A Guide to the Features of Salary Planner

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NOTE: This Guide to the Features of Salary Planner is intended as a reference for operating Salary Planner. Many options are not used by Texas Tech, and the novice can easily make mistakes. Unused options are clearly marked. For a simple job aid about what you can do, see the Steps to Follow for Salary Planner, where the cover page is an easy outline to follow.

A. INTRO TO SALARY PLANNER

A.1 On the A&F Work Tools Tab in RaiderLink, click the Budget Prep link (Budget Office Channel).

A.2 Salary Planner
A.3 Edit Scenario: Choose the desired FY. The example below is for FY2012 where Extract ID = TTU FY2012, Scenario = T12SAL. Select Position Attributes as the Filter Criteria.

A.4 Position Filters
Complete your choices. To “Start with Employees”, do not List by Position. You can display the List of Employees (item A.5) or display Summary Totals for your organization (item A.6). Do not choose Employee Filter (Employee Name search), item A.6
A.5 Summary Totals

Summary Totals

Select an Organization to display subordinate organizations.

<table>
<thead>
<tr>
<th>Organization</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 FTE</th>
<th>Base Salary</th>
<th>Total Change Percent</th>
<th>Total Change Amount</th>
<th>Proposed Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atmospheric Science</td>
<td>3.5</td>
<td>126.00</td>
<td>.00</td>
<td>.00</td>
<td>126.00</td>
<td>1.5</td>
<td>121.21</td>
<td>.00</td>
<td>.00</td>
<td>121.21</td>
</tr>
<tr>
<td>Total:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TTU FY2010 Extract - T10SAL

List by Position: Go to Section C, “Working with Positions”
List by Employee: Go to Section B, “Starting with Employees”

A.6 Employee Filter. Search by either First Name, or Last Name, or an R#. The search takes you to Section B “Working with Employees”, screen Employee Detail, item B.2.

The Employee Filter is more useful AFTER entering/editing employees. When you need to review one employee, the Employee Filter allows you to go directly to that employee.
A.7 Self Study Exercise “Getting Acquainted with Totals, Employee Lists, and Position Lists”

- Complete the Position Filter item A.4, and click Summary Totals. Your objective is to view the ‘big picture’ structure of Salary Planner and learn names of the key links (buttons).
  - Compare Position Totals to Employee Totals, item A.5
  - Click List by Employee to see the employees; find the Summary Totals link to return (or the Position Filter link to restart this Bullet sequence).
  - Click List by Position to see the positions; find the Summary Totals link to return (or the Position Filter link to restart this Question).
  - You should now be familiar with the employee side of Salary Planner versus the position side, and with the terms Position Filter, Summary Totals, List by Employee, and List by Position.

- Complete the Position Filter item A.4, this time using an Employee Class Code. Your objective is to determine if it will be beneficial to see/work your employees in sub-groups. Click Summary Totals.
  - Compare Position Totals to Employee Totals, item A.5. Are the totals a sub-set of the totals you viewed in the previous bulleted sequence? Position totals are reflected in your budget in Budget Development.
  - Click List by Employee to see the employees. Is the list a sub-set of the list you viewed previously? Find the Summary Totals link to return (or the Position Filter link to restart this Bullet sequence).
  - Click List by Position to see the positions. Is the list a sub-set of the list you viewed previously? Find the Summary Totals link to return (or the Position Filter link to restart this Question).

Notes for yourself:
B. PART 1 - STARTING WITH EMPLOYEES

B.1 List by Employee

Do not make entries on this screen. Click employee ID and Name to make entries to the employee.
B.2 Employee Detail

Use this screen as the worksheet for the employee.

If a Merit Policy is approved, this screen will be used for merit amount/percent entry. Otherwise no entries should be made on this screen – for salary/FTE verification only.
B.2.a Distribution (Employee/Job Labor Distribution)

**Current**

<table>
<thead>
<tr>
<th>COA Index Fund</th>
<th>Organization Account</th>
<th>Program Activity Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>120027</td>
<td>853351</td>
<td>6A4401</td>
<td>200</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>786.46</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>786.46</td>
</tr>
</tbody>
</table>

**FY10 for this employee**

**Proposed**

<table>
<thead>
<tr>
<th>COA Index Fund</th>
<th>Organization Account</th>
<th>Program Activity Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>120027</td>
<td>853351</td>
<td>6A4401</td>
<td>200</td>
<td>100.00</td>
<td>786.46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>786.46</td>
</tr>
</tbody>
</table>

**FY11 for this employee**

**Proposed Position Distribution**

<table>
<thead>
<tr>
<th>COA Index Fund</th>
<th>Organization Account</th>
<th>Program Activity Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>120027</td>
<td>853351</td>
<td>6A4401</td>
<td>200</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100.00</td>
<td>9,319.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9,319.00</td>
</tr>
</tbody>
</table>

- Add a new record
- Always copy Job to Position after editing FOAPs or %’s.
- Edit/Remove this FOAP, item B.2.a.1
- Copy Position Distribution to Job
- Copy Job Distribution to Position
B.2.a.1 Account Distribution for the Employee  This screen is used to enter or remove FOAPs or edit Percents.

