Continued)

Jump to TOC

Procedure

Enter details regarding the new Budget Extract ID and specify preliminary selection criteria in this block.

Step	Action
1	Access the Salary Planner Extract Rules Form (NTRSPEX).
2	Enter a budget extract ID in the **Current Budget Extract ID** field to specify new criteria. Note: You can also select an existing Budget Extract ID if you wish to copy population criteria from an existing Budget Extract ID. The corresponding List of Values displays all Budget Extract IDs previously defined on this form. (button) Search Budget Extract ID (NTRSPEX).
3	Enter a new Budget Extract ID in the **New Budget Extract ID** field if you have specified an existing Budget Extract ID in the previous field. Note: The population criteria from the existing Budget Extract ID are copied into the new Budget Extract ID when you select the Copy Record function in the **Options** menu.
4	Perform a **Next Block** function.
5	Enter a short description of the new Budget Extract ID in the **Description** field.
6	Enter or select a Chart of Accounts code in the **COA** field. Note: Search FTVCOAS if *Banner Finance* is installed. This field is disabled if *Banner Finance* is **not** installed.
7	Enter a fiscal year with which the Budget Extract ID is to be associated in the **Fiscal Year** field.
8	Associate a budget ID with the Budget Extract ID in the **Budget ID** field.
9	Associate a phase with the Budget Extract ID in the **Phase** field.
10	Indicate the budget status for the selected budget ID and budget phase by choosing the appropriate radio button in the **Budget Status** field. Note: This is a required field. Options include: *Approved* and *Working*

Lesson: Salary Planner Extract Rules Form (Continued)

Jump to TOC

Procedure, continued

Step	Action
11	Click the **Include Secondary Jobs** checkbox to include secondary jobs in the extract.
12	Click the **Include Overload Jobs** checkbox to include overload jobs in the extract.
13	Click the **Include Positions with no Bargaining Unit** checkbox to include positions with no bargaining units defined in the Position Definition Form (NBAPOSN), in the extract.
14	Click the **Include Positions with no Budget Profile** checkbox to include positions with no budget profile defined on NBAPBUD in the extract.
15	Click the **Save** icon.

Jump to TOC

Options - Employee classes

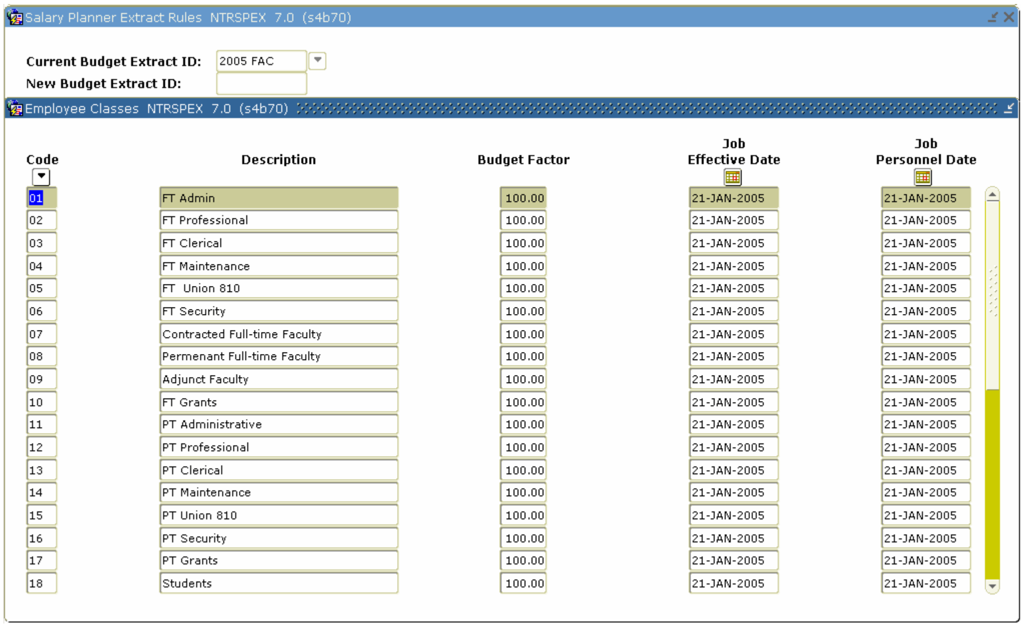
The Employee Classes window allows you to specify employee classes associated with positions on the Position Definition Form (NBAPOSN) that are to be considered by the Budget Extract ID. Access this window from the **Options** menu of NTRSPEX.

Select employee classes using any of the following methods:

Select Include all Employee Classes in the **Options** menu to mass populate this window with all employee classes existing in Banner, and then selectively remove specific employee classes using the **Remove Record** icon.

Select Employee Classes from the **Options** menu to individually select employee classes using the **Search** button in the **Code** field.

Banner form



Current Budget Extract ID: 2005 FAC

New Budget Extract ID:

Code	Description	Budget Factor	Job Effective Date	Job Personnel Date
01	FT Admin	100.00	21-JAN-2005	21-JAN-2005
02	FT Professional	100.00	21-JAN-2005	21-JAN-2005
03	FT Clerical	100.00	21-JAN-2005	21-JAN-2005
04	FT Maintenance	100.00	21-JAN-2005	21-JAN-2005
05	FT Union 810	100.00	21-JAN-2005	21-JAN-2005
06	FT Security	100.00	21-JAN-2005	21-JAN-2005
07	Contracted Full-time Faculty	100.00	21-JAN-2005	21-JAN-2005
08	Permanent Full-time Faculty	100.00	21-JAN-2005	21-JAN-2005
09	Adjunct Faculty	100.00	21-JAN-2005	21-JAN-2005
10	FT Grants	100.00	21-JAN-2005	21-JAN-2005
11	PT Administrative	100.00	21-JAN-2005	21-JAN-2005
12	PT Professional	100.00	21-JAN-2005	21-JAN-2005
13	PT Clerical	100.00	21-JAN-2005	21-JAN-2005
14	PT Maintenance	100.00	21-JAN-2005	21-JAN-2005
15	PT Union 810	100.00	21-JAN-2005	21-JAN-2005
16	PT Security	100.00	21-JAN-2005	21-JAN-2005
17	PT Grants	100.00	21-JAN-2005	21-JAN-2005
18	Students	100.00	21-JAN-2005	21-JAN-2005

Jump to TOC

Procedure

Follow these steps to complete the Employees Classes window.

Step	Action
1	Select Employee Classes from the **Options** menu.
2	Enter or select an Employee Class code in the **Code** field. Result: The **Description** field displays a description of the selected Employee Class code.
3	Enter a budget factor for the specified employee class in the **Budget Factor** field. Note: This percent factor is used in the calculation of an Estimated Fiscal Year Budget amount in the Salary Planner. This factor indicates for what percent of the year the new Annual Salary would apply. The Estimated Fiscal Year Budget is calculated as: (Proposed Annual Salary x Factor) + [(1 - Factor) x Base Salary] For example, Fiscal year is July 1 to June 30. The employee's Base Salary (effective July 1) equals $50,000. His/her Proposed Salary effective September 1) equals $60,000. The factor would be set to 83.33 (10/12). The Estimated Fiscal Year Budget for this job would be $58,333
4	Enter a job effective date for each employee class in the **Job Effective Date** field. Note: This date is utilized to upload data to the job record from the Salary Planner. The first day of the new fiscal year is the default, based on the Chart of Accounts and Fiscal Year entered for the Budget Extract ID, but may be overridden.
5	Enter an effective personnel date for each employee class in the **Job Personnel Date** field. Note: This information is used to upload data to the job record in the Salary Planner. The first day of the new fiscal year is the default, based on the Chart of Accounts and Fiscal Year entered for the Budget Extract ID, but may be overridden.
6	Click the **Save** icon.

Jump to TOC

Options - Bargaining Units

Specify bargaining units to be considered in the extract in this window. Bargaining units can be selected via any of the following methods:

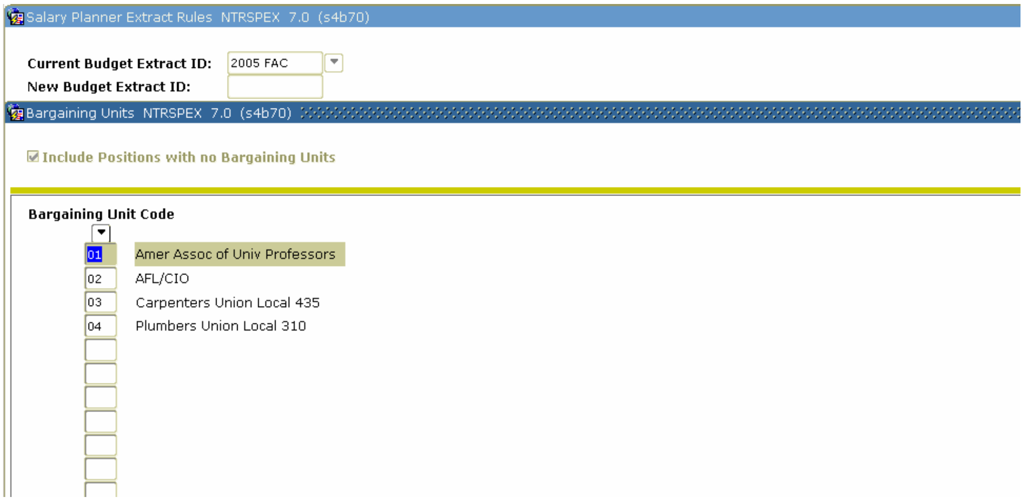
- Select the Include all Bargaining Units from the **Options** menu to populate this window with all bargaining units existing in Banner. Then selectively remove bargaining units that you do not wish to include in the extract by using the **Remove Record** icon.

OR

- Select Bargaining Units from the **Options** menu to individually select only those bargaining units that are to be included in the extract through the List of Values corresponding to the **Bargaining Unit Code** field.

The Include Positions with No Bargaining Units displays the checkbox indicator as marked for the corresponding field in the Main block of NTRSPEX. A check indicates Yes. Unchecked indicates No.

Banner form



Salary Planner Extract Rules NTRSPEX 7.0 (s4b70)

Current Budget Extract ID: 2005 FAC

New Budget Extract ID:

Bargaining Units NTRSPEX 7.0 (s4b70)

☑ Include Positions with no Bargaining Units

Bargaining Unit Code	
01	Amer Assoc of Univ Professors
02	AFL/CIO
03	Carpenters Union Local 435
04	Plumbers Union Local 310

Procedure

Step	Action
1	Select Bargaining Units from the **Options** menu.
2	Select a bargaining unit in the **Bargaining Unit Code** field.

Section B: Set Up

Lesson: Salary Planner Extract Rules Form (Continued)

Jump to TOC

Options - Budget Profile

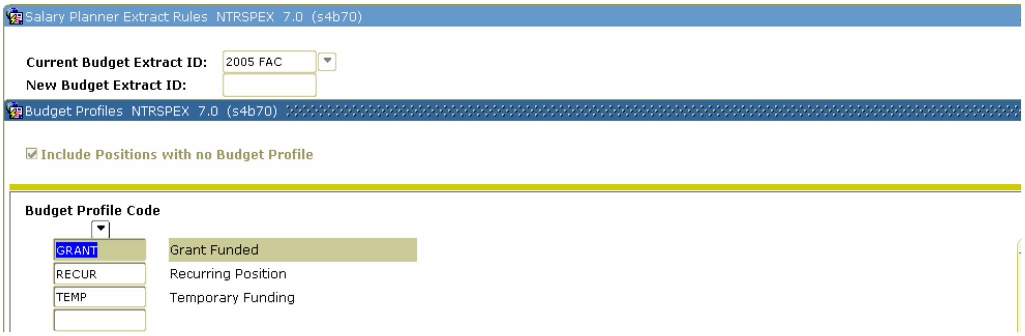
Budget Profile Window specifies budget profiles to be considered by the extract in the Budget Profiles window. Budget Profiles can be selected via any of the following methods:

- Select <u>Include All Budget Profiles</u> from the **Options** menu to populate this window with all budget profiles existing in Banner, and then selectively remove budget profiles that you do not wish to include in the extract by using the **Remove Record** icon.

OR

- Select <u>Budget Profiles</u> from the **Options** menu to individually select only those budget profiles that are to be included in the extract using the LOV corresponding to the Budget Profile code field. Double-click to access the LOV in the Budget Profile code field.

Banner form



Current Budget Extract ID: 2005 FAC

New Budget Extract ID:

☑ Include Positions with no Budget Profile

Budget Profile Code	
GRANT	Grant Funded
RECUR	Recurring Position
TEMP	Temporary Funding

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Select <u>Budget Profiles</u> from the **Options** menu. <u>Note</u>: The **Include Positions with No Budget Profiles** checkbox displays the check box indicator as marked for the corresponding field in the Main block of NTRSPEX. A check indicates Yes. Unchecked indicates No.
2	Enter a budget profile code in the **Budget Profile Code** field.
3	Click the **Save** icon.
4	Click the **Exit** icon.

Section B: Set Up

Lesson: Running the NSPACAT.SQL script

Jump to TOC

Introduction

In addition to Security and Banner form set-up, your database administrator should run the script, NSPACAT.SQL. This will create the following approval types:

- Salary
- Default HRS
- Labor Distribution

This will also assign Approval Categories. This script has been developed specifically to enable the Salary Planner Upload process (NBPSPUP) to create EPAFs when data is uploaded back into Banner from the Salary Planner. Once the script is run, the approval categories will be established in the Installation Rule Form (NTRINST), Salary Planner window.

Please refer to Human Resources release guide 6.0 for additional information.

Section B: Set Up

Lesson: Establishing Access to the Salary Planner Menu

Jump to TOC

Introduction

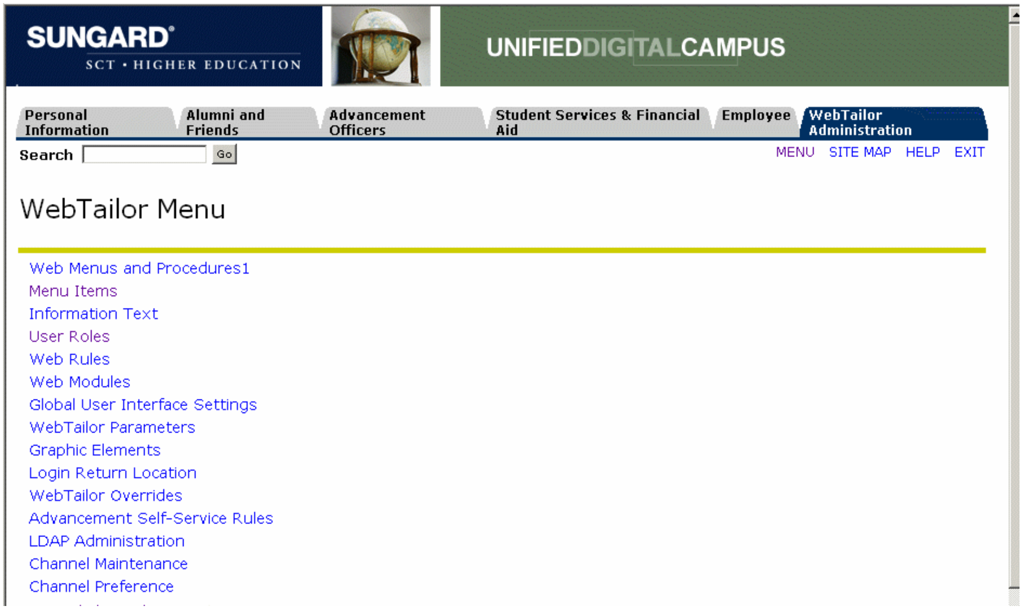
Within Web Tailor, roles are used to determine Web Page Access within the Employee Self Service-Salary Planner Application. Banner Human Resources application level security is used to determine data access within the web pages

To implement the Salary Planner in Employee Self-Service, the Web Tailor Administrator at your enterprise has to perform following tasks:

Establish access to the Salary Planner menu in Employee Self Service This task only has to be performed if you have customized the Employee Self-Serve Main Menu. Otherwise, proceed to step 2.

Define the role of each user in the Salary Planner.

Screen image



Section B: Set Up

Lesson: Establishing Access to the Salary Planner Menu (Continued)

Jump to TOC

Procedure

Follow these steps to complete the process.

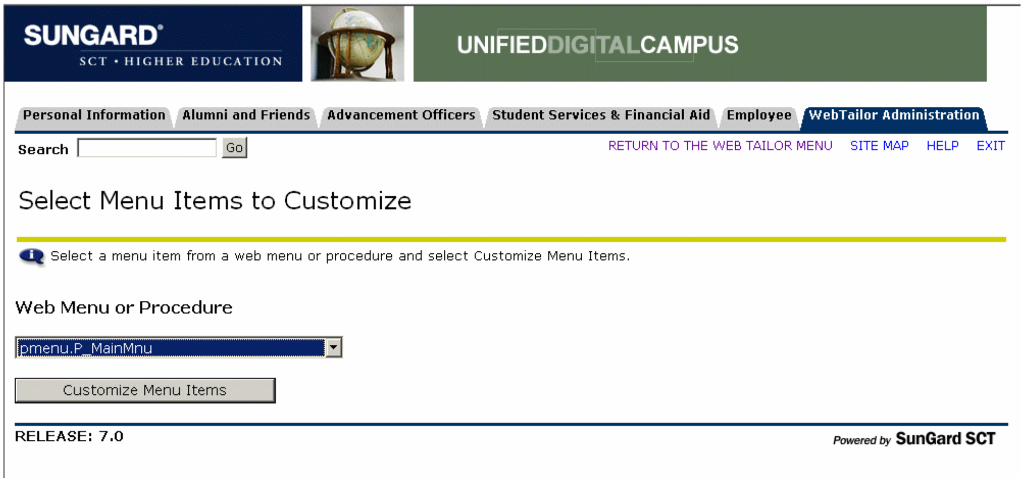
Note: Apply the following steps if you have customized the Employee Self Service main menu and no longer have access to the Salary Planner link on the Employee Self Service menu.

After completing the install, complete the following steps.

Step	Action
1	Log on to Employee Self-Service with an ID that has access to WebTailor Administration.
2	Select the **Web Tailor Administration** menu.
3	Select **Menu Items.**
4	Select the Web menu, **pmenu.p_MainMnu**, from the drop-down list.
5	Select the **Customize Menu Items** button Note: You will see a list of menu entries for the Employee Main Menu. If at least one LOCAL entry is displayed then continue with the following steps. Otherwise, exit Employee Self-Service making *no* changes, and proceed to assign roles to Salary Planner users.
6	Select the **Add a New Menu Item** button.
7	On the Create a New Menu Item page, enter the following information: • Select the **Submit Changes** button • Follow the instructions outlined in the topic, *Assigning Roles to Salary Planner Users.*
8	Log on the Employee Self-Service as a Salary Planner user. The Salary Planner menu should be listed under the Employee Main Menu. Note: All Web packages and Web procedures specific to the Salary Planner are delivered as seed data by SunGard Higher Education. For a complete list of all packages/procedures delivered for the Salary Planner, refer to the topic, *New Web Procedures.*

Jump to TOC

Screen image



Select Menu Items to Customize

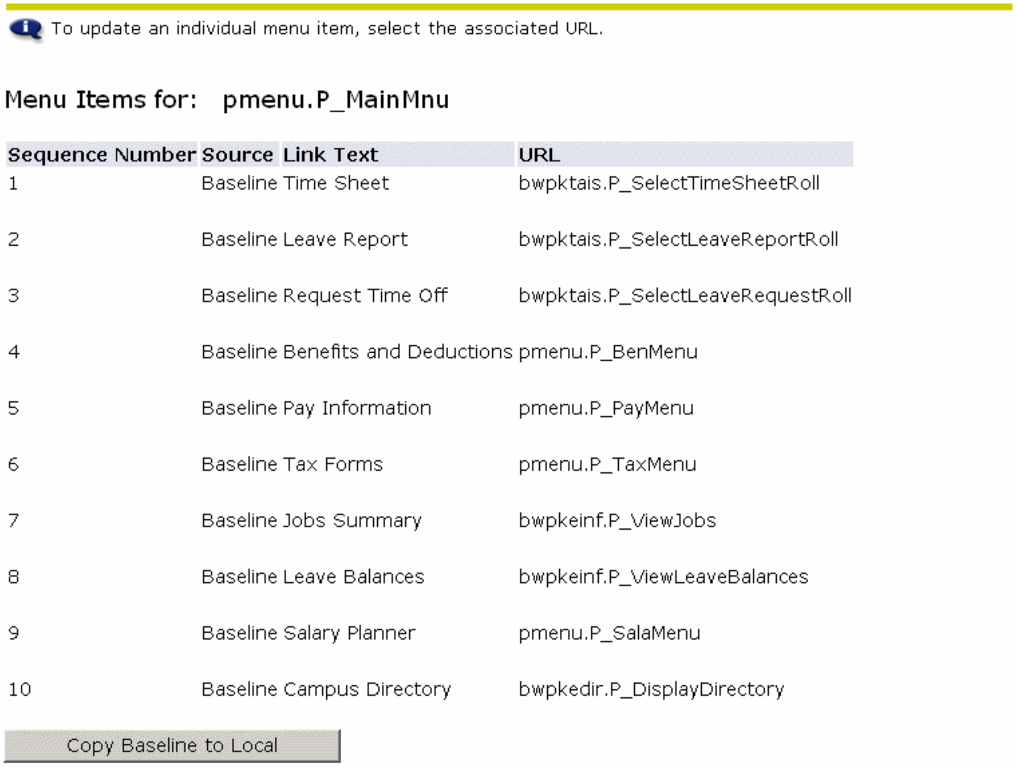
Select a menu item from a web menu or procedure and select Customize Menu Items.

Web Menu or Procedure

pmenu.P_MainMnu

RELEASE: 7.0

Screen image



To update an individual menu item, select the associated URL.

Menu Items for: pmenu.P_MainMnu

Sequence Number	Source	Link Text	URL
1		Baseline Time Sheet	bwpktais.P_SelectTimeSheetRoll
2		Baseline Leave Report	bwpktais.P_SelectLeaveReportRoll
3		Baseline Request Time Off	bwpktais.P_SelectLeaveRequestRoll
4		Baseline Benefits and Deductions	pmenu.P_BenMenu
5		Baseline Pay Information	pmenu.P_PayMenu
6		Baseline Tax Forms	pmenu.P_TaxMenu
7		Baseline Jobs Summary	bwpkeinf.P_ViewJobs
8		Baseline Leave Balances	bwpkeinf.P_ViewLeaveBalances
9		Baseline Salary Planner	pmenu.P_SalaMenu
10		Baseline Campus Directory	bwpkedir.P_DisplayDirectory

Section B: Set Up

Lesson: Assigning Roles to Salary Planner Users

Jump to TOC

Introduction

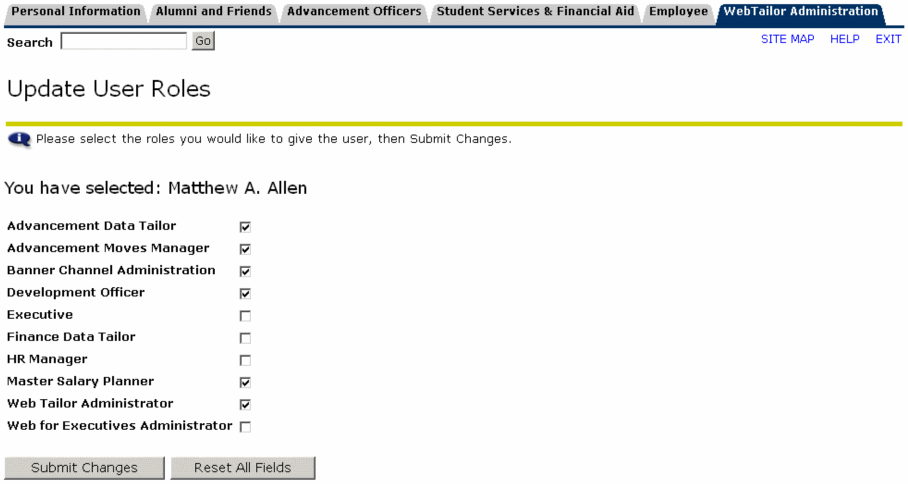
Two types of users can access the Salary Planner. Each user type is identified by their role in the Salary Planner. These include:

- Master Salary Planners
- HR Managers

Note: Master Salary Planners have all the privileges of the HR Manager role, plus the ability to create scenarios and edit the *Initial* scenario. Therefore, it is not necessary to assign the HR Manager role to a user who has the Master Salary Planner role.

Procedure

Follow these steps to define the role of each user in the Salary Planner and access the WebTailor application.

Step	Action
1	Log on to Employee Self-Service with your WebTailor Administrator **ID** and **Password**.
2	Select the **WebTailor Administration** menu.
3	Select the **User Roles** menu option.
4	Enter the **ID** of the employee who is to be assigned the user role and select **Submit**.
5	Click the **HR Manager** and/or **Master Salary Planner** checkbox on the Update User Roles page to assign the employee a roles in the Salary Planner.  Update User Roles Please select the roles you would like to give the user, then Submit Changes. You have selected: Matthew A. Allen Advancement Data Tailor ☑ Advancement Moves Manager ☑ Banner Channel Administration ☑ Development Officer ☑ Executive ☐ Finance Data Tailor ☐ HR Manager ☐ Master Salary Planner ☑ Web Tailor Administrator ☑ Web for Executives Administrator ☐
6	Select the **Submit Changes** button.

Section B: Set Up

Lesson: Self Check

Jump to TOC

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

Match the forms in Column A to the descriptions in Column B by writing the letter from Column A in the space provided.

	Column A: Forms		Column B: Descriptions
a.	Organization Code Validation Form	_____	1. Enables you to identify rules that apply throughout your institution and establish then in the database at an installation level.
b.	Organization Code Maintenance Form	_____	2. Specifies which organization code ranges can be viewed by each user.
c.	Position Control Installation Rule Form	_____	3. Specifies which employee class codes can be viewed by each user.
d.	Installation Rule Form	_____	4. Used to set up an organizational hierarchy when Banner Finance is not installed.
e.	User Codes Rule Form	_____	5. Contains overall rules for processing items in Position Control and setting controls for Electronic Approvals.
f.	Employer Security Form	_____	6. Enables you to create and maintain employer security by users.
g.	Employee Class Security Form	_____	8. Used to set up an organizational hierarchy when Banner Finance is installed.
h.	Organization Security Form	_____	9. Establishes user IDs for security purposes.
i.	Salary Planner Security Form	_____	11. Organization security should be specified on this form for all Salary Planner users who have been given either Query or None access in the Salary Planner Master Organization field in PTRUSER.

Jump to TOC

Question 2

Match the forms in Column A to the descriptions in Column B by writing the letter from Column A in the space provided.

Column A: Forms		**Column B: Descriptions**
a. Electronic Approval Category Rules Form	_____	1. This form authorizes all positions.
b. Electronic Approvals Routing Form	_____	2. This will create Approval Types, Salary, Default HRS, Labor Distribution, and assign Approval Categories.
c. Budget Profile Validation Form	_____	3. Assign mandatory approval levels on this form for the approval categories defined from the NSPACAT.SQL script.
d. Position Budget Form	_____	4. Allows you to create budget profile codes and descriptions for use in the Salary Planner application.
e. Job Change Reason Rule Form	_____	5. Identifies the population that is to be extracted from Banner into Salary Planner.
f. Salary Planner Extract Rules Form	_____	6. Set up rules on this form for the approval categories defined on NTRINST for use the Salary Planner.
g. NSPACAT.SQL	_____	7. On this form, indicate the job change reasons that are to be displayed and included in totals in the Salary Planner application.

Question 3

The Web Tailor Administrator at your institution must define the role of each user in the Salary planner to implement the Salary Planner in Employee Self Service.

True or False

Question 4

What are the two types of users that can access Salary Planner?

Section B: Set Up

Lesson: Answer Key for Self Check

◀ Jump to TOC

Question 1

Match the forms in Column A to the descriptions in Column B by writing the letter from Column A in the space provided.

Column A: Forms		**Column B: Descriptions**
a. Organization Code Validation Form	**d**	1. Enables you to identify rules that apply throughout your institution and establish then in the database at an installation level.
b. Organization Code Maintenance Form	**h**	2. Specifies which organization code ranges can be viewed by each user.
c. Position Control Installation Rule Form	**g**	3. Specifies which employee class codes can be viewed by each user.
d. Installation Rule Form	**a**	4. Used to set up an organizational hierarchy when Banner Finance is not installed.
e. User Codes Rule Form	**c**	5. Contains overall rules for processing items in Position Control and setting controls for Electronic Approvals.
f. Employer Security Form	**f**	6. Enables you to create and maintain employer security by users.
g. Employee Class Security Form	**b**	8. Used to set up an organizational hierarchy when Banner Finance is installed.
h. Organization Security Form	**e**	9. Establishes user IDs for security purposes.
i. Salary Planner Security Form	**i**	11. Organization security should be specified on this form for all Salary Planner users who have been given either Query or None access in the Salary Planner Master Organization field in PTRUSER.

Jump to TOC

Question 2

Match the forms in Column A to the descriptions in Column B by writing the letter from Column A in the space provided.

Column A: Forms		**Column B: Descriptions**
a. Electronic Approval Category Rules Form	**d**	1. This form authorizes all positions.
b. Electronic Approvals Routing Form	**g**	2. This will create Approval Types, Salary, Default HRS, Labor Distribution, and assign Approval Categories.
c. Budget Profile Validation Form	**e**	3. Assign mandatory approval levels on this form for the approval categories defined from the NSPACAT.SQL script.
d. Position Budget Form	**a**	4. Allows you to create budget profile codes and descriptions for use in the Salary Planner application.
e. Job Change Reason Rule Form	**c**	5. Identifies the population that is to be extracted from Banner into Salary Planner.
f. Salary Planner Extract Rules Form	**f**	6. Set up rules on this form for the approval categories defined on NTRINST for use the Salary Planner.
g. NSPACAT.SQL	**b**	7. On this form, indicate the job change reasons that are to be displayed and included in totals in the Salary Planner application.

Question 3

The Web Tailor Administrator at your institution must define the role of each user in the Salary planner to implement the Salary Planner in Employee Self Service.

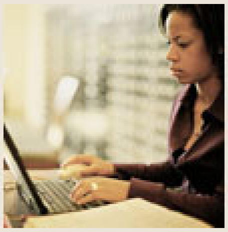
True

Jump to TOC

Question 4

What are the two types of users that can access Salary Planner?

Master Salary Planner
HR Managers



Section C: Day-to-Day Operations

Lesson: Overview

Jump to TOC

Introduction

The goal of this workbook is to provide you with the knowledge and practice to define, edit, and update position budgets and job salaries for a select population through the Employee Self Service Web.

Intended audience

Human Resources Administrators, Human Resources Office Staff, and Budget Administrators.

Objectives

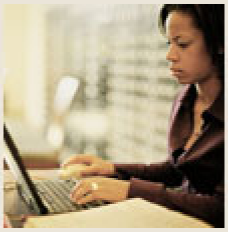
At the conclusion of the training and consulting session, you will be able to perform the following functions within Banner Human Resources

- extract data from Banner
- create position budget scenarios
- copy position budget scenarios
- edit position budget scenarios
- perform multiple query extracts
- upload the modified data into Banner.

Prerequisites

You should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals” or have equivalent experience navigating in the Banner system
- completed the Human Resources Overview training workbook
- completed Position Control and Budgeting training workbook
- completed Employment and Compensation training workbook
- completed Self Service for Employees training workbook
- completed Biographic/Demographic training workbook
- administrative rights to create the rules and set the validation codes in Banner
- Banner HR fully implemented or near the end of the implementation.

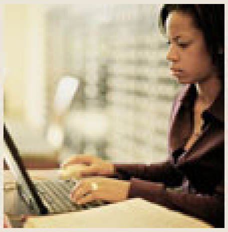


Section C: Day-to-Day Operations

Lesson: Overview (Continued)

Jump to TOC

Section contents



Section C: Day-to-Day Operations

Lesson: Process Introduction

Jump to TOC

Introduction

Run the Salary Planner Extract Process (NBPSPEX) in Banner HR to download the budget extract into the Salary Planner for a specific Budget Extract ID.

The Salary Planner menu provides the following five options:

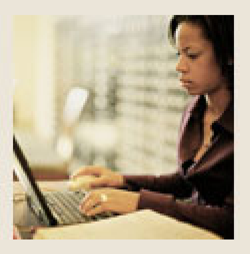
- Create Scenario
- Copy Scenario
- Edit Scenario
- Organization Locks
- Multiple Query Extracts

Notes: Access to the web pages and display of information depends on the Salary Planner role assigned to each user in WebTailor and the type of access assigned on the applicable security forms for the salary planner (i.e. NSASPSC, PTRUSER, PSAECLS and PSAEMPR).

The Create Scenario menu option is *not* available to HR Managers. This option is used by a Master Salary Planner only to create copies of the *Initial* Scenario.

Updates to Banner

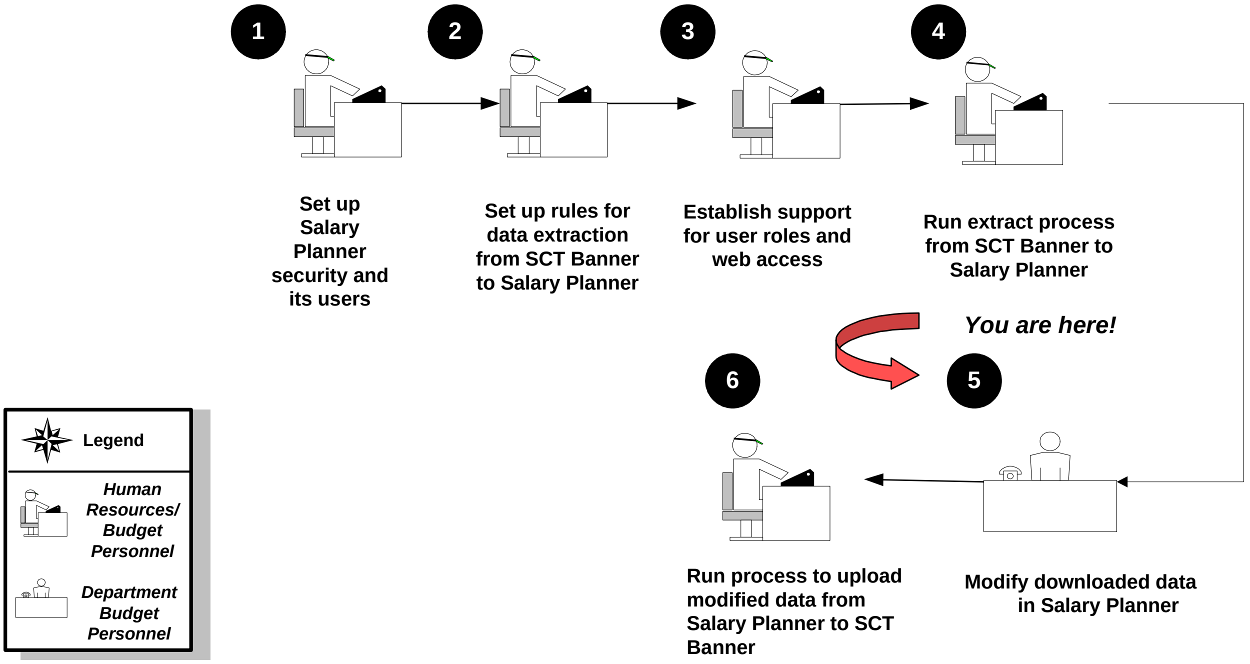
The Self Service web pages do **not** make any updates to Banner. Once your organization has reviewed the scenarios and approved a scenario, you would run the Salary Planner Upload Process (NBPSPUP) to load the approved scenario into Banner.



Jump to TOC

Flow diagram

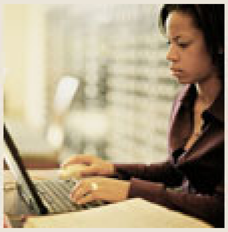
This diagram highlights the processes for using Salary Planner.



What happens

The stages of the process are described in this table.

Stage	Description
Human Resources/Budget Personnel	
1	Sets up security for the Salary Planner and each of its users in Banner.
2	Sets up rules to extract data from Banner into the Salary Planner with NTRSPEX.
3	Establishes support for user roles and access to the relevant Web pages in WebTailor.
4	Runs the NBPSPEX process to extract data from Banner into the Salary Planner.
Department Budget Personnel	
5	Modifies the downloaded data in the Salary Planner.
Human Resources/Budget Personnel	
6	Runs the NBPSPUP process to upload modified data from the Salary Planner into Banner.



Section C: Day-to-Day Operations

Lesson: Salary Planner Extract Process (NBPSPEX)

Jump to TOC

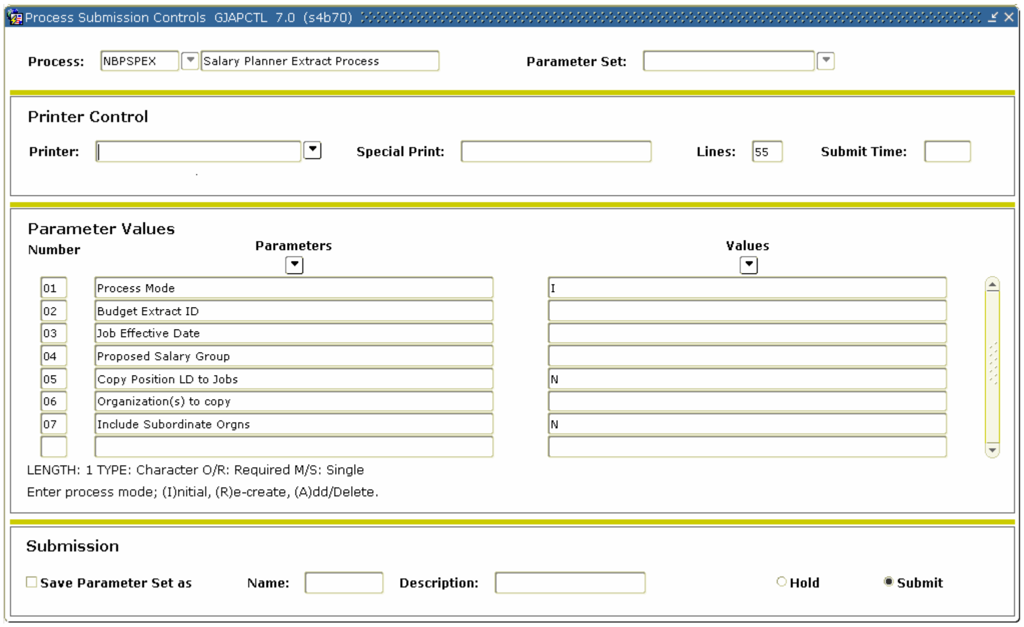
Purpose

The Salary Planner Extract Process (NBPSPEX) extracts data from Banner to the Salary Planner application in Employee Self- Service. The extracted data in the Salary Planner is transferred from Banner tables to a group of working budget tables in the Salary Planner. The extracted data is given the Scenario name as *Initial*, and can only be viewed or modified by a Master Salary Planner.

Notes: Any user of Banner HR can run this extract process. However, your Database Administrator can restrict it to only Salary Planner users through the Oracle Role Security set up.

All Master Salary Planners must have their **Salary Planner Master Organization** security enabled in the User Codes Rule Form (PTRUSER). The NBPSPEX process can be run in three different modes: (I)nitial, (R)e-create, and (A)dd/Delete modes.

Banner form



Process Submission Controls GJAPCTL 7.0 (s4b70)

Process: NBPSPEX Salary Planner Extract Process **Parameter Set:**

Printer Control

Printer: **Special Print:** **Lines:** 55 **Submit Time:**

Parameter Values

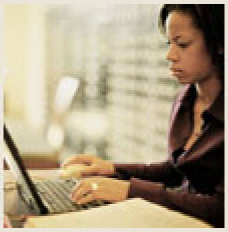
Number	Parameters	Values
01	Process Mode	I
02	Budget Extract ID	
03	Job Effective Date	
04	Proposed Salary Group	
05	Copy Position LD to Jobs	N
06	Organization(s) to copy	
07	Include Subordinate Orgns	N

LENGTH: 1 TYPE: Character O/R: Required M/S: Single

Enter process mode; (I)nitial, (R)e-create, (A)dd/Delete.

Submission

☐ **Save Parameter Set as** **Name:** **Description:** ○ **Hold** ● **Submit**



Jump to TOC

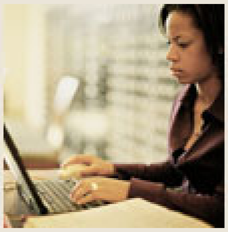
Procedure

Follow these steps to complete the report.

Step	Action
1	Access the Salary Planner Extract Process (NBPSPEX).
2	Enter the desired printer name in the **Printer** field. Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3	Enter these parameter values.