<table>
<thead>
<tr>
<th>Account Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Distribution</strong></td>
</tr>
<tr>
<td><strong>Name and ID:</strong></td>
</tr>
<tr>
<td><strong>Position-Suffix and Title:</strong></td>
</tr>
<tr>
<td><strong>COA:</strong></td>
</tr>
<tr>
<td>Index:</td>
</tr>
<tr>
<td>Fund:</td>
</tr>
<tr>
<td>Organization:</td>
</tr>
<tr>
<td>Account:</td>
</tr>
<tr>
<td>Program:</td>
</tr>
<tr>
<td>Activity:</td>
</tr>
<tr>
<td>Location:</td>
</tr>
<tr>
<td>Project:</td>
</tr>
<tr>
<td>Cost Type:</td>
</tr>
<tr>
<td>Percent:</td>
</tr>
<tr>
<td>Amount:</td>
</tr>
</tbody>
</table>

- Enter/Edit the FOAP, or edit the Percent
- SAVE the entries
- RETURN the displayed FOAP
- Return to Job Labor Distribution, item B.2.a

**RELEASE: 7.3.1.1**

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B.2.b Comments (Stored with Job record)
B.3 Self Study Exercise

- In preparation for Section B “Part 1 - Starting with Employees”, look at the drill down of screens you will use for employee entry. Complete the Position Filter and click List by Employees.
  - Choose an employee and click the employee Name link to access the Employee Detail.
  - Find the links at the right of the heading:
    - Click **Job Detail**. You will not use this worksheet, see item D.1 Return to Employee Detail.
    - Click **Distribution** to see the Job Labor Distribution for the employee. Here is where you will add/remove FOAPs and revise Percents for the employee’s job. Return to Employee Detail.
    - Click **Comments** to see where you can add comments about an employee; return to Employee Detail.
    - Click **Position Detail**. You will not use this worksheet, see item D.2 Your return choices (the Employee Detail link is not available) are
      - List by Employee to restart this bulleted sequence.
      - Employee. See link in discussion below, section C “Part 2 - Ending with Positions.”
    - Congratulations! You have viewed the screens in the Employee drill-down.

- What report/worksheet will you use as a reference to enter salary increases?

- Will the worksheets copied down from Excel work for you?

- Do you have a list of employees and FOAPs as they are currently paid?
C. PART 2 - ENDING WITH POSITIONS

C.1 List by Position

**List By Position**

- **Do Not Use Mass Change or Mass Apply**

- **DISTRIBUTION: FOAP Add/Remove, item C.1.a**

- **COMMENTS: Regarding the position, C.1.b**

- **EMPLOYEE: View Employees appointed to this position, item C.1.c**

- **Pooled Position: Enter FTE, Change % or amount, see E.2**

- **Vacant Position: Enter Change % or amount, not FTE, E.3**

- **SAVE: Save your entries.**

- **RESET: Clear entries since last SAVE.**
C.1.a Distribution (Position Distribution)

The FOAP distribution is displayed for the position. This screen should only be used to view the FOAP distributions of the employees appointed to a pooled position, or to make changes to the funding source of a pooled/vacant position.
C.1.a.1 Account Distribution for Position  Enter or edit FOAP for the position.

Account Distribution

Add or change an Account Distribution component and select Save. You may choose an Account Distribution component button to query values.

Budget Distribution for Position T94088.