Parameter	Description
01: Process Mode	Enter process mode- I(nitial), R(recreate) or A(dd/delete). Defaults to I(nitial).
02: Budget Extract ID	Enter the Budget Extract ID.
03: Job Effective Date	Enter today's date.
04: Proposed Salary Group	Select a salary group using the Values list.
05: Copy Position LD to Jobs	Defaults to N.
06: Organizations to Copy	Enter Position Budget Organization codes. Required if Copy Position LD to Jobs is set to Y(es). Enter *%* for all.
07: Include Subordinate Orgns	Required if Copy Position LD to Jobs is set to Y(es). Enter *Y* for yes or *N* for no.

4	Click the **Save Parameter Set as** checkbox.
5	Enter a name and description in the **Name** and **Description** fields.
6	Click the **Submit** radio button.
7	Click the **Save** icon to execute the report. Result: The Auto hint line displays the job submission number for the report log and list file.
8	Select **Review Output** on the Options menu to review the report.
9	Click the **Exit** icon.



Section C: Day-to-Day Operations

Lesson: Creating a Scenario

Jump to TOC

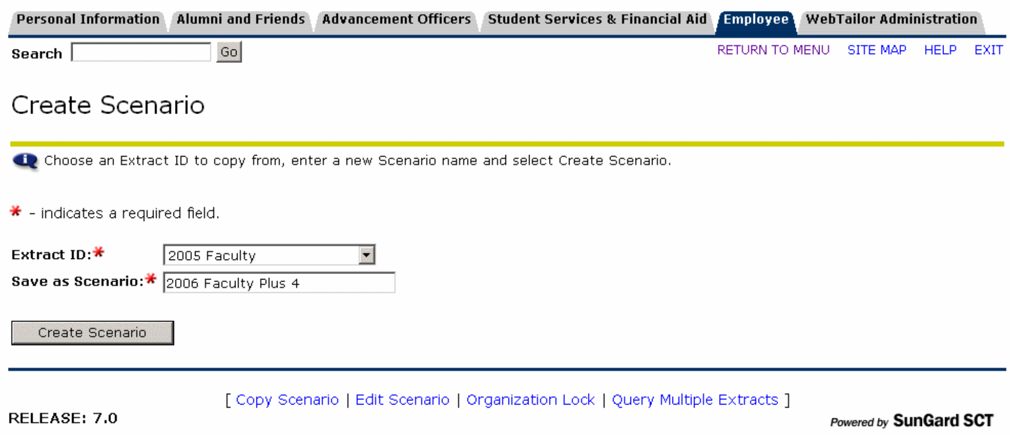
Introduction

Once you have extracted data in Banner, the Master Salary Planners can use the Employee Self Service web to create scenarios. The Create Scenario Web page is displayed upon selecting the **Create Scenario** menu option in the Salary Planner menu.

Note: This menu option and Web page is accessible only to those employees who have been designated as Master Salary Planners in the WebTailor application.

Master Salary Planners can create *new* scenarios that are available for HR Managers to review and edit. Each new scenario is an exact duplicate of the *Initial* scenario that was created by the extract process. The new scenario is identified by means of a *unique* scenario name assigned by the Master Salary Planner during the Create Scenario process. All organizations in the new scenario are created with an Unlocked status.

Screen image



Create Scenario

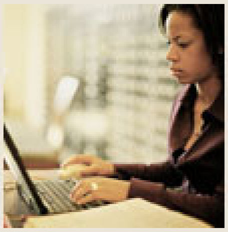
Choose an Extract ID to copy from, enter a new Scenario name and select Create Scenario.

* - indicates a required field.

Extract ID:* 2005 Faculty

Save as Scenario:* 2006 Faculty Plus 4

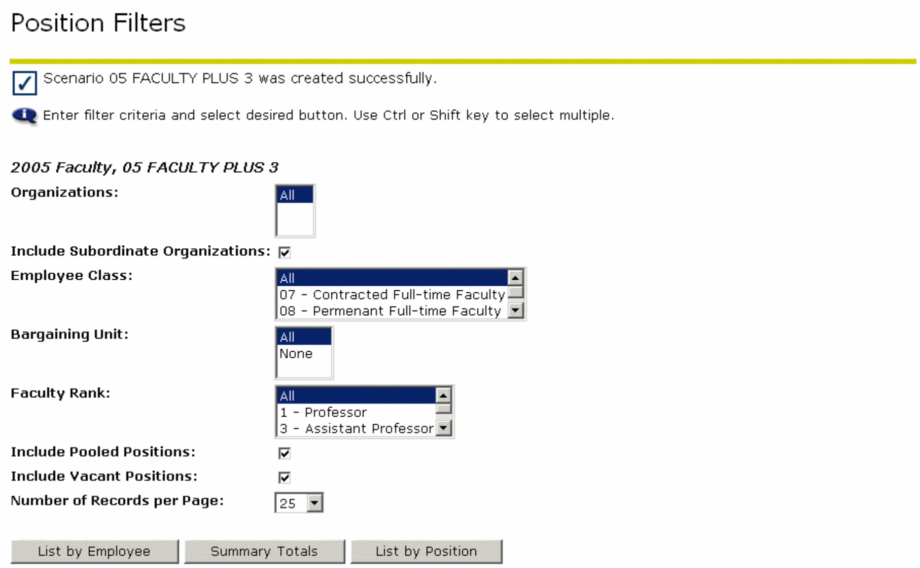
Note: The information text provides instructions for using this Web page. You can customize the text using WebTailor. The delivered text is: *Choose an Extract ID to copy from, enter a new Scenario name and select Create Scenario.*

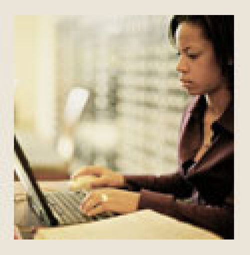


Jump to TOC

Procedure

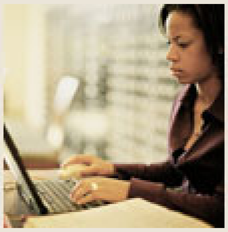
Follow these steps to complete the process.

Step	Action
1	Access the Banner Self Service website.
2	Select the **Enter Secure Area** link.
3	Enter your user ID in the **User ID** field.
4	Enter your PIN number in the **PIN** field.
5	Click the **Login** button.
6	Select the **Employee** link on the Main Menu page.
7	Select the **Salary Planner** link on the Employee page.
8	Select the **Create Scenario** link on the Salary Planner page.
9	Select an extract ID in the **Extract ID** field.
10	Enter a name for the new scenario in the **Save as Scenario** field.
11	Click the **Create scenario** button. <u>Result</u>: The Position Filters page opens.  Position Filters ✓ Scenario 05 FACULTY PLUS 3 was created successfully. Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple. *2005 Faculty, 05 FACULTY PLUS 3* Organizations: All Include Subordinate Organizations: ☑ Employee Class: All 07 - Contracted Full-time Faculty 08 - Permanent Full-time Faculty Bargaining Unit: All None Faculty Rank: All 1 - Professor 3 - Assistant Professor Include Pooled Positions: ☑ Include Vacant Positions: ☑ Number of Records per Page: 25



Procedure, continued

Step	Action
12	Select multiple organizations in the **Organization** field by using the CTRL or the SHFT keys. Note: This field displays a list of all organizations to which Salary Planner users have either update or query access based on their Organization security established in Banner HR.
13	Click the **Include Subordinate Organizations** checkbox to copy data from any subordinate organization belonging to a predecessor organization selected in the **Organization** field. The organization hierarchy has to be previously established in: PTVORGN-If *Banner Finance* is *not* installed. FTMORGN-If *Banner Finance* is installed.
14	Select one or more Employee Classes from the drop-down list, using the CTRL + SHIFT key in the **Employee Class** field.
15	Select one or more Bargaining Units from the drop-down list using the CTRL + SHIFT key in the **Bargaining Unit** field.
16	Select one or more Faculty Rank codes from the drop-down list using the CTRL + SHIFT key in the **Faculty Rank** field.
17	Click the **Include Pooled Positions** checkbox to include pooled positions that have been included in the extract. Otherwise, only single positions will be included. Note: Pooled refers to the attribute set on the Position Budget Form (NBAPBUD) and generally refers to those positions that would have more than one person associated with them.
18	Click the **Include Vacant Positions** checkbox to include any vacant positions that were included by the extract.
19	Select a number from the drop-down list in the Number of Records per Page field to indicate your choice for the number of records that are to be displayed in the resulting Web page.
20	Click the **List by Employee** button to view your scenario listed by employee.
21	Click the **Summary Totals** link to view a summary of your scenario.
22	Click the **List by Position** link to view a list by position.
23	Select the **Return to Menu** link.



Section C: Day-to-Day Operations

Lesson: Copying a Scenario

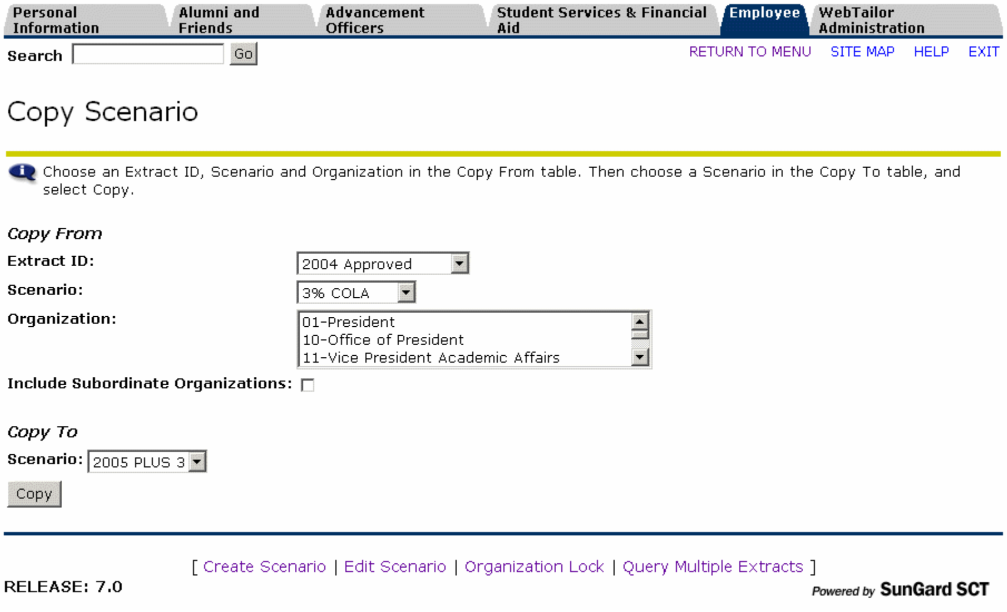
Jump to TOC

Introduction

The Copy Scenario page allows Salary Planner users to copy data from one scenario to another. HR Managers and Master Salary Planners can use this functionality to copy all changes from one scenario to another.

Records belonging to a locked organization can be copied from, but data cannot be copied into a scenario whose organizations are locked unless the user has access to the predecessor organization, and the predecessor is unlocked. When records are copied for an organization, the organization’s Locked status in the destination scenario will always default to Unlocked.

Screen image



Copy Scenario

Choose an Extract ID, Scenario and Organization in the Copy From table. Then choose a Scenario in the Copy To table, and select Copy.

Copy From

Extract ID: 2004 Approved

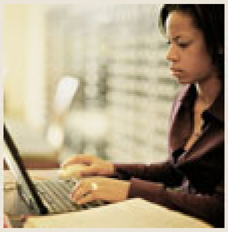
Scenario: 3% COLA

Organization:
01-President
10-Office of President
11-Vice President Academic Affairs

Include Subordinate Organizations: ☐

Copy To

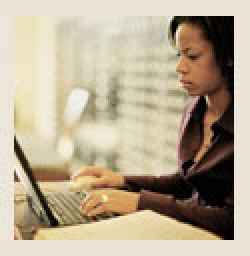
Scenario: 2005 PLUS 3



Procedure

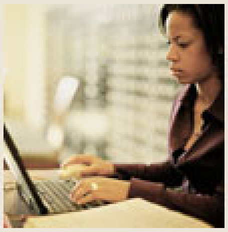
Follow these steps to copy data from one scenario to another.

Step	Action
1	Select the **Copy Scenario** link from the Salary Planner menu.
2	Select a source scenario in the **Copy From Extract ID** field. Note: The list displayed here depends on the user's access to organizations established by his/her organization security.
3	Select a scenario in the **Scenario** field. Note: Displays a list of all scenarios associated with an Extract ID in alphanumeric order, regardless of their lock status. *Initial* scenarios will *not* be included in this list.
4	Select an organization in the **Organization** field. Notes: Displays a list of all organizations to which Salary Planner users have update access, based on their Organization security. Select multiple organizations by using the CTRL or SHFT keys.
5	Click the **Include Subordinate Organizations** checkbox to copy data from the subordinate organizations belonging to a predecessor organization selected in the **Organization** field. Note: Only data for those organizations to which the user has update access will be copied. The organization hierarchy has to be previously established in: PTVORGN: If *Banner Finance* is *not* installed. FTMORGN: If *Banner Finance* is installed.
6	Specify a destination scenario in the **Copy To Scenario** field.



Procedure, continued

Step	Action
7	Select the **Copy** button. Note: All types of security (Organization, Employee Class, etc.) are applied to the copy process. *Example:* if a user has access to only 1 Employee Class then only positions in that Employee Class and their associated jobs will be copied.
8	Click **OK** in the "Do you wish to make a copy of the data to the selected destination scenario?" pop-up box. Result: The scenario is copied to the new scenario name.
9	Click the **Return to Menu** link.



Section C: Day-to-Day Operations

Lesson: Editing a Scenario

Jump to TOC

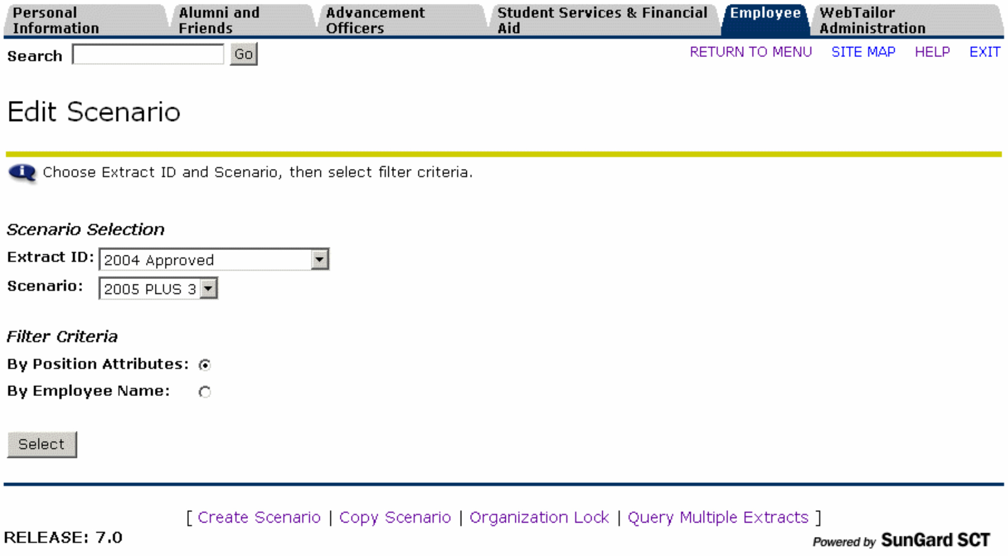
Introduction

The Edit Scenario page can be accessed by *all* users of the Salary Planner application. Master Salary Planner and HR Manager users use this page to select a Budget Extract ID and Scenario for viewing/editing.

This page displays a list of all budget extracts and scenarios that have been created. However, only Master Salary Planners will have access to the *Initial* scenario. HR Managers can edit only those scenarios that have been created by the Master Salary Planner.

<u>Note</u>: It is important to note that new budget scenarios cannot be created on this Web page. This functionality is available only in the Create Scenario page.

Screen image



Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID: 2004 Approved

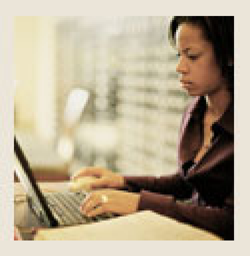
Scenario: 2005 PLUS 3

Filter Criteria

By Position Attributes: ●

By Employee Name: ○

RELEASE: 7.0



Section C: Day-to-Day Operations

Lesson: Editing a Scenario (Continued)

Jump to TOC

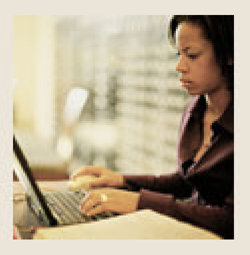
Procedure

Follow these steps to edit a scenario.

Step	Action
1	Select the **Edit Scenario** link.
2	Select a Budget Extract ID to edit in the **Extract ID** field. <u>Notes</u>: Displays the Ids of available Budget Extracts downloaded from Banner HR via the Budget Extract Process (NBPSPEX) in a drop-down list. Master Salary Planners can see all downloaded budget extracts.
3	Select a scenario to extract in the **Scenario** field. <u>Note</u>: Master Salary Planners see the *Initial* scenario listed as an entry in the pull-down list. This option will not be listed for HR Managers.
4	Specify the filter criteria to be used to select data within the Extract ID – Scenario. Options include:

Radio button	**Description**
By Position Attributes	Records may be filtered by Position attributes. For example, by Organization, Employee Class, Bargaining Unit, etc. Continue to next step.
By Employee Name	Records may be filtered by Employee name or ID. See next lesson “Employee Filter” for more information.

5	Click the **Select** button. <u>Result</u>: The Position Filters window opens.



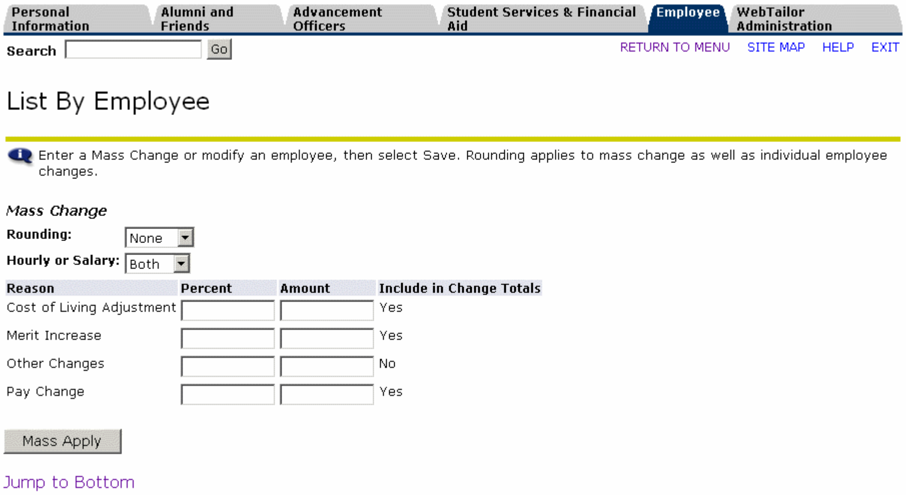
Jump to TOC

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

Click the **List by Employee** button to view your scenario listed by employee.

Result: The List by Employee window opens where you can enter data to change the scenario. *For more detailed discussion of this window, see the List by Employee lesson on page C-20.*



List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

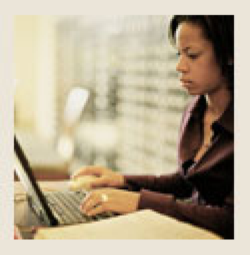
Mass Change

Rounding: None

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Cost of Living Adjustment			Yes
Merit Increase			Yes
Other Changes			No
Pay Change			Yes

</td></tr>
<tr><td>7</td><td>Select a rounding method in the Rounding field.</td></tr>
<tr><td>8</td><td>Select the type of positions to be affected in the Hourly or Salary field.</td></tr>
<tr><td>9</td><td>Enter an amount in the Cost of Living Adjustment Percent or Amount field.</td></tr>
<tr><td>10</td><td>Enter an amount in the Merit Increase Percent or Amount field.</td></tr>
<tr><td>11</td><td>Click the Mass Apply button.</td></tr>
<tr><td>12</td><td>Scroll through the page to view changes by employee.</td></tr>
<tr><td>13</td><td>Click the Jump to Bottom link to view summary information.</td></tr>
</table>



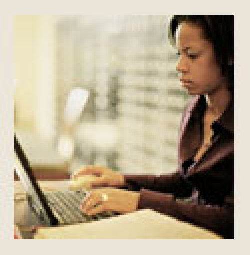
Jump to TOC

Procedure, continued

Step	Action

IF	THEN
you want to view additional records by employee	click the **Next 25** button.
you want to save your scenario	click the **Save** button.
you want to reset the amounts in your scenario to view other possibilities	click the **Reset** button.
you want to export your scenario to Excel so that you can share the scenario with others	click the **Download Job Data** button or the **Download Job and Distribution** button.

14	Click the **Summary Totals** link to view a summary of your scenario.
16	Click the **List by Position** link to view a list by position.
16	Select the **Return to Menu** link.



Section C: Day-to-Day Operations

Lesson: Using Employee Filters

Jump to TOC

Introduction

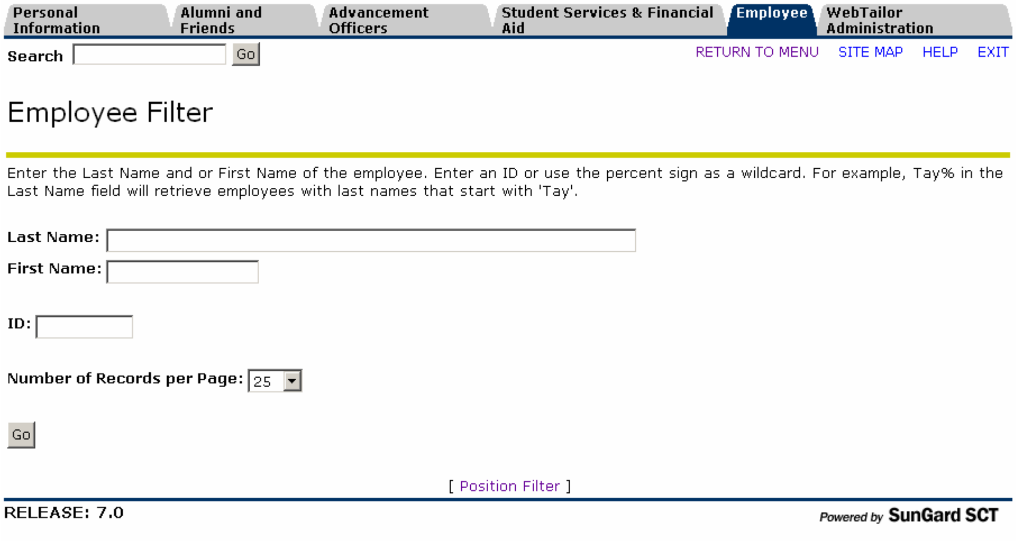
The Employee Filters page is displayed when HR Managers and/or Master Salary Planners choose to filter information **By Employee Name** on the Edit Scenario page.

This page displays a list of search criteria that can be specified to locate an employee in a specific budget scenario.

Employees can be located by conducting an exact search or a wild card search. An exact search can be made if the Employee's ID is known whereas a wild card search can be made by entering the Percent sign (%) in any field. If an exact match is found, the Employee Detail page is displayed for the corresponding employee. If more than one employee meets the search criteria a list of employees is displayed on the Search Results page.

This Web page can be accessed from the Edit Scenario page, Position Filter page, List by Position page, List by Employee page, or the Summary Totals page.

Screen image



Employee Filter

Enter the Last Name and or First Name of the employee. Enter an ID or use the percent sign as a wildcard. For example, Tay% in the Last Name field will retrieve employees with last names that start with 'Tay'.

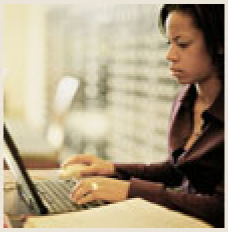
Last Name:

First Name:

ID:

Number of Records per Page: 25

RELEASE: 7.0



Section C: Day-to-Day Operations

Lesson: Using Employee Filters (Continued)

Jump to TOC

Procedure

Follow these steps to edit a record of an individual employee.

Step	Action
1	Select the **Edit Scenario** link.
2	Select a Budget Extract ID to edit in the **Extract ID** field. Notes: Displays the IDs of available Budget Extracts downloaded from Banner HR via the Budget Extract Process (NBPSPEX) in a pull-down list. Master Salary Planners can see all downloaded budget extracts.
3	Select a scenario to extract in the **Scenario** field. Note: Master Salary Planners see the *Initial* scenario listed as an entry in the pull-down list. This option will not be listed for HR Managers.
4	Select the **By Employee Name** radio button.
5	Enter the exact last name or specify a wild card search in the **Last Name** field. *Example*: ANDERSON or AN%. Search is *not* case-sensitive.
6	Enter the exact first name or specify a wild card search in the **First Name** field.
7	Specify an exact search or a wild card search using the Employee's Banner ID. *Example*: BAN12345 or BAN%.
8	Select the number of records to be displayed on each page in the **Number of Records per Page** field.

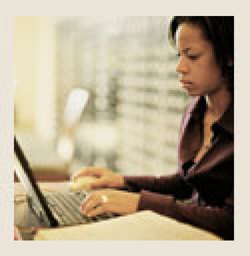
Jump to TOC

Procedure, continued

Step	Action
9	Click the **Go** button. Result: The Employee Detail page displays employees that match your criteria.

IF	THEN
one name matches your search criteria	the Employee Detail page displays your employee
more than one name matches your search criteria	then Search results page opens. Click on the name of the desired person to open the Employee Detail page. Note: The Search Results returns only those names that match the Search criteria and to which HR Managers and Master Salary Planners are given access based on the Banner Security set up for each individual user of Salary Planner.

10	Select a rounding method in the **Rounding** field.
11	Select the type of positions to be affected in the **Hourly or Salary** field.
12	Enter an amount in the **Cost of Living Adjustment Percent** or **Amount** field.
13	Enter an amount in the **Merit Increase Percent** or **Amount** field.
14	Click the **Mass Apply** button.
15	Scroll through the page to view changes by employee.
16	Click the **Jump to Bottom** link to view summary information.



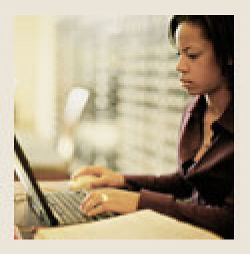
Jump to TOC

Procedure, continued

Step	Action

IF	**THEN**
you want to view additional records by employee	click the **Next 25** button.
you want to save your scenario	click the **Save** button.
you want to reset the amounts in your scenario to view other possibilities	click the **Reset** button.
you want to export your scenario to Excel so that you can share the scenario with others	click the **Download Job Data** button or the **Download Job and Distribution** button.

17	Click the **Summary Totals** link to view a summary of your scenario.
18	Click the **List by Position** link to view a list by position.
19	Select the **Return to Menu** link.



Section C: Day-to-Day Operations

Lesson: Using the List by Employee

Jump to TOC

Introduction

The List by Employee page displays the job and salary information of each employee for all positions that met the filter criteria entered on the Position or Employee Filter page.

The information displayed on this page is restricted based on the user security as established in Banner Human Resources.

It is important to note that this means that Salary Planner users may not see the salaries of *all* jobs associated with a particular employee.

The List by Employee page allows Salary Planner users to:

Apply mass changes in salary for all employees within each organization

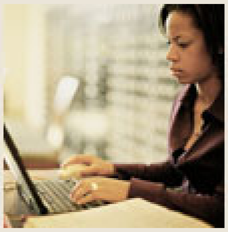
Note: Changes in salaries are limited to those jobs with salary level at *Step 0* (zero). The Job Detail page has to be accessed to mass change salaries at all other levels.
OR
Enter salary changes to specific employees in one or more organizations.

To accommodate for either situation, information on this page is organized in the following four tables:

- Mass Change Table
- List by Employee Table
- Organization Totals Table
- Filter Criteria Table

Salary changes are awarded in terms of percents or amounts for various reasons. Each Reason is listed in the Mass Change Table. Reasons for awarding a salary change can be included or excluded in the calculation of Organization Totals. The Reasons are defined in the Job Change Reason Code Rule Form (PTRJCRE).

Change Percents and Change Amounts set up to be included in the totals will be used to calculate both, the Employee Change Percent and Change Amount and the Departmental Change Percent and Change Amount.



Introduction, continued

Example: If the following percents are entered for each reason:

Reason	Percent	Amount	Include in Charge Totals
Merit Increase	3.0		Yes
Cost of Living	2.0		Yes
Other	1.0		No

Then the employee's total departmental change percent is 5%, disregarding the 1% associated with the Other reason. This value is displayed in the **Change Percent** field of the *List by Employee* table on this page.

Note**:** Changes to salary are applied to only those jobs that are updateable to each Salary Planner user based on the user's organization security and the organization's lock status.

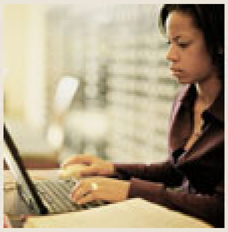
The Mass Change table is followed by an alphabetical listing of employees within each organization. Here, changes can be entered in terms of percents or amounts for a specific employee. However, the **Change Percent** and **Change Amount** fields will not be enterable unless:

- No change reason amounts or percents were previously entered, or
- The only change reason previously entered is the *default* change reason (i.e., the change reason with priority = 1 on PTRJCRE),
- The employee has just one job at Step = 0.

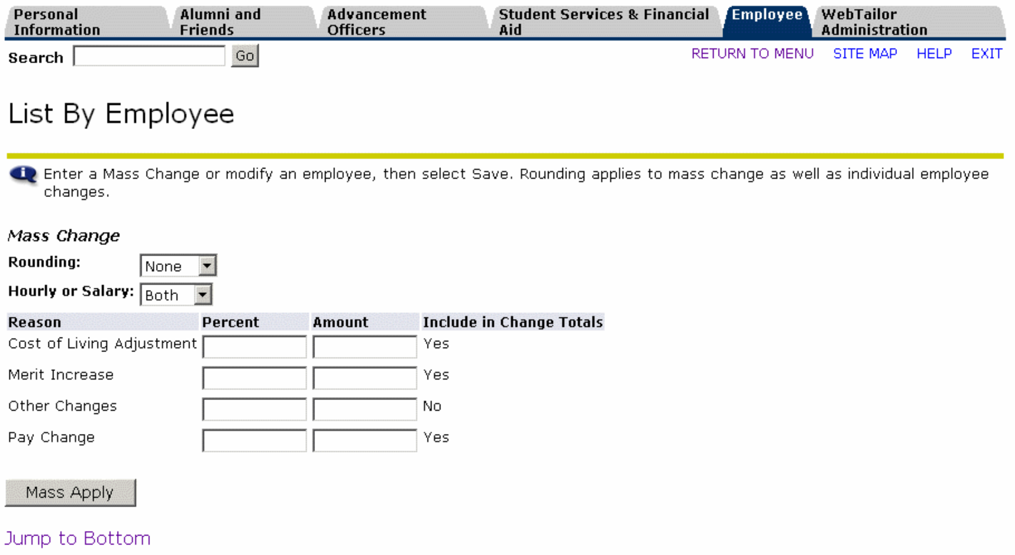
Access the Employee Detail page or the Job Detail page if a salary change is being awarded for any other reason.

The changes entered in the *List by Employee* table are totaled in the following Organization Totals table, which displays the totals at the organization level.

This is followed by a listing of the filter criteria that resulted in the selection and display of data on this page.



Screen image



List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

Mass Change

Rounding: None

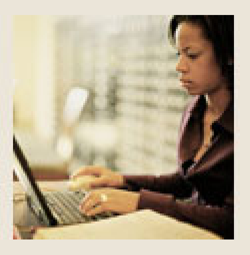
Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Cost of Living Adjustment			Yes
Merit Increase			Yes
Other Changes			No
Pay Change			Yes

Detailed field descriptions

This table contains detailed descriptions of each field.

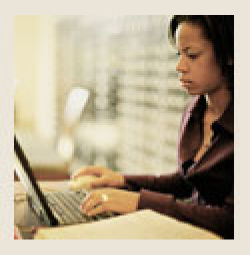
Item	Description
Rounding	Select a rounding method from the drop-down list to specify if percentage increases and individual salary amounts are to be rounded to the nearest dollar when mass applied. Options include: • *None* (Default) No rounding method is employed. • *1.00* Annual Salary is rounded to the nearest dollar or unit percent. • *10.00* Annual Salary is rounded to the nearest multiple of 10. • *100.00* Annual Salary is rounded to the nearest multiple of 100. Note: At the time of data entry, individual employee salary changes are also rounded using the rounding indicator.



Jump to TOC

Detailed field descriptions, continued

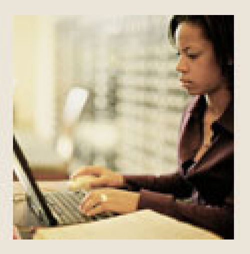
Item	Description
Hourly or Salary	Indicate the type of jobs to which the change is to be mass applied. Select any one of the following options from the pull-down list: • *Both* (Default): The change in percent or amount will be applied to the Annual Salary regardless of how the job is classified. • *Hourly*: The change in percent or amount will be applied to hourly jobs only, to the hourly rate. • *Salary*: The change in percent or amount will be applied to salaried jobs only, to the Annual Salary. Note: Mass changes can be applied for jobs only at Step 0 (zero). Otherwise the changes must be made on the Job Detail page.
Reason	Displays a list of reasons for which a change is being applied. The Job Change Reason Code Rule Form (PTRJCRE) determines the list of reasons displayed on this page. Access this rule form in Banner to update the sort order of the displayed reason codes and also to indicate if this is to be included in the **Change Percent** and **Change Amount** fields on this page.
Percent	Enter a change percent value for a reason which is to be applied to the job categories selected in the **Hourly or Salary** field.



Jump to TOC

Detailed field descriptions, continued

Item	Description
Amount	Enter a change amount value that is to be applied to the job categories selected in the **Hourly or Salary** field. The amount will be prorated based on the Proration indicator on TRINST. *Example*: FTE, Appointment Percent or None.
Include in Change Totals	This display field indicates whether the change in percents and amounts specified for a job change reason will be included in the **Changed Percent** and **Change Amount** fields of the *List by Employee* table on this page. Values are: • *Yes* • *No* Set up the value of this field for each job change reason on the Job Change Reason Code Rule Form (PTRJCRE).



Section C: Day-to-Day Operations

Lesson: Using the List by Employee (Continued)

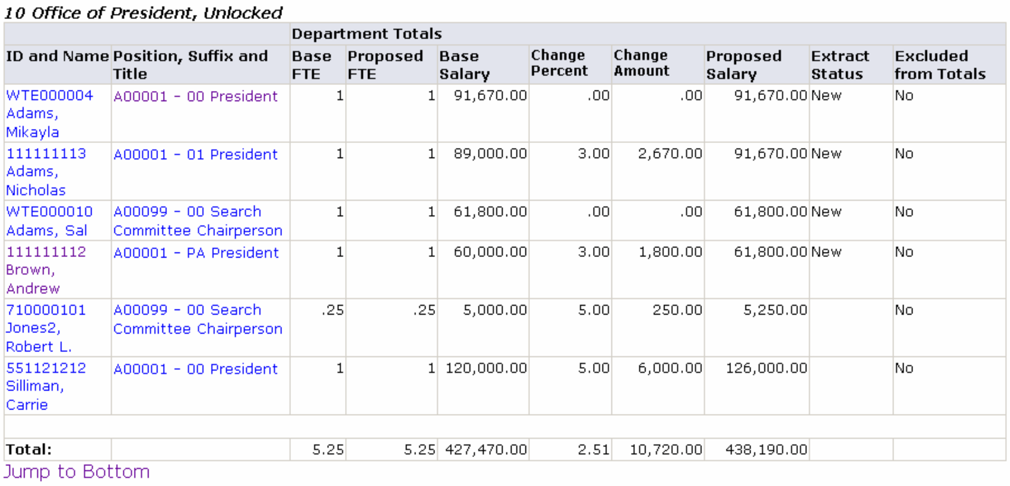
Jump to TOC

List by employee table

Located under the **Mass Apply** button on the screen, the List by Employee table displays an alphabetical list of all employees by organization based on the filter criteria entered on the Position Filters page and on the user security.

The caption of each table displays the Organization code, the Organization name and its current lock status. The Organization code and name are retrieved from the PTVORGN form if Banner Finance is *not* installed or from the FTMORGN form if Banner Finance is installed. The lock status of the organization is determined from the Organization Lock page.

Screen image



10 Office of President, Unlocked

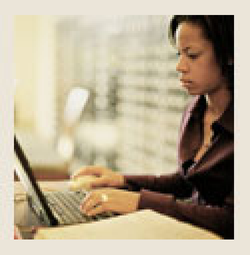
		Department Totals							
ID and Name	**Position, Suffix and Title**	**Base FTE**	**Proposed FTE**	**Base Salary**	**Change Percent**	**Change Amount**	**Proposed Salary**	**Extract Status**	**Excluded from Totals**
WTE000004 Adams, Mikayla	A00001 - 00 President	1	1	91,670.00	.00	.00	91,670.00	New	No
111111113 Adams, Nicholas	A00001 - 01 President	1	1	89,000.00	3.00	2,670.00	91,670.00	New	No
WTE000010 Adams, Sal	A00099 - 00 Search Committee Chairperson	1	1	61,800.00	.00	.00	61,800.00	New	No
111111112 Brown, Andrew	A00001 - PA President	1	1	60,000.00	3.00	1,800.00	61,800.00	New	No
710000101 Jones2, Robert L.	A00099 - 00 Search Committee Chairperson	.25	.25	5,000.00	5.00	250.00	5,250.00		No
551121212 Silliman, Carrie	A00001 - 00 President	1	1	120,000.00	5.00	6,000.00	126,000.00		No
Total:		5.25	5.25	427,470.00	2.51	10,720.00	438,190.00		

Jump to Bottom

Links

The table below contains fields you can click on to drill down.

Field	Description
ID and Name	Displays the Banner ID and name of each employee. Select this link to access the Employee Details Information page.
Position, Suffix and Title	Displays the Position, Suffix and Job title for each of an employee's jobs in the organization. Select this link to access the Job Detail page of the selected employee.



Sub-divisions of table

The *List by Employee* table is further sub-divided into:

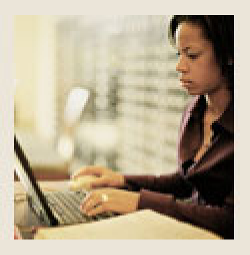
The Employee Totals Table
This table displays the Total FTE or Total Appointment Percent, and the Total Salary from all non-terminated jobs across the enterprise for each employee. This table will not be displayed unless the **View Whole Employee Detail** indicator on the Position Control Installation Rules Form (NTRINST) is selected.

The Department Totals Table
This table displays the total salary information derived for each employee for one or more positions associated with the department.

Employee Totals Table

Note**:** This table is displayed only if the **View Whole Employee Detail** field is selected in the Position Control Installation Rules Form (NTRINST).

Item	Description
ID and Name	Displays the Banner ID and name of each employee. Select this link to access the Employee Details Information page.
Position, Suffix and Title	Displays the Position, Suffix and Job title for each of an employee's jobs in the organization. Select this link to access the Job Detail page of the selected employee.



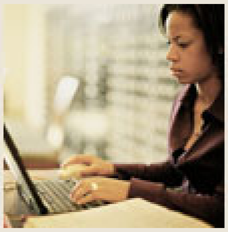
Employee Totals Table, continued

Fields	Descriptions
FTE/Appt%	The display of this field name depends on the proration method selected in the **Prorate Flat Amount By** field in the Salary Planner Rules window of the Installation Rules Form (NTRINST). If the proration method is set to Appointment Percent or None, the **Appt%** field is displayed. If the proration method is set to FTE, the **FTE** field is displayed. This field displays the employee's Total FTE or Total Appointment Percent considering all of his/her non-terminated jobs across the enterprise, based on the Effective Date that was used in the Salary Planner Extract Process (NBPSPEX).
Salary	Displays the employee's Total Annual Salary considering all of his/her non-terminated jobs across the enterprise, based on the Effective Date that was used in the Salary Planner Extract Process (NBPSPEX).

Department Totals Table

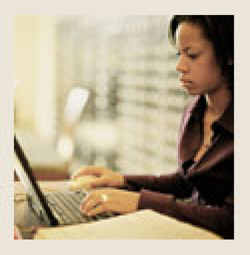
The following fields display the department budget totals for one or more positions associated with each employee as of the Job Effective Date used in the Salary Planner Extract process (NBPSPEX).

Fields	Descriptions
Base FTE/ Base Appt%	This field displays the employee's Total FTE or Appointment Percent associated with the employee's job in the organization. In other words, it represents the departmental FTE or Appointment Percent for each employee in the extracted population.
Proposed FTE/ Proposed Appt%	Displays the new proposed value of the employee's Department FTE or Appointment percent.