COA:  T

Index:  120027
Organization:  693597
Account:  644401
Program:  200
Activity:  
Location:  
Project:  
Cost Type:  

Percent:  100.00
Amounts:  329.00

Enter/Edit the FOAP, or edit the Percent
SAVE the entries
REMOVE the displayed FOAP

Return to Position Distribution, item C.1.a
C.1.b Position Comments

Position Comments

Position and Title: T94008 Graduate Assistant
Last Updated by: Lisa Gay Mills
Last Updated on: May 04, 2009
Comments:

Save Reset

List By Position | Position Detail
C.1.c Employees (appointed to this position)

The Proposed employee salaries are displayed for the position. The list is useful when reviewing pooled positions; it should not be used for entries because the employee entries were made during B. Part 1 – Starting with Employees.
C.2 Self Study Exercise

- This review will assist you in looking at the drill down of screens you will use for position entry. Complete the **Position Filter** and click **List by Position**. Find the links at the right of the heading:
  - Click **Distribution** to see the Job Labor Distribution for the position. Here is where you will add/remove FOAPs and revise Percents for the position. Return to List by Position.
  - Click **Comments** to see where you can add comments about an employee; return to List by Position.
  - Click **Employee**. This is a “list of employees” appointed to this position (NOTE: it is NOT the List of Employees created by the Position Filter!). Return to List by Position.
  - Congratulations! You have viewed the screens in the Position drill-down.

- Do you have a list of positions for your department? Do you know which positions in your department go in the Budget Book and which ones do not?

- Do you know what FOAP distribution you want on the positions?

- Do you know what FOAPs and Salaries you want to put on vacant positions?

- Do you know what FTE, Salaries, and FOAPs you want to put on pooled positions?
D. Screens NOT Used

D.1 Job Detail  You have arrived at this screen in error.  Choose a link at the bottom to return to another screen.

![Job Detail Screen](image-url)
D.2 Position Detail  You have arrived at this screen in error. Choose a link at the bottom to return to another screen.
E. OPERATIONAL PROCEDURES

E.1 Lock
The Lock closes all organizations below you to entry, but your level stays open for entry. Your first action before getting started is to lock the organizations below your level so that no more entries can be made. There is no email notification when your organization is locked. You and your chain of command must communicate. NOTE: Level 7, the lowest level of the organization, does not need to lock.

E.2 Pooled Positions
You will review Pooled Positions after verifying employee salaries and labor distributions. You may increase or decrease FTE on a pooled position to reflect your plans for the new fiscal year, as well as the respective position budget amounts.

E.3 Vacant Positions
You may edit salaries on vacant positions, but not FTE. A vacant position must have an active FOP. If the vacant position is a research position and the grant will be active on September 1, the FOAP may be a research FOP. However, if the grant will end before September 1, then the position must be assigned a FOAP that will be active on September 1.

E.4 Grants and Budgets NOT in the Operating Ledger Budget
Employees paid from grants and other FOPs not in the permanent fiscal year Operating Budget must be verified in Salary Planner; however, no budgeting is required in Budget Development for these FOPs.

E.5 Overload Jobs
All salaries for “overload” jobs (listed as “other jobs” in SP) cannot be updated in Salary Planner, but should always be budgeted in budget pool 6Z1 (contingency) of your FOAPs in Budget Development.
F. A QUICK REFERENCE TO SALARY PLANNER

A. Intro to Salary Planner

A.1 Budget Prep Menu
A.2 Salary Planner
A.3 Edit Scenario: Choosing the Scenario and Filter Criteria.
   By Position Attributes: DESIREABLE Use the “Position Filter”, step
   By Employee Name: LESS DESIREABLE Use the “Employee Filter” to search by Employee Name or R#
A.4 Position Filter: Choose organization(s), list employees by Employee Class Code(s), include or exclude vacant and/or
   pooled positions. See the results by
   List by Employee  Summary Totals  List by Position
   Employee: follow section B “Part
   1 - Starting with Employees”
   Totals for the organization of
   both positions and employees: See item A.5
   Position: follow section C “Part
   2 - Ending with Positions”
A.6 Employee Filter
A.7 Self-Study Exercise

B. Part 1 - Starting with Employees

B.1 List by Employees
   From the list, click employee name
B.2 Employee Detail
   Enter merit (?) or click a link to:
   B.2.a Employee Distribution
      Click link to Add/Remove FOAPs, B.3.a
      Upon return, copy FOAP to Position:
      Copy Job Distribution to Position
   B.2.a.1 Account Dist., FOAP Add/Edit
      Edit Distribution, return to B.2.a to
      copy Employee FOAP to Position
   B.2.b Employee Comments, if desired.
B.3 Self-Study Exercise

C. Part 2 - Ending with Positions

C.1 List by Position
   Do not edit salaries on single positions.
   Review/update Vacant and Pooled Salaries per
   Operational Procedures, E.2 – E.3. Click links to:
   C.1.a Position Distribution
      Click link to Add/Remove FOAPs, C.1.a.1
      Account Distribution
      Edit Distribution, return to C.1.a
   C.1.b Position Comments
   C.1.c Employees (appointed to this position)
C.2 Self-Study Exercise

D. Screens NOT Used
D.1 Job Detail
D.2 Position Detail