Department Totals Table, continued

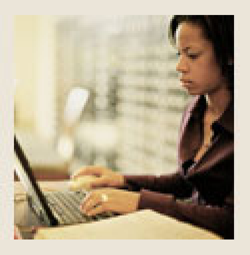
Fields	Descriptions
Base Salary	This field initially displays the employee's annual salary at the time of extract. This field can be updated on the Job Detail page.
Change Percent	This field functions as a data entry field as well as a calculated field. A Change Percent can be directly entered for an employee if: • No changes have been made to the employee previously, or • Previous changes effected only the default Job Change Reason (whose priority =1 on PTRJCRE), and • The employee has just 1 job, and • The employee's job(s) are not on a Step > 0 After the Change Percent is entered the Change Amount will be calculated. Similarly, when a Change Amount is entered or calculated in the following field, the system calculates the corresponding Change Percent by default. When this field is not enterable, the Total Change Percent is calculated as the Total Change Amount divided by the Base Salary.



Jump to TOC

Department Totals Table, continued

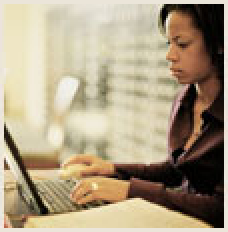
Fields	**Descriptions**
Change Amount	This field functions as a data entry field as well as a calculated field. A Change Amount can be directly entered for an employee if: • No changes have been made to the employee previously, or • Previous changes effected only the default Job Change Reason (whose priority =1 on PTRJCRE), and • The employee has just 1 job, and • The employee's job(s) are not on a Step > 0 By default, the Change Percent is also calculated. Note: Similarly, when a Change Percent is entered the system calculates the corresponding Change Amount. When this field is not enterable, the Total Change Amount is calculated as the sum of the Change Amounts marked as Included in Totals. Note: The Change Amount is always entered and displayed as a change to salary even for hourly employees.
Proposed Salary	Calculates and displays the new Proposed Salary for the employee. Note: This total is inclusive of *all* **Change Percent** and **Change Amount** values, regardless of the **Include in Change Totals** indicator.



Jump to TOC

Department Totals Table, continued

Extract Status	Displays the status of each record with regard to the extract as one of the following: • *New*: A job is marked as New when it is added to the Extract-Scenario after the *Initial* extract (using the Add/Delete process mode of the Extract (NBPSPEX)), and until a change is made to the job. • *Changed*: When the Current Salary, Appointment Percent or FTE differs from the Base Salary, Appointment Percent or FTE.
Excluded From Totals / Hide	The field name depends on the type of user accessing this Web page and the scenario being viewed. Master Salary Planners accessing the *Initial* scenario will see the **Hidden from Scenarios** field whereas HR Managers and Master Salary Planners will see the **Excluded from Totals** field when accessing all other scenarios. Jobs marked as Hidden from Scenarios will not appear in any scenario except *Initial*. Jobs marked as Excluded from Totals are excluded from all Organization Totals displayed in the Salary Planner.
Total (Row)	Displays the totals of each field listed under the *Department Totals* table, for each organization listed on this Web page. Select **Save** to view the totals on this page. Totals for an organization are only displayed after the last row (last employee) in the organization has been displayed.



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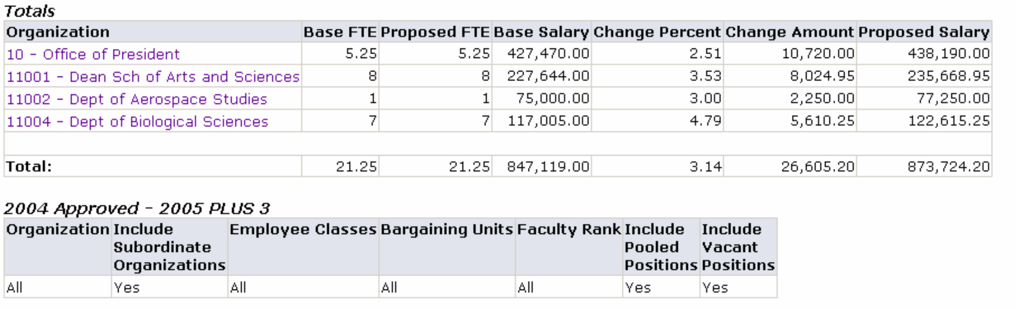
Totals table

The Totals table summarizes the Department Totals of each organization listed on this Web page, not including records that are marked as **Excluded from Totals**. Totals are not displayed unless the last record in the organization has been displayed.

<u>Note</u>: Located near the bottom of the web page, the quickest way to access the table may be to click the **Jump to Bottom** link and scroll up.

Screen image



Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
10 - Office of President	5.25	5.25	427,470.00	2.51	10,720.00	438,190.00
11001 - Dean Sch of Arts and Sciences	8	8	227,644.00	3.53	8,024.95	235,668.95
11002 - Dept of Aerospace Studies	1	1	75,000.00	3.00	2,250.00	77,250.00
11004 - Dept of Biological Sciences	7	7	117,005.00	4.79	5,610.25	122,615.25
Total:	21.25	21.25	847,119.00	3.14	26,605.20	873,724.20

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Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
All	Yes	All	All	All	Yes	Yes

Fields

The table below provides a description of the fields on this screen.

Field	Description
Organization	Displays the organization code and name, as established on the following forms: • FTMORGN: If Banner Finance is installed. • PTVORGN: If Banner Finance is *not* installed.
Base FTE	Displays the Total Base FTE calculated for each organization listed on this page. This field corresponds to the **Total FTE** field in the *Department Totals* table for each organization listed on this page.

Fields, continued

Field	Description
Proposed FTE	Displays the new Total Proposed FTE resulting from changes applied to salary records within each organization. The Total Proposed FTE is calculated as the sum of all Proposed FTE's for jobs listed in the organization, not including jobs that are excluded from totals.
Base Salary	Displays the Total Base Salary from all non-terminated jobs in each organization. Calculated field.
Change Percent	Displays the total percentage increase in salary resulting from changes made to the salaries at the employee level. It is the percentage of the ratio of the Total Increase Amount to the Total Base Salary. i.e., Total Increase Percent = (Total Increase Amount / Total Base Salary)*100
Change Amount	Displays the total increase in amounts, resulting from salary changes made at the employee level. Calculated field.
Proposed Salary	Displays the new Proposed Salary resulting from changes made to salary records within each organization. <u>Note:</u> This includes the salaries of all jobs in the organization that *were* included in the extract.

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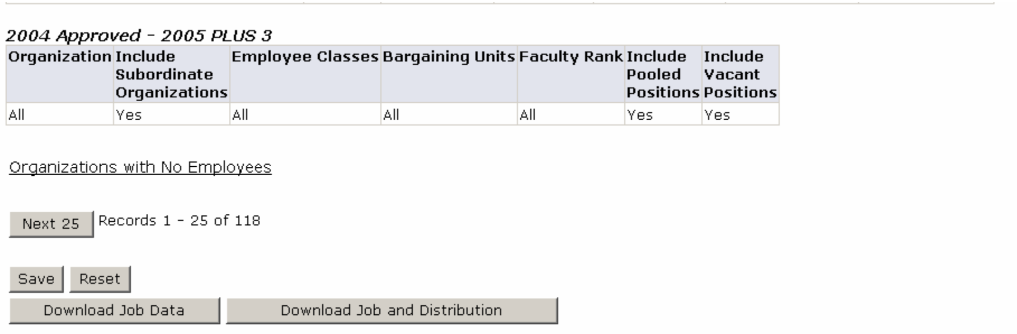
Filter criteria table

The *Filter Criteria* table displays the filter criteria entered on the Position Filters page or the Employee Filters page that resulted in the display of the above data on this page.

Screen image



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Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
All	Yes	All	All	All	Yes	Yes

Organizations with No Employees

Records 1 - 25 of 118

Buttons on this page

The following buttons are displayed at the bottom of this Web page:

Button	Action
Next N	Select this button to view the next ‘N’ records. This button is displayed only if more than ‘N’ records are available on this page. <u>Note:</u> 'N' refers to the Number of Records Per Page parameter selected on the Position Filter page.
Save	Select this button to save the changes entered on this page.
Reset	Select this button to undo any changes entered on this page.
Download Job Data	Select this button to download only job data associated with the budget scenario displayed on this page into a Comma Separated Value (.csv) file on your desktop. The .csv file can be viewed in MS Excel or MS Access.
Download Job and Distribution	Select this button to download job data and job labor distribution data associated with the budget scenario displayed on this page into a Comma Separated Value (.csv) file on your desktop. The .csv file can be viewed in MS Excel or MS Access.

Change Rules

An employee's salary can be changed for a specific job in the *List by Employee* table, or for all jobs held by the employee in the *Mass Change* table. In either case, the change is entered in the **Change Amount** field or the **Change Percent** field.

The changed salaries are calculated via mass changes or individual changes as follows:

Mass Changes

Case 1: When the Hourly or Salary Indicator = *Salary*.

Mass Changes are applied to salaried jobs only, and are applied against the *Annual Salary*.

1. When a Change Amount is entered and mass applied, the amount is prorated by the FTE or Appointment Percent, or not at all, based on the value of the **Prorate Flat Amount By** indicator set up on NTRINST.

   A job with zero (0) FTE or Appointment Percent will get a $0 increase.

2. When a Change Percent is mass applied, the percent is multiplied by the job's salary regardless of the FTE or Appointment Percent.

Case 2: When the Hourly or Salary Indicator = *Hourly*

In this case, mass changes are applied to hourly jobs only, and are applied against the *Rate*.

1. When a **Change Amount** is entered and mass applied, the amount is prorated by FTE or Appointment Percent, or not at all, based on the **Prorate Flat Amount By** indicator defined on NTRINST.

   A job with zero (0) FTE or Appointment Percent will get a $0 increase.

2. When a **Change Percent** is mass applied, the percent is multiplied by the Rate regardless of the FTE.

Change Rules, continued

Case 3: Hourly or Salary Indicator = *Both*

Mass changes are applied towards the Annual Salary for hourly as well as salaried jobs.

1. When a Change Amount is entered and mass applied, the amount will be prorated by FTE or Appointment Percent, or not at all, based on the **Prorate Flat Amount By** indicator on NTRINST. A job with zero (0) FTE or Appointment Percent will get a $0 increase.

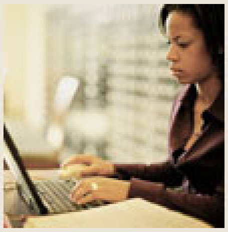
For an hourly job the Proposed Annual Salary is calculated using the following formulae:
Hourly Change Amount = Prorated Amount/Factor/Hours per pay --> (*A*)

Using (A),

New Proposed Annual Salary = Hourly Change Amount + Base Rate x
Factor x
Hours per Pay

If a rounding factor other than None is selected, then the Proposed Hourly Rate is recalculated as:

Proposed Hourly Rate = Proposed Annual Salary/Factor /Hrs per Pay



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Change Rules, continued

2. When a Change Percent is mass applied the Change Percent is multiplied by the job salary, regardless of the FTE or Appointment Percent.

For an Hourly Job the calculations are:

Hourly Change Amount = Change% x Salary/Factor/Hrs per Pay -> (*B*)

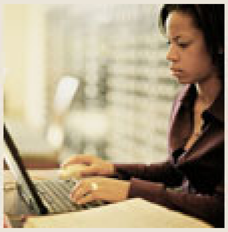
Using (B),

New Proposed Rate = Sum of Hourly Change Amounts + Base Rate---> (*C*)

Using (C),

New Proposed Salary. = New Proposed Rate x Factor x Hours per Pay

Note: Mass changes are applied to all jobs that meet the filter criteria, except jobs where Step > 0 (zero). Some employees may appear to be non-updateable because they have an hourly and a salaried job, or have changes for more than one job change reason. However these employees/jobs can be updated by the Mass Change process.



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Individual Changes

1. When a *change amount* is entered the full amount is prorated over all jobs (that meet the filter criteria) as follows:

(Base Job FTE 1/Total Base FTE1 all jobs) x Flat Amount

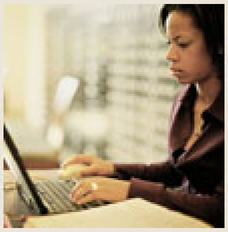
Example: Consider employee Jake LaMotta having 3 jobs with the following Base Salaries and Base FTEs listed below:

	Base FTE[1]	***Base Salary***
Job #1	0.50	30,000.00
Job #2	0.25	30,000.00
Job #3	0	5000.00

[1] *The only way to change the Proposed Hourly Rate or Annual Salary is to enter a Change Percent or Change Amount for a Change Reason. On the Job Detail page all changes associated with a Job Change Reason are applied to the Hourly Rate if the job is defined as Hourly, and to the Annual Salary if the job is salaried*

On entering a Change Amount of $1000.00 in the *List by Employee* table, the prorated amount is calculated for each job as follows:

	Prorated Amount	
Job #1	(0.50/0.75) x 1000	= $666.67
Job #2	(0.25/0.75) x 1000	= $ 333.33
Job #3	0	= $0

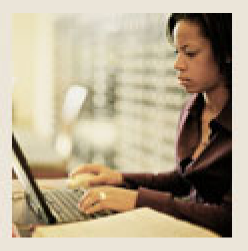


Page Setup Requirements

To view this Web page correctly, ensure that the following forms are set up in Banner:

Item	Description
PTRJCRE	Set up the **Display /Priority on Web** field for each job change reason. Set up the **Include in Web Totals** checkbox field for each job change reason.

NTRINST	In the Salary Planner Rules window:
	• Select the **View Whole Employee Detail** indicator field to be able to access the Employee Totals table on the List by Employee page.
	• In the **Prorate Flat Amount By** field, select a method for prorating the salary increase amount. Options include:
	  • Appointment percent (Default)
	  • FTE and None
	
	Note: The selected method will be displayed in the *Employee Totals* table on the List by Employee page.



Section C: Day-to-Day Operations

Lesson: Using the Employee Detail Page

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Introduction

The Employee Detail page is accessed by selecting an employee on the List by Employee page or on the Employee Filter page. Based on the user's Organization, Employee Class, Employer, and Salary level security, and the setting of the **View Whole Employee Detail** indicator on the Position Control Installation Rules Form (NTRINST) in Banner, this page displays all jobs associated with a specific employee.

Salary Planner users can use this page to:

- Access and review all positions held by an employees in one or more organization,
- Mass update an employee's salary for *updateable* positions listed by specifying a change in percent or amount,

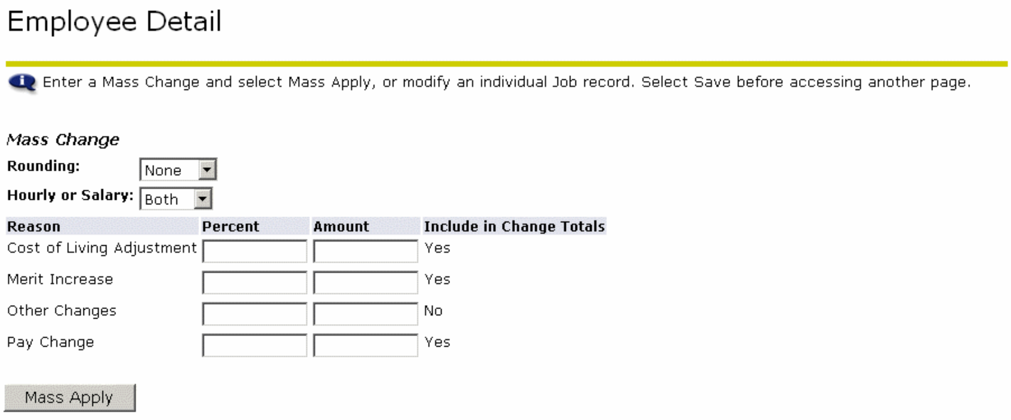
OR

- Update the employee's salary for a specific position.

The information on this page is organized into four tables:

- Mass Change Table
- Extracted Jobs Table
- Other Jobs Table
- Extract Totals Table

Screen image



Employee Detail

Enter a Mass Change and select Mass Apply, or modify an individual Job record. Select Save before accessing another page.

Mass Change

Rounding: None

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Cost of Living Adjustment			Yes
Merit Increase			Yes
Other Changes			No
Pay Change			Yes

Web Page Fields

The following fields are displayed on this page:

Mass Change Table

The Mass Change table lists all reasons for which a salary change can be entered. Reasons for awarding a salary change are defined as included or excluded in the calculation of job and organization change totals. This distinction is made on the Job Change Reason Code Rule Form (PTRJCRE).

Example: If the following percents are entered for each reason,

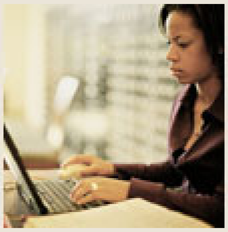
Reason	Percent	Amount	Include in Change Totals
Merit increase	3.0		Yes
Cost of living	2.0		Yes
Other	1.0		No

Then the employee’s Total Change Percent for each job is 5%, disregarding the 1% associated with the Other reason, and the Total Change Amount will also reflect the 5% change.

Note: Changes to salary are only applied to those jobs to which the user has update access.

Fields

Fields	Descriptions
Rounding	Select a rounding method from the drop-down list to specify if mass and individual salary changes are to be rounded. Options include: • *None* (Default): No rounding method is employed. • *1.0*: Annual salary is rounded to the nearest dollar or unit percent. • *10.00*: Annual salary is rounded to the nearest multiple of 10. • *100.00*: Annual salary is rounded to the nearest multiple of 100.



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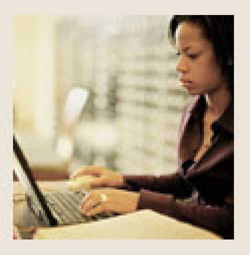
Fields, continued

Fields	Descriptions
Hourly or Salary	Indicate the type of jobs and value to which the change is to be mass applied. Select any one of the following options from the drop-down list: • *Both* (Default): The change in percent or amount will be mass applied to the Annual Salary regardless of how the job is classified (salary or hourly). • *Hourly*: The change in percent or amount will be mass applied to hourly jobs only, and will be applied to the hourly rate. • *Salary*. The change in percent or amount will be mass applied to salaried jobs only and will be applied to the Annual Salary. Note: Mass changes are applied to jobs at Step 0 (zero) only. Changes to jobs on a Step greater than 0 (zero) must be made on the Job Detail page.
Reason	Displays a list of reasons for which a change is being mass applied. The Job Change Reason Code Rule Form (PTRJCRE) determines the list of reasons displayed on this page. Access this rule form to update the sort order of the displayed reason codes and also to indicate if this is to be included in the **Total Change Percent or Change Amount** fields on the List by Employee page.



Reasons

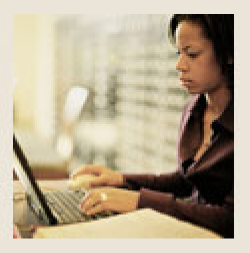
Each reason is associated with the following three fields:

Field	Description
Percent	Enter a percent value of change for a reason which is to be applied to the job categories selected in the **Hourly or Salary** field. Percents associated with reasons not to be considered in the calculation of the budget will *not* be included. This field cannot be entered if the amount has been entered.
Amount	Enter an amount for a reason that is to be applied to the job categories selected in the **Hourly or Salary** field. The amount entered will be prorated based on the set up of the **Prorate Flat Amount By** indicator in the Position Control Installation Rules Form (NTRINST) in Banner. This field cannot be entered if a percent has been entered in the previous field.
Include in change totals	This display field indicates whether the change in percent or amount specified for a job change reason will be included in the **Total Change Percent** and the **Total Change Amount** fields on the List by Employee page. Values are: *Yes* or *No* Set up the value of this field for each job change reason on the Job Change Reason Code Rule Form (PTRJCRE).

Extracted Jobs Table

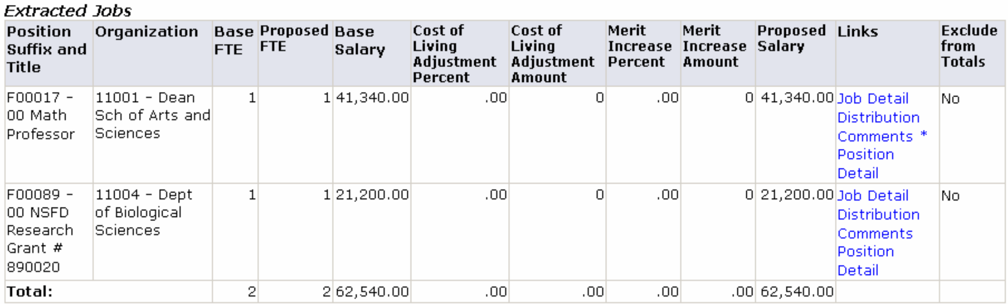
This table lists all of an employee’s job that were included in the extract and the filter criteria to which the user has access. If the **View Whole Employee Detail** indicator on NTRINST is checked, all of an employee's jobs, even those in organizations to which the user does not have access, will be displayed.

Only positions in organizations to which the user has update access and which are unlocked based on the user organization security can be updated.



Jump to TOC

Screen image



Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Salary	Cost of Living Adjustment Percent	Cost of Living Adjustment Amount	Merit Increase Percent	Merit Increase Amount	Proposed Salary	Links	Exclude from Totals
F00017 - 00 Math Professor	11001 - Dean Sch of Arts and Sciences	1	1	41,340.00	.00	0	.00	0	41,340.00	Job Detail Distribution Comments * Position Detail	No
F00089 - 00 NSFD Research Grant # 890020	11004 - Dept of Biological Sciences	1	1	21,200.00	.00	0	.00	0	21,200.00	Job Detail Distribution Comments Position Detail	No
Total:		2	2	62,540.00	.00	.00	.00	.00	62,540.00		

Fields

Each position is listed with the following information:

Field	Description
Position, Suffix and Title	Displays the Position number, its associated Suffix and the Position Title. This information is extracted from the corresponding fields on the Employee Jobs Form (NBAJOBS).
Organization	Displays the organization code and description of the budget organization associated with the relevant job(s). This information is extracted from the **Orgn** field in the Position Salary Budgets window of the Position Budget Form (NBAPBUD).

The following two fields are displayed if the **Prorate Flat Amount By** indicator in the Salary Planner Rules window of NTRINST is set to FTE.

Field	Description
Base FTE	Displays the Base FTE value associated with the job at the time of the extract.
Proposed FTE	Displays the new, Proposed Job FTE value. This field can be updated when Step = 0 (zero).

Fields, continued

The following two fields are displayed if the **Prorate Flat Amount By** indicator in the Salary Planner Rules window of NTRINST is set to Appointment Percent or None.

Field	Description
Base Appt%	Displays the Base Appointment Percent associated with the job at the time of the extract.
Proposed Appt%	Displays the new, Proposed Appointment Percent associated with the job. This field can be updated when the Step = 0 (zero).

The following two fields are displayed if the employee has *hourly* jobs:

Field	Description
Base Rate	Displays the hourly rate of the employee’s current salary. This information is initially extracted from the **Rate** field in the Job Detail window of NBAJOBS.
Proposed Rate	Displays the proposed hourly rate for the relevant job. Calculated field.

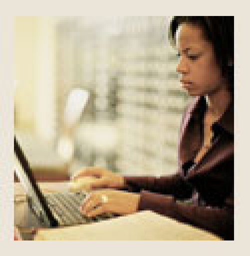
The following fields are displayed for *all* jobs:

Field	Description
Base Salary	This information is initially extracted from the **Annual Salary** field on the Job Detail window of NBAJOBS based on the Job Effective Date used in the Extract process. The Base Salary can be subsequently changed on the Job Detail page.

Fields, continued

The display of the following four fields depend on the Priority established for the job change reason codes on the Job Change Reason Code Rules Form (PTRJCRE) in Banner. The field titles correspond to the description of job change reasons that have been assigned for the top two priorities on PTRJCRE.

Field	Description
<*Job Change Reason Description 1*> Percent	The field title displays the description of the Job Change Reason code having the *first* priority in PTRJCRE (i.e., Priority = 1). Enter the percentage value by which the salary is to be altered.
<*Job Change Reason Description 1*> Amount	The field title displays the description of the Job Change Reason code having the *first* priority in PTRJCRE. Enter an amount by which the salary is to be altered.
<*Job Change Reason Description 2*> Percent	The field title displays the description of the Job Change Reason code given the *second* priority in PTRJCRE, (i.e., Priority = 2). Refer to the field, **<*Job Change Reason Description 1*> Percent** for more details.
<*Job Change Reason Description 2*> Amount	The field title displays the description of the Job Change Reason code given the *second* priority in PTRJCRE. Refer to the field, **<*Job Change Reason Description 1*> Amount** for more details.
Proposed Salary	Calculates and displays the proposed change to the employee's Base Salary. This total is inclusive of *all* changes specified in terms of percents or amounts, regardless of their associated **Include in Change Totals** indicator value specified in the *Mass Change* table or in the Job Detail page. The proposed salary includes all job change reasons and not just those displayed on this page, i.e., first and second priority.



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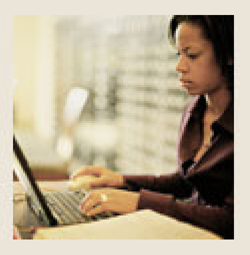
Fields, continued

Field	Description
Links	This field lists all Web pages that are associated with the employee's positions. Select the appropriate link to access the relevant Web page. These include: • Job Detail Goes to the Job Detail page • Distribution Goes to the Job Labor • Distribution page • Comments Goes to the Comments page • Position Detail Goes to the Position Detail page Note: These links are only available for jobs that were a part of the filter criteria entered on the Position Filter page. When this page is accessed from the Employee Filter page links will be available for all jobs to which the user has either update or query access.
Exclude from Totals	Click this checkbox to exclude salaries in the calculation of the Organization Totals.
Total (row)	Displays the totals for the corresponding components in this table, considering only those positions for which the **Exclude from Totals** field has not been selected. This row computes and displays the: • Total Base FTE • Total Proposed FTE • Total Base Rate • Total Proposed Rate • Total Base Salary • Total Amounts and Total Percents of the job change reasons with the top two priorities. • Total Proposed Salary



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Other Jobs Table

The information displayed in the *Other Jobs Table* depends on the **View Whole Employee Detail** indicator on NTRINST. If this indicator is *selected*, the application disregards the user's organization security set up and/or any filter criteria previously specified, and displays all other positions associated with the employee in addition to the positions accessible to the Salary Planner user by default. These include:

All other positions of the employee which were not included in the Extract ID, including positions in organizations to which the user does not have access and
All other positions of the employee which were marked to be hidden from this budget scenario.

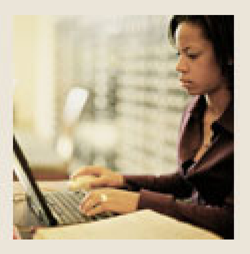
If the **View Whole Employee Detail** indicator is *not* selected on NTRINST, only jobs accessible to the user that were not included in the Extract ID and jobs that are marked Hidden in the *Initial* Scenario are displayed.

Information in the *Other Jobs* table is display-only.

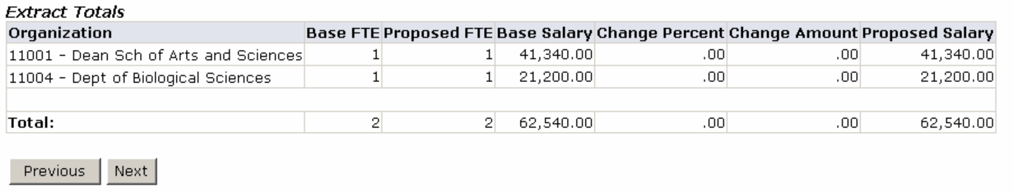
Fields	Description
Position - Suffix	Displays the Position number, its associated suffix and a description of the position.
Department	Displays the Time Sheet Organization code and description associated with the Job.
FTE	Displays the FTE associated with the Job.
Appointment Percent	Displays the appointment percent associated with the Job.
Hourly Rate	Displays the hourly rate associated with the Job.
Annual Salary	Displays the annual salary associated with the Job.

Extract Totals Table

The Extract Totals table displays the organization totals of the following components, considering only the jobs displayed in the *Extract Jobs* table.



Screen image



Extract Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
11001 - Dean Sch of Arts and Sciences	1	1	41,340.00	.00	.00	41,340.00
11004 - Dept of Biological Sciences	1	1	21,200.00	.00	.00	21,200.00
Total:	2	2	62,540.00	.00	.00	62,540.00

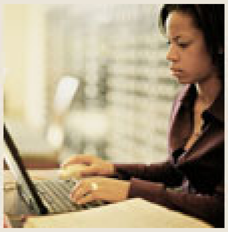
Note: This does not include the totals associated with positions marked as Excluded or those marked as Hidden in the *Initial* Scenario.

Fields

Field	Description
Organization	Displays the organization code and description associated with the position(s).

The following fields are displayed if the **Prorate Flat Amount By** indicator in NTRINST is set to FTE.

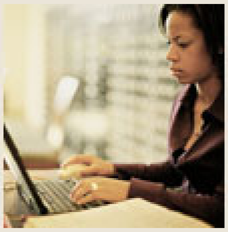
Field	Description
Base FTE	Displays the Total Base FTE associated with the jobs included in the extract, assigned to the employee in the organization. Note: This total excludes jobs that are hidden and jobs that have the **Exclude from Totals** field selected in the *Extracted Jobs* table. The Total Base FTE resulting from all extracted jobs across all organizations is displayed in the last row.



Jump to TOC

Fields, continued

Field	Description
Proposed FTE	Displays the Total Proposed FTE associated with the e jobs included in the extract, assigned to the employee in the organization. Note**:** This total excludes jobs that are hidden and jobs that have the **Exclude from Totals** field selected in the *Extracted Jobs* table. The Total Proposed FTE resulting from all extracted jobs across all organizations is displayed in the last *row*.
Base Salary	Displays the Total Base Salary for the employee for each organization. This total excludes all positions that have been hidden from the extract and those that have the **Exclude from Totals** field selected in the *Extracted Jobs* table. The resulting Total Base Salary for the employee is computed in the last row.
Change Percent	Displays the percentage of change in the employee’s salary for each organization. The total percentage of change is calculated in the last row. It is computed as follows: Change Percent = Total Change Amount / Total Base Salary
Change Amount	Displays the total amount by which the employee’s salary has changed for each organization. The Total Amount of Change for the employee is calculated in the last row.



Jump to TOC

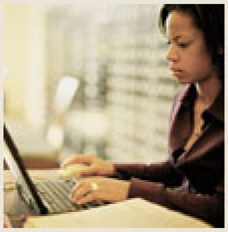
Fields, continued

Field	Description
Proposed Salary	Displays the employee’s Proposed Salary for each organization. The Total Proposed Salary for the employee is calculated in the last row.

Buttons on this Page

The following buttons are displayed on this page.

Button	Action
Mass Apply	Select this button to mass apply changes specified in the Mass Change table to jobs displayed on this page to which the user has update access.
Previous	Select this button to access the previous employee detail record.
Next	Select this button to access the next employee detail record.



Section C: Day-to-Day Operations

Lesson: Change Rules in the Employee Detail Page

Jump to TOC

Introduction

An employee’s salary can be changed for a specific job in the *Extracted Jobs* table, or for all user-accessible, updateable jobs held by the employee in the *Mass Change* table. In either case, the change is entered in the **Change Amount** field or the **Change Percent** field.

The changed salaries are calculated for mass changes and individual changes as follows:

Mass Changes

1. When a *Change Amount* is entered, the full amount is prorated over all jobs to which a Salary Planner user has update access based on the **Prorate Flat Amount By** indicator in NTRINST, regardless of the initial filter criteria using the following formula:

Change Amount = Base FTE x Flat Amount

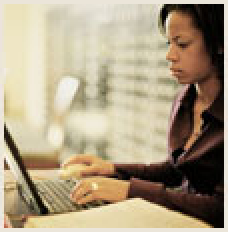
Total Base FTE for all jobs to which the Salary Planner user has update access

Example: consider the employee, Jake LaMotta, having 3 jobs with the following Base Salaries and Base FTEs listed below:

	Base FTE	*Base Salary*
Job #1	0.50	30,000.00
Job # 2	0.25	30,000.00
Job # 3	0	5,000.00

On entering a Change Amount of $1000.00 in the *Mass Change* table, the prorated amount is calculated for each job as follows:

	Prorated Amount	
Job #1	(0.50/0.75) x 1000	= $666.67
Job #2	(0.25/0.75) x 1000	= $ 333.33
Job #3	0	= $0



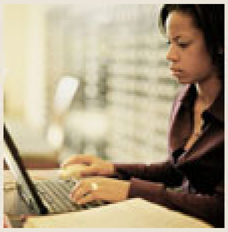
Jump to TOC

Introduction, continued

2. When a *Change Percent* is entered, the Base Annual Salary of each job to which the user has update access is multiplied by the Change Percent, *regardless* of the Proration indicator on NTRINST.

Example: If a Change Percent of 3% is entered in the *Mass Change* table, the increment to the Base Annual Salary of each job is calculated as follows:

Job #1	30,000 x .03	= $900.00
Job #2	30,000 x .03	= $900.00
Job #3	5000 x .03	= $150.00



Section C: Day-to-Day Operations

Lesson: Changing the Status of an Organization Lock

Jump to TOC

Introduction

The Organization Lock Selection page allows Salary Planner users to check the lock status of an organization within each Extract ID/Scenario combination or find organizations having a particular lock status.

Access this page by selecting the Maintain Organization Lock menu option from the **Salary Planner** menu.

When an organization is locked, users with update access to the organization are restricted to query-only access unless the user also has update access to the predecessor organization, and the predecessor is unlocked. When an organization is in an unlocked status, it is open to update. Organization lock functionality depends on the type of access given to Salary Planner users, namely:

- Query access
- Update access

Users with query access can only query the lock status of an organization.
Users with update access to a predecessor organization can change the lock status of the successor organizations.

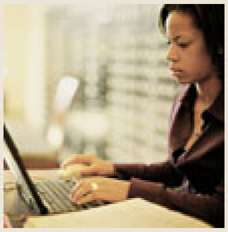
Predecessor organizations are defined in FTMORGN when *Banner Finance* is installed, otherwise in PTVORGN when *Banner Finance* is *not* installed.

Note: When an Initial Scenario is created using the Salary Planner Extract Process (NBPSPEX), all organizations in the scenario have an unlocked status.

Similarly, when a new scenario is created from an Initial Scenario using the Create Scenario page, all organizations within the new scenario have an unlocked status.

Technical Note: An organization that does not have a Lock Record in the Lock table inherits the Lock status of its predecessor organization. If its predecessor does not exist, the organization inherits the status of the next predecessor in the hierarchy; and so on until a record is found. If no record is found the organization is considered unlocked.

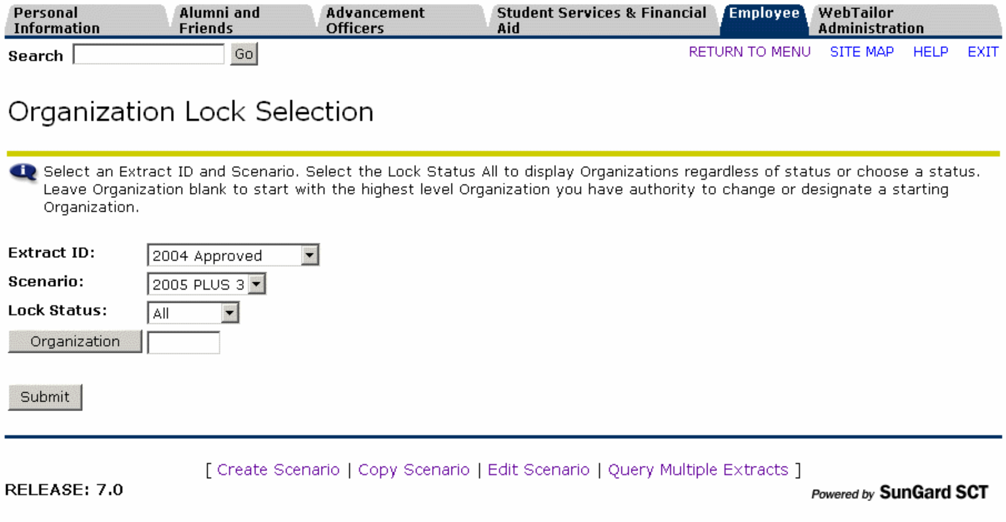
To check the lock status of an organization, select an Extract ID, Scenario combination, and an organization. Select the **Submit** button to obtain a response for your query.



Lesson: Changing the Status of an Organization Lock (Continued)

Jump to TOC

Screen image



Organization Lock Selection

Select an Extract ID and Scenario. Select the Lock Status All to display Organizations regardless of status or choose a status. Leave Organization blank to start with the highest level Organization you have authority to change or designate a starting Organization.

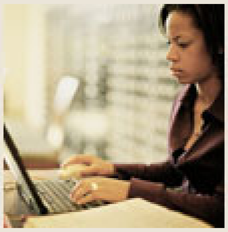
Extract ID: 2004 Approved
Scenario: 2005 PLUS 3
Lock Status: All

RELEASE: 7.0

Procedure

Follow these steps to view the lock status of an organization.

Step	Action
1	Select the **Organization Lock** link from the Salary Planner Menu page.
2	Select a description of an Extract ID from the drop-down list in the **Extract ID** field.
3	Select a description of a Scenario from the drop-down list in the **Scenario** field.
4	Select a lock status that is to be queried from the pull down list. Specify an option in this field to determine organizations having a particular lock status. Options include: • All • Locked • Unlocked
5	Enter an organization code in the **Organization** field. Note: You can look up an organization code using the **Organization** button. Leave this field blank to select the highest level organization you have access to.

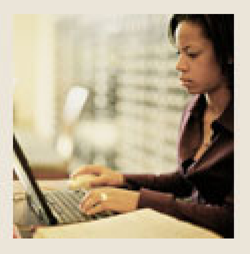


Lesson: Changing the Status of an Organization Lock (Continued)

Jump to TOC

Procedure, continued

Step	Action
6	Click the **Submit** button. <u>Result</u>: The Change Organization Lock page opens. The Change Organization Lock page allows users to change the current lock status of an organization for a selected Extract ID, Scenario combination.
7	Click the **Change** checkbox next to the organization that you want to change.
8	Select the **Update** button to change the organization lock status.
9	Click the **Return to Menu** link.



Section C: Day-to-Day Operations

Lesson: Creating a Multiple Query Extract - Employee

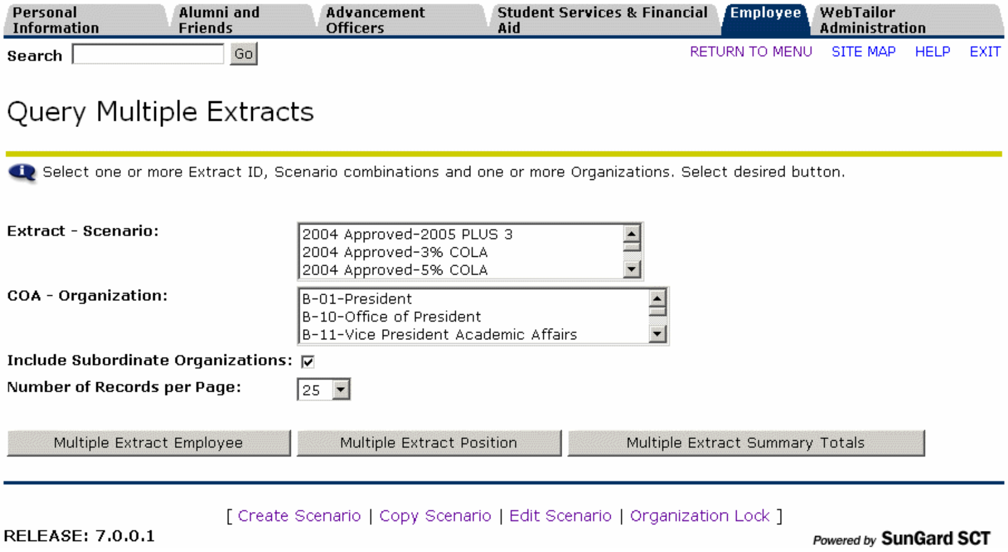
Jump to TOC

Introduction

The Multiple Extracts - Employee page can be accessed from the Query Multiple Extracts page or the Multiple Extract pages for Position or Summary Totals. Information is display-only.

Here, each organization is displayed as a separate table, within each Extract ID/Scenario. Each Organization is then summarized in a Totals table including amounts from each Extract ID selected.

Screen image



Query Multiple Extracts

Select one or more Extract ID, Scenario combinations and one or more Organizations. Select desired button.

Extract - Scenario: 2004 Approved-2005 PLUS 3
2004 Approved-3% COLA
2004 Approved-5% COLA

COA - Organization: B-01-President
B-10-Office of President
B-11-Vice President Academic Affairs

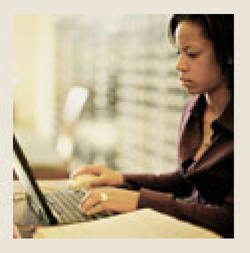
Include Subordinate Organizations: ☑

Number of Records per Page: 25

Procedure

Follow these steps to query multiple extracts.

Step	Action
1	Select the **Query Multiple Query** link from the Salary Planner menu page.
2	Select a scenario in the **Extract – Scenario** field. <u>Note</u>: To select more than one scenario, hold the <Shift> key and click on a second scenario.
3	Select an organization in the **COA – Organization** field.
4	Click the **Include Subordinate Organization** checkbox if you want to view the subordinate organizations.



Section C: Day-to-Day Operations

Lesson: Creating a Multiple Query Extract - Employee (Continued)

Jump to TOC

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Multiple Extract Employee button.

<u>Result</u>: The Multiple Extracts – Employee window opens with the results of your query displayed.

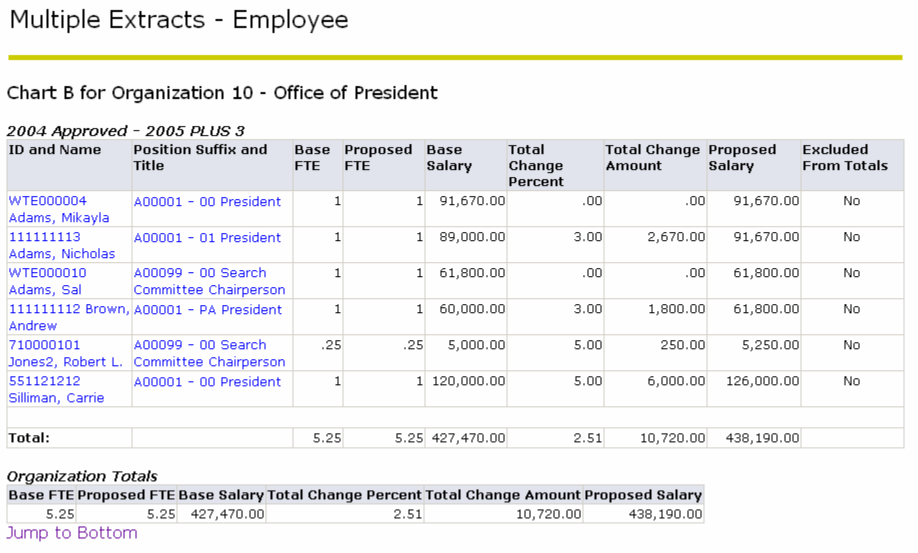
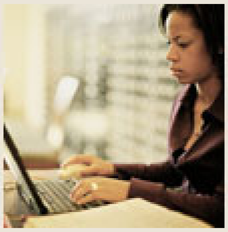

Multiple Extracts - Employee

Chart B for Organization 10 - Office of President

<i>2004 Approved - 2005 PLUS 3</i>
<table>
<tr><th>ID and Name</th><th>Position Suffix and Title</th><th>Base FTE</th><th>Proposed FTE</th><th>Base Salary</th><th>Total Change Percent</th><th>Total Change Amount</th><th>Proposed Salary</th><th>Excluded From Totals</th></tr>
<tr><td>WTE000004 Adams, Mikayla</td><td>A00001 - 00 President</td><td>1</td><td>1</td><td>91,670.00</td><td>.00</td><td>.00</td><td>91,670.00</td><td>No</td></tr>
<tr><td>111111113 Adams, Nicholas</td><td>A00001 - 01 President</td><td>1</td><td>1</td><td>89,000.00</td><td>3.00</td><td>2,670.00</td><td>91,670.00</td><td>No</td></tr>
<tr><td>WTE000010 Adams, Sal</td><td>A00099 - 00 Search Committee Chairperson</td><td>1</td><td>1</td><td>61,800.00</td><td>.00</td><td>.00</td><td>61,800.00</td><td>No</td></tr>
<tr><td>111111112 Brown, Andrew</td><td>A00001 - PA President</td><td>1</td><td>1</td><td>60,000.00</td><td>3.00</td><td>1,800.00</td><td>61,800.00</td><td>No</td></tr>
<tr><td>710000101 Jones2, Robert L.</td><td>A00099 - 00 Search Committee Chairperson</td><td>.25</td><td>.25</td><td>5,000.00</td><td>5.00</td><td>250.00</td><td>5,250.00</td><td>No</td></tr>
<tr><td>551121212 Silliman, Carrie</td><td>A00001 - 00 President</td><td>1</td><td>1</td><td>120,000.00</td><td>5.00</td><td>6,000.00</td><td>126,000.00</td><td>No</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Total:</td><td></td><td>5.25</td><td>5.25</td><td>427,470.00</td><td>2.51</td><td>10,720.00</td><td>438,190.00</td><td></td></tr>
</table>
<i>Organization Totals</i>
<table>
<tr><th>Base FTE</th><th>Proposed FTE</th><th>Base Salary</th><th>Total Change Percent</th><th>Total Change Amount</th><th>Proposed Salary</th></tr>
<tr><td>5.25</td><td>5.25</td><td>427,470.00</td><td>2.51</td><td>10,720.00</td><td>438,190.00</td></tr>
</table>

<u>Note</u>: You can click on any blue web link to view additional information about the selected item.</td></tr>
<tr><td>6</td><td>Scroll through the report or click the Jump to Bottom link.</td></tr>
<tr><td>7</td><td>Click the Query Multiple Extracts link.</td></tr>
</table>



Section C: Day-to-Day Operations

Lesson: Creating a Multiple Extract - Position

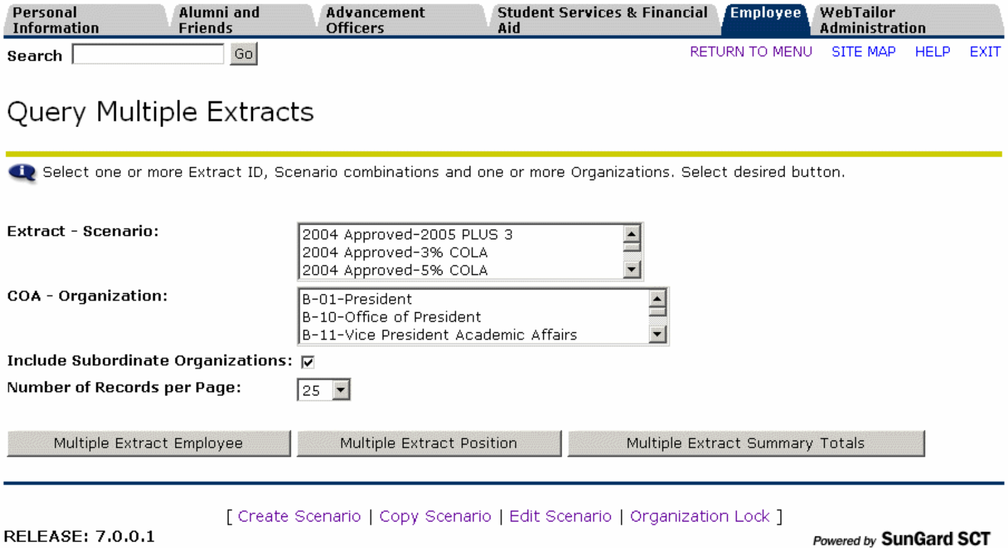
Jump to TOC

Introduction

The Multiple Extracts - Positions page can be accessed from the Query Multiple Extracts page or the Multiple Extract pages for Employee or Summary Totals. All information is display-only.

Screen image

Here, each organization is displayed as a separate table, within each Extract ID/Scenario combination. Each organization is then summarized in a Totals table including amounts from each Extract ID selected.



Query Multiple Extracts

Select one or more Extract ID, Scenario combinations and one or more Organizations. Select desired button.

Extract - Scenario: 2004 Approved-2005 PLUS 3
2004 Approved-3% COLA
2004 Approved-5% COLA

COA - Organization: B-01-President
B-10-Office of President
B-11-Vice President Academic Affairs

Include Subordinate Organizations: ☑

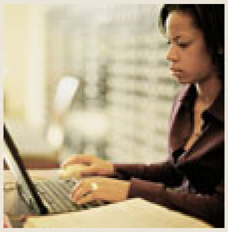
Number of Records per Page: 25

RELEASE: 7.0.0.1

Procedure

Follow these steps to query multiple extracts.

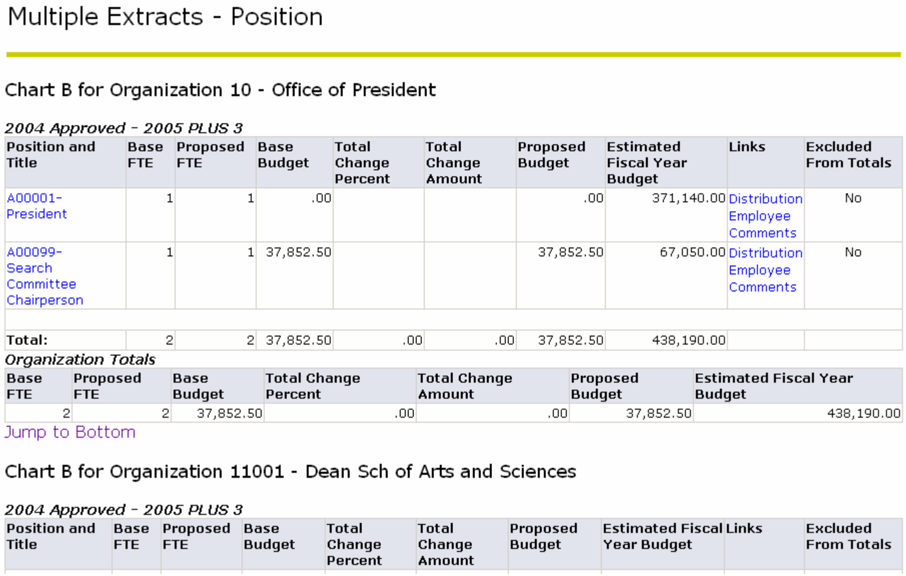
Step	Action
1	Select the **Query Multiple Query** link from the Salary Planner menu page.
2	Select a scenario in the **Extract – Scenario** field. Note: To select more than one scenario, hold the <Shift> key and click on a second scenario.
3	Select an organization in the **COA – Organization** field.
4	Click the **Include Subordinate Organization** checkbox if you want to view the subordinate organizations.



Jump to TOC

Procedure, continued

Step	Action
5	Click the **Multiple Extract Position** button. Result: The Multiple Extracts – Position window opens with the results of your query displayed.



Multiple Extracts - Position

Chart B for Organization 10 - Office of President

2004 Approved - 2005 PLUS 3

Position and Title	Base FTE	Proposed FTE	Base Budget	Total Change Percent	Total Change Amount	Proposed Budget	Estimated Fiscal Year Budget	Links	Excluded From Totals
A00001-President	1	1	.00			.00	371,140.00	Distribution Employee Comments	No
A00099-Search Committee Chairperson	1	1	37,852.50			37,852.50	67,050.00	Distribution Employee Comments	No
Total:	2	2	37,852.50	.00	.00	37,852.50	438,190.00		

Organization Totals

Base FTE	Proposed FTE	Base Budget	Total Change Percent	Total Change Amount	Proposed Budget	Estimated Fiscal Year Budget
2	2	37,852.50	.00	.00	37,852.50	438,190.00

Jump to Bottom

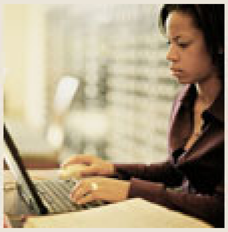
Chart B for Organization 11001 - Dean Sch of Arts and Sciences

2004 Approved - 2005 PLUS 3

Position and Title	Base FTE	Proposed FTE	Base Budget	Total Change Percent	Total Change Amount	Proposed Budget	Estimated Fiscal Year Budget	Links	Excluded From Totals

Note: You can click on any blue web link to view additional information about the selected item.

Step	Action
6	Scroll through the report or click the **Jump to Bottom** link.
7	Click the **Query Multiple Extracts** link.



Section C: Day-to-Day Operations

Lesson: Creating a Multiple Extract - Summary Totals

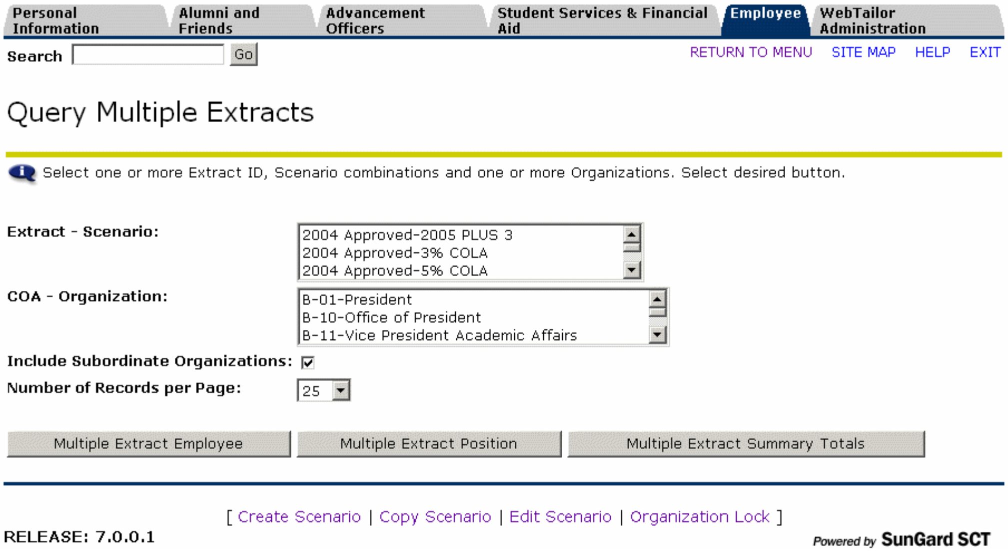
Jump to TOC

Introduction

The Multiple Extracts Summary Totals page can be accessed from the Query Multiple Extracts page or the Multiple Extract pages for Employee or Positions. All information is display-only.

Here, the summary totals for all positions and jobs in an organization are displayed for each Extract ID - Scenario selected. In addition each predecessor organization is a link to drill down to the subordinate organizations.

Screen image



Query Multiple Extracts

Select one or more Extract ID, Scenario combinations and one or more Organizations. Select desired button.

Extract - Scenario: 2004 Approved-2005 PLUS 3
2004 Approved-3% COLA
2004 Approved-5% COLA

COA - Organization: B-01-President
B-10-Office of President
B-11-Vice President Academic Affairs

Include Subordinate Organizations: ☑

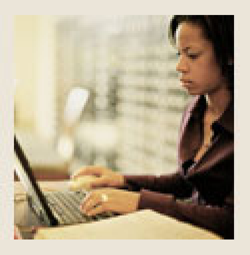
Number of Records per Page: 25

RELEASE: 7.0.0.1

Procedure

Follow these steps to query multiple extracts.

Step	Action
1	Select the **Query Multiple Query** link from the Salary Planner menu page.
2	Select a scenario in the **Extract – Scenario** field. <u>Note</u>: To select more than one scenario, hold the <Shift> key and click on a second scenario.
3	Select an organization in the **COA – Organization** field.
4	Click the **Include Subordinate Organization** checkbox if you want to view the subordinate organizations.



Section C: Day-to-Day Operations

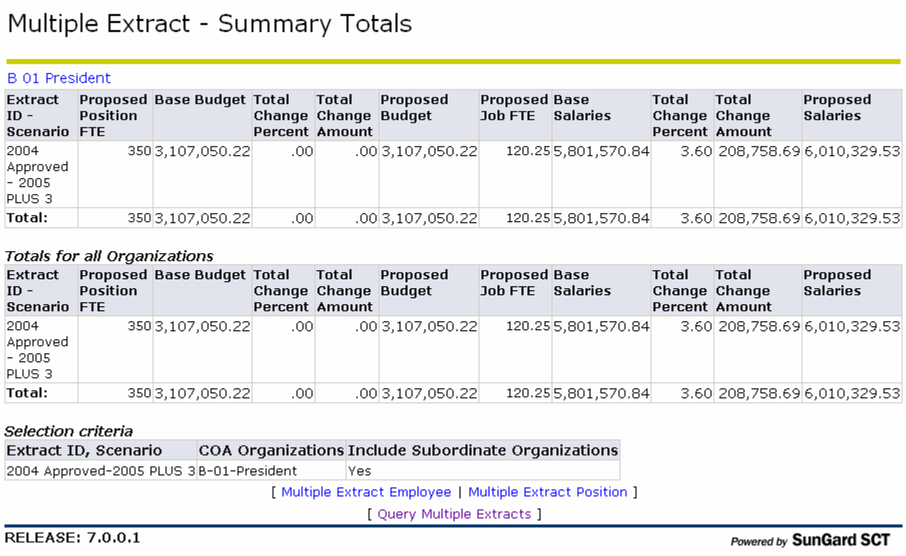
Lesson: Creating a Multiple Extract - Summary Totals (Continued)

Jump to TOC

Procedure, continued

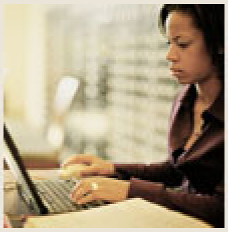
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Multiple Extract Summary Totals button.

<u>Result</u>: The Multiple Extracts – Summary Totals window opens with the results of your query displayed.


Multiple Extract - Summary Totals

B 01 President
<table>
<tr><th>Extract ID - Scenario</th><th>Proposed Position FTE</th><th>Base Budget</th><th>Total Change Percent</th><th>Total Change Amount</th><th>Proposed Budget</th><th>Proposed Job FTE</th><th>Base Salaries</th><th>Total Change Percent</th><th>Total Change Amount</th><th>Proposed Salaries</th></tr>
<tr><td>2004 Approved - 2005 PLUS 3</td><td>350</td><td>3,107,050.22</td><td>.00</td><td>.00</td><td>3,107,050.22</td><td>120.25</td><td>5,801,570.84</td><td>3.60</td><td>208,758.69</td><td>6,010,329.53</td></tr>
<tr><td>Total:</td><td>350</td><td>3,107,050.22</td><td>.00</td><td>.00</td><td>3,107,050.22</td><td>120.25</td><td>5,801,570.84</td><td>3.60</td><td>208,758.69</td><td>6,010,329.53</td></tr>
</table>
<i>Totals for all Organizations</i>
<table>
<tr><th>Extract ID - Scenario</th><th>Proposed Position FTE</th><th>Base Budget</th><th>Total Change Percent</th><th>Total Change Amount</th><th>Proposed Budget</th><th>Proposed Job FTE</th><th>Base Salaries</th><th>Total Change Percent</th><th>Total Change Amount</th><th>Proposed Salaries</th></tr>
<tr><td>2004 Approved - 2005 PLUS 3</td><td>350</td><td>3,107,050.22</td><td>.00</td><td>.00</td><td>3,107,050.22</td><td>120.25</td><td>5,801,570.84</td><td>3.60</td><td>208,758.69</td><td>6,010,329.53</td></tr>
<tr><td>Total:</td><td>350</td><td>3,107,050.22</td><td>.00</td><td>.00</td><td>3,107,050.22</td><td>120.25</td><td>5,801,570.84</td><td>3.60</td><td>208,758.69</td><td>6,010,329.53</td></tr>
</table>
<i>Selection criteria</i>
<table>
<tr><th>Extract ID, Scenario</th><th>COA Organizations</th><th>Include Subordinate Organizations</th></tr>
<tr><td>2004 Approved-2005 PLUS 3</td><td>B-01-President</td><td>Yes</td></tr>
</table>
[Multiple Extract Employee | Multiple Extract Position]
[Query Multiple Extracts]
RELEASE: 7.0.0.1

<u>Note</u>: You can click on any blue web link to view additional information about the selected item.</td></tr>
<tr><td>6</td><td>Click the Return to Menu link.</td></tr>
</table>



Section C: Day-to-Day Operations

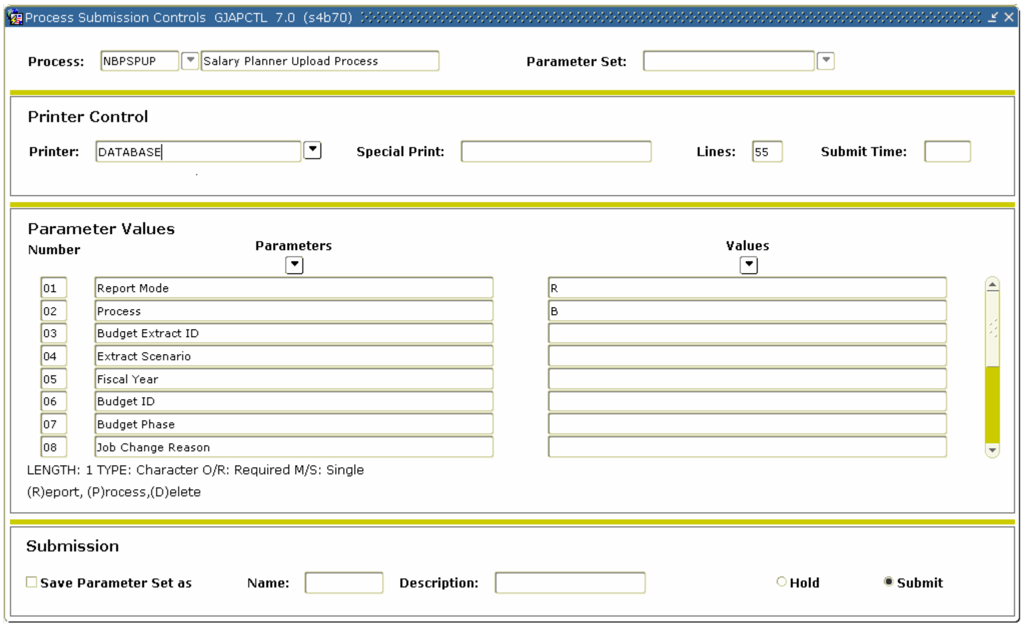
Lesson: Running the Salary Planner Upload Process

Jump to TOC

Introduction

Once you have created several scenarios in Salary Planner, one will be approved. The next step in the process is to upload the approved scenario back into Banner. The Salary Planner Upload Process (NBPSPUP) uploads position and job data from the Salary Planner application in Employee Self-Service to Banner. Position budget and position distributions will be uploaded into the related NBAPBUD Position Budget tables whereas job information will be uploaded by creating appropriate EPAFs in Banner. The relevant approval queues set up for the Approval Categories and Approval Types dictate how the job information and job labor distributions EPAFs get applied in Banner utilizing the NOPEAMA Mass Apply process or the Online Apply Process.

Banner form



Process Submission Controls GJAPCTL 7.0 (s4b70)

Process: NBPSPUP Salary Planner Upload Process **Parameter Set:**

Printer Control

Printer: DATABASE **Special Print:** **Lines:** 55 **Submit Time:**

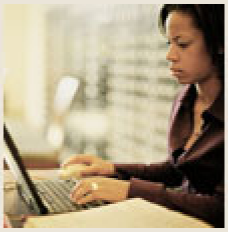
Parameter Values

Number	Parameters	Values
01	Report Mode	R
02	Process	B
03	Budget Extract ID	
04	Extract Scenario	
05	Fiscal Year	
06	Budget ID	
07	Budget Phase	
08	Job Change Reason	

LENGTH: 1 TYPE: Character O/R: Required M/S: Single
(R)eport, (P)rocess,(D)elete

Submission

☐ **Save Parameter Set as** **Name:** **Description:** ○ **Hold** ● **Submit**



Section C: Day-to-Day Operations

Lesson: Running the Salary Planner Upload Process

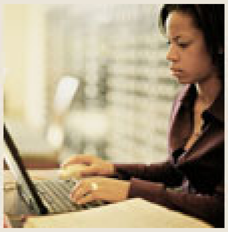
Jump to TOC

Procedure

Follow these steps to complete the report.

Step	Action
1	Access the Salary Planner Upload Process (NBPSPUP).
2	Enter the desired printer name in the **Printer** field. Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
3	Enter these parameter values.

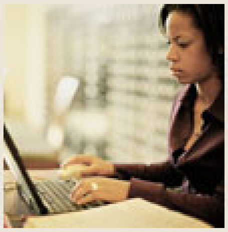
Parameter	**Description**
01: Report Mode	Enter *R* for report, *P* for process or *D* for delete.
02: Process	Required for report and process modes. Enter *P* for position, *J* for job or *B* for both.
03: Budget Extract ID	Enter the Budget Extract ID to upload from or delete scenario from.
04: Extract Scenario	Enter scenario to upload from or delete. Enter *%* to delete all scenarios.
05: Fiscal Year	Required if process is entered. Enter the fiscal year.
06: Budget ID	Enter Budget ID to update. Required for Process or Both mode if Finance is installed.
07: Budget Phase	Enter Budget Phase to update. Required for Process or Both mode if Finance is installed.
08: Job Change Reason	Enter Job Change Reason for updated job records. Required for Process or Both mode.
09: Include Waiting Records	Scroll and enter *N* or no or *Y* for yes.



Jump to TOC

Procedure, continued

Step	Action
4	Click the **Save Parameter Set as** checkbox.
5	Enter a name and description in the **Name** and **Description** fields.
6	Click the **Submit** radio button.
7	Click the **Save** icon to execute the report. Result: The Auto hint line displays the job submission number for the report log and list file.
8	Select **Review Output** on the Options menu to review the report.
9	Click the **Exit** icon.



Section C: Day-to-Day Operations

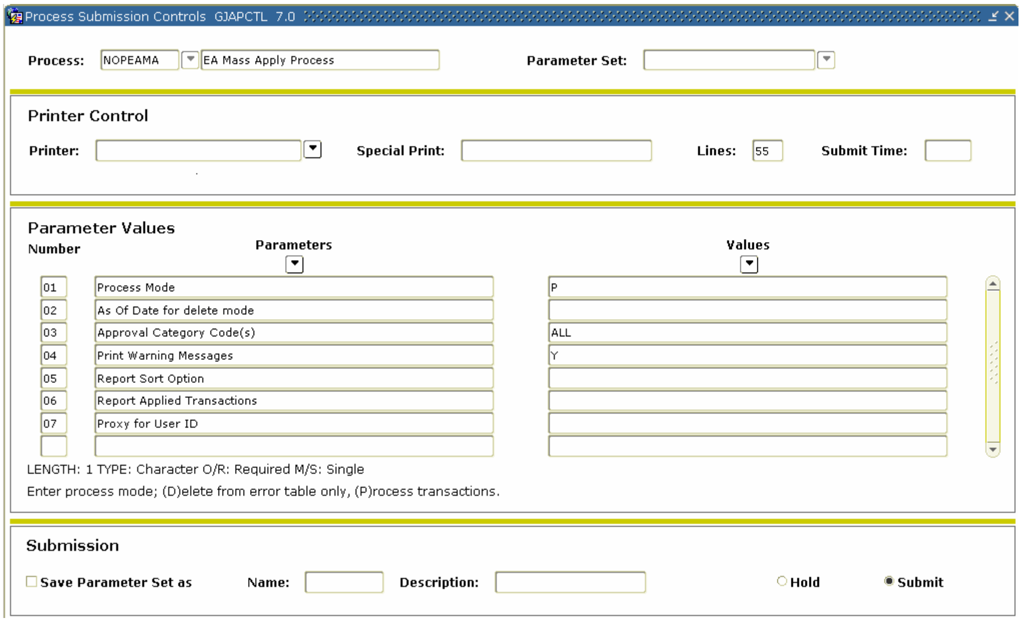
Lesson: Running the Mass Apply Process or Online Process

Jump to TOC

Introduction

The final step is to run the Mass Apply or On-line process (NOPEAMA). The Salary Planner Upload Process (NBPSPUP) is run to upload job information to EPAFS. The EA Mass Apply Process (NOPEAMA) is run to apply EPAF (job transactions) to be loaded to the jobs form (NBAJOBS).

Banner form



Process Submission Controls GJAPCTL 7.0

Process: NOPEAMA EA Mass Apply Process **Parameter Set:**

Printer Control

Printer: **Special Print:** **Lines:** 55 **Submit Time:**

Parameter Values

Number	Parameters	Values
01	Process Mode	P
02	As Of Date for delete mode	
03	Approval Category Code(s)	ALL
04	Print Warning Messages	Y
05	Report Sort Option	
06	Report Applied Transactions	
07	Proxy for User ID	

LENGTH: 1 TYPE: Character O/R: Required M/S: Single

Enter process mode; (D)elete from error table only, (P)rocess transactions.

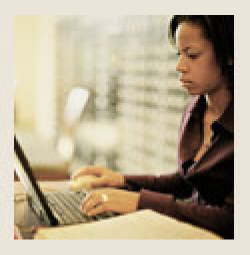
Submission

☐ **Save Parameter Set as** **Name:** **Description:** ○ **Hold** ● **Submit**

Procedure

Follow these steps to complete the report.

Step	Action
1	Access the Salary Planner Upload Process (NBPSPUP).
2	Enter the desired printer name in the **Printer** field. Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.



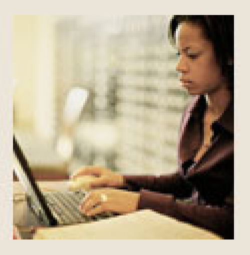
Jump to TOC

Procedure, continued

Step	Action
3	Enter these parameter values.

Parameter	Description
01: Proxy mode	Enter process mode. *D* for delete from error table only or *P* for process transactions.
02: As of Date for Delete mode	Enter date, format DD-MON-YYYY, to be used for delete from error table.
03: Approval Category Codes	Enter category codes to be processed or enter *ALL* to process all category codes.
04: Print warning messages	Enter *Y* for Yes or *N* for No.
05: Report Sort Options	Enter report sort option. *O* for originator or *C* for approval category.
06: Report Applied Transactions	Enter *Y* to include applied (error free) transactions on report.
07: Proxy for User ID	Enter user ID for which you are acting as proxy, if applicable.

4	Click the **Save Parameter Set as** checkbox.
5	Enter a name and description in the **Name** and **Description** fields.
6	Click the **Submit** radio button.
7	Click the **Save** icon to execute the report. Result: The Auto hint line displays the job submission number for the report log and list file.
8	Select **Review Output** on the Options menu to review the report.
9	Click the **Exit** icon.



Section C: Day-to-Day Operations

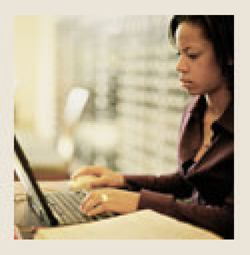
Lesson: Error Resolution Matrix

Jump to TOC

Introduction

New error messages and warning messages have been added to the following forms and process for the Salary Planner Enhancement.

Form/Process Message	Error/Warning	Resolution
NTRSPEX	*ERROR* This data has been saved to this Extract ID and may not be changed.	Extract data exists in the Salary Planner tables and may not be deleted. Use the Salary Planner Upload Process to delete Extract and all Scenarios. Return to NTRSPEX and delete rule record.
	ERROR New Budget Extract ID already exists, please re-enter.	Extract ID entered for New ID already exists. Enter a new unique Extract ID.
	ERROR Fiscal Year has not been defined; press LIST for valid codes.	Define Fiscal Year on the NBAFISC form.
	ERROR Employee Class must be saved before continuing.	Enter at least one employee class on the Employee Classes window.
	ERROR Date entered is outside of Fiscal Year.	Job Effective Date must fall within, and inclusive of, the begin and end date of the fiscal year defined on the main window.
	WARNING Budget Extract ID not found, Add assumed.	Acknowledge message and enter extract data. If Extract ID was entered in error, acknowledge message and then Exit the form.
	ERROR Budget Extract ID already exists in the working budget table.	Extract ID has already been used for an Initial Extract. Error will print on .lis report and the totals associated with the records in the Salary Planner table for the original Extract will be displayed.

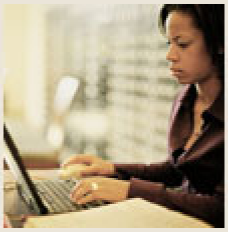


Introduction, continued

Form/Process Message	Error/Warning	Resolution
NBPSPEX	*ERROR* The following Salary Group/Table/Grade/ Step combinations are invalid:	Review NBAJOBS and NTRSALA records for valid Salary Group combinations. Make corrections on NBAJOBS.
	ERROR No matching budgets for extract rule specified.	Review the NTRSPEX form for the Extract Rule based on valid position information for COA, Fiscal Year, Budget ID, Phase and Budget Status.
NBPSPUP	Process parameter errors: *ERROR* Report Mode must be R,P, or D.	Enter the correct Report Mode for Report, Process or Delete.
	ERROR Process Mode must be P, J, or B when Report Mode is R or P.	Enter the correct Process Mode for Position, Job or Both
	ERROR Invalid Budget Extract ID.	Review Budget Extract IDs in Salary Planner for valid values and enter here.
	ERROR At least one scenario must be entered.	Enter a valid Scenario.
	ERROR Single Scenario required when uploading data	Review Scenarios in Salary Planner for valid values and enter here.
	ERROR Invalid Scenario	Review Scenarios in Salary Planner for valid values and enter here
	ERROR Invalid or Inactive Fiscal Year	Enter a valid Fiscal Year identified on NBAFISC.
	ERROR Invalid Budget ID/Phase for this fiscal year	Verify Budget ID or Phase identified on NBAPBUD and enter a valid value.
	ERROR Invalid Job Change Reason Code	Verify Job Change Reason Code and enter here.

Introduction, continued

Form/Process Message	Error/Warning	Resolution
NBPSPUP	Process Errors: *ERROR* Salary Planner not setup correctly on NTRINST.	Review NTRINST setup for identification of Approval Categories.
	ERROR User Needs Exactly One NTRROUT Apply Record for:<lists acat_code>	Process User needs to set up NTRROUT records for each Approval Category identified on NTRINST for Salary Planner processing.
	ERROR These organizations are unlocked, process aborted.	Review Organizations for locked status in Salary Planner. Rerun upload.
NBPSPUP	Position Upload Errors: *ERROR* Position begins after fiscal year ends	Correct the Begin Date of the position on NBAPBUD.
	ERROR Position budget must not be negative.	Correct Position Budget in Salary Planner and rerun upload.
	ERROR Position budget must be less than 999,999,999.99.	Correct Position Budget in Salary Planner and rerun upload.
	ERROR Position status is not active.	Correct Position status on NBAPBUD
	ERROR Labor Distribution Amounts do not total Position Budget.	Correct Position Budget records in Salary Planner and rerun upload.
	ERROR Labor Distribution Percents do not add up to 100.00%.	Correct Position Budget records in Salary Planner and rerun upload.
Note: EPAF errors related to data will be printed on report identifying employee, position/suffix, EPAF Transaction Number and error.		



Section C: Day-to-Day Operations

Lesson: Self Check

Jump to TOC

Directions

Use the information that you just learned to complete the following questions.

Question 1

The Create Scenario page is accessible only to those employees who have been designated as Master Salary Planners in the WebTailor application.

True or False

Question 2

Both HR Managers and Master Salary Planners can use the copy scenario functionality to copy all changes from one scenario to another.

True or False

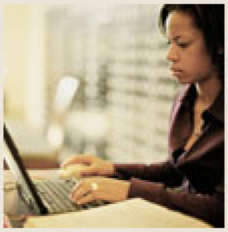
Question 3

What page is used to select a Budget Extract ID and scenario for viewing/editing?

create scenario
copy scenario
edit scenario

Question 4

What are the two types of access given to salary planner users utilizing the organizational lock functionality?



Question 5

The Organizational Lock page allows users to change the current lock status of an organization for a selected Extract ID/scenario combination.

True or False

Question 6

Which screen would you access to have each organization displayed as a separate table, within each extract ID/scenario?

Question 7

All information on the Multiple Extracts-Positions page is display only.

True or False

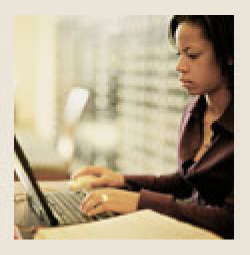
Question 8

One what screen are all summary totals for all positions and jobs in an organizations are displayed for each Extract ID/scenario selected.

Question 9

The position filters page is used to further refine the positions and jobs displayed on all subsequent pages in the Salary Planner.

True or False



Question 10

This page displays a list of search criteria that can be specified to locate an employee in a specific budget scenario.

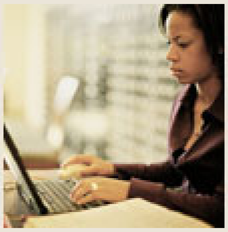
Question 11

The Search Results page displays the job and salary information of each employee for all positions that met the filter criteria entered on the Position or Employee Filter page.

True or False

Question 12

Salary Planner users can use this page to access and review all positions held by an employee in one or more organization.



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check

Jump to TOC

Question 1

The Create Scenario page is accessible only to those employees who have been designated as Master Salary Planners in the WebTailor application.

True

Question 2

Both HR Managers and Master Salary Planners can use the copy scenario functionality to copy all changes from one scenario to another.

True

Question 3

What page is used to select a Budget Extract ID and scenario for viewing/editing?

create scenario
copy scenario
edit scenario

Question 4

What are the two types of access given to salary planner users utilizing the organizational lock functionality?

Update Access and Query Access

Question 5

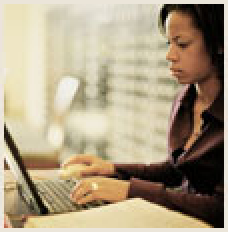
The Organizational Lock page allows users to change the current lock status of an organization for a selected Extract ID/scenario combination.

False - The Change Organizational Lock page allows users to change the current lock status of an organization for a selected Extract ID/scenario combination.

Question 6

Which screen would you access to have each organization displayed as a separate table, within each extract ID/scenario?

Multiple Query Extracts – Employee



Question 7

All information on the Multiple Extracts-Positions page is display only.

True

Question 8

One what screen are all summary totals for all positions and jobs in an organizations are displayed for each Extract ID/scenario selected.

Multiple Extracts Summary Totals

Question 9

The position filters page is used to further refine the positions and jobs displayed on all subsequent pages in the Salary Planner.

True

Question 10

This page displays a list of search criteria that can be specified to locate an employee in a specific budget scenario.

Employee Filter Page.

Question 11

The Search Results page displays the job and salary information of each employee for all positions that met the filter criteria entered on the Position or Employee Filter page.

False. **The List by Employee page displays the job and salary information of each employee for all positions that met the filter criteria entered on the Position or Employee Filter page.**

Question 12

Salary Planner users can use this page to access and review all positions held by an employee in one or more organization.

Employee Detail Page

Section D: Reference

Lesson: Overview

Jump to TOC

Introduction

The purpose of this section is to provide reference materials related to the workbook.

Section contents

Section D: Reference

Lesson: Set Up Forms and Where Used

Jump to TOC

Guide

Use this table as a guide to the set up forms and the day-to-day forms that use them.

Set Up Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Organization Code Validation Form	PTVORGN		
Organization Code Maintenance Form	FTMORGN		
Position Control Installation Rule Form	NTRINST	List by employee page in Banner Self Service	
Installation Rule Form	PTRINST		
User Codes Rule Form	PTRUSER		
Employer Security Form	PSAEMPR		
Employee Class Security Form	PSAECLS		
Organization Security Form	PSAORGN		
Salary Planner Security Form	NSASPSC		
Electronic Approval Category Rules Form	NTRACAT		
Electronic Approval Routing Rule Form	NTRROUT		
Budget Profile Validation Form	NTVBPRO		
Position Budget Form	NBAPBUD		
Job Change Reason Rule Form	PTRJCRE	List by employee page in Banner Self Service	
Salary Planner Extract Rules Form	NTRSPEX		

Section D: Reference

Lesson: Day-to-Day Forms and Set Up Needed

Jump to TOC

Guide

Use this table as a guide to the day-to-day forms and the set up forms needed for each.

Day-to-Day Form	Set Up Forms Needed
List by Employee page in Banner Self Service	• Position Control Installation Rule Form (NTRINST) • Job Change Reason Rule Form (PTRJCRE)

Section D: Reference

Lesson: Forms Job Aid

Jump to TOC

Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
PTVORGN	Organization Code Validation Form	
FTMORGN	Organization Code Maintenance Form	
NTRINST	Position Control Installation Rule Form	
PTRINST	Installation Rule Form	
PTRUSER	User Codes Rule Form	
PSAEMPR	Employer Security Form	
PSAECLS	Employee Class Security Form	
PSAORGN	Organization Security Form	
NSASPSC	Salary Planner Security Form	
NTRACAT	Electronic Approval Category Rules Form	
NTRROUT	Electronic Approval Routing Rule Form	
NTVBPRO	Budget Profile Validation Form	
NBAPBUD	Position Budget Form	
PTRJCRE	Job Change Reason Rule Form	
NTRSPEX	Salary Planner Extract Rules Form	

Release Date

Jump to TOC

This workbook was last updated on 05/26/2006.