

BUDGET PLANNER

SALARY PLANNER



SP-101 Apply Annual Increases In Salary Planner – Regular Staff

Date Issued/Rev: 03/23/2010

General Description: This procedure explains how departments/end users will access and apply annual increases to regular staff jobs in Salary Planner using LoboWeb.

Responsible Departments: Office of Planning, Budget, & Analysis and HR

IMPORTANT INFORMATION: A salary planner role [Department Salary Planner] with appropriate security is required before beginning this procedure. If this role has not been requested and approved, go to my.unm.edu and link on [Banner Authorization Requests](#).

Process Steps:

Update the Regular Staff Scenario

- Enter LoboWeb through the URL my.unm.edu
- Log in with your Net ID and Password
- Click on “Employee Life.”
- Under Banner Applications, click on the “LoboWeb”
- Select the “Finance” Main Menu tab or Click on “Finance Menu” link
- Click on “Budget Planner Menu.”
- Click on “Salary Planner Menu.”
- Click on “Edit Scenario.”

Student Financial Aid **Employee** Payment Finance

Search Go RETURN TO SALARY PLANNER MENU

Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID: RSTAFF11

Scenario: REG STAFF 11

Filter Criteria

By Position Attributes:

By Employee Name:

Select

- Choose RSTAFF11 as the Extract ID.
- Filter Criteria set to Position Attributes.
- Click “Select.”

UNM FastInfo Find help about: within: Student Faculty/Staff Search

[Create Scenario | Copy Scenario | Organization Lock | Query Multiple Extracts | Salary Planner Reports Menu | Budget Planner Menu]

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Student Financial Aid **Employee** Payment Finance

Search (Go) RETURN TO MENU SITE MAP HELP EXIT

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

RSTAFF11, REG STAFF 11

Organizations: (dropdown menu with 032M - Chem Stores, 037A - Student Health and Counseling)

Include Subordinate Organizations:

Employee Class: (dropdown menu with SE - Exempt Staff, SN - Non-Exempt Staff)

Bargaining Unit: (dropdown menu with None)

Faculty Rank: (dropdown menu with None)

Include Pooled Positions:

Include Vacant Positions:

Number of Records per Page: (dropdown menu)

[Employee Filter](#)

UNM FastInfo Find help about: within: Student Faculty/Staff Search

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- Choose the Organization or select "All."
- Include Subordinate Organizations, Pooled and Vacant Positions.
- Select "All" for Employee Class, Bargaining Unit, and Faculty Rank.
- Click "List By Employee."

Note: There will be no Bargaining Unit employees, Faculty employees, or Pooled Positions in the Regular Staff Scenario. These employees and positions are in separate scenarios.

Note: If wanting to update Vacant Positions within the Regular Staff scenario, click "List By Position" instead of "List By Employee." On the [List by Position](#), vacant positions will appear with -0- in the "Estimated Fiscal Year Budget" column to the far right. This number is based on the salary of the job that has been attached to this position number. Since there is no incumbent (vacant position), the number will be -0-. There **will** be an amount in the "Proposed Budget" column. This is the position budget amount as set up in HR.

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

Hourly or Salary: (dropdown menu)

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

[Jump to Bottom](#)

- Set Hourly or Salary field to "Both."
- To "Mass Apply" a percentage increase to all employees in the selected scenario, enter the percentage increase in the Annual Salary Increase Percent field. Example: 3 if 3% increase or 2.25 for a 2.25% increase.
- Click "Mass Apply."
- Scroll to the bottom or follow the "Jump to Bottom" link.
- Click "Save" at the bottom of the page.

NOTE: All employee records for the selected organization code and scenario will be changed even if there are a limited number displayed on the screen.

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

Hourly or Salary:

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

[Jump to Bottom](#)

To apply an individual increase that is to be different from the average, follow the link for the individual under the ID and Name Column on the "List by Employee" page.

ID and Name	Position, Appointment Salary Suffix Percent	Base Appointment Salary Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount
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[102999000](#)
[Bennett, William](#) [S99999-00](#)
[Accountant II](#)

DO NOT attempt to make changes by following the link under [Position, Suffix, & Title](#) from the "List by Employee" page. This will take you to the "Job Detail" page where NO changes should be made.

Employee Detail

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

Mass Change

Hourly or Salary:

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

NOTE: Even though the button says MASS APPLY it will only apply this increase to the one individual that is listed because this is the "Employee Detail" page.

On the "Employee Detail" page:

- Input in the fields an amount OR percentage increase at the top of the page where it says, "Annual Salary Increase".
- Click the button MASS APPLY.
- Click the button SAVE at the bottom of the page.

Extracted Jobs

Position Suffix and Title	Organization	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Annual Salary Increase Percent	Annual Salary Amount
S99999-00 Accountant II	032M-- Chem Stores	100.00	100.00	99,415	.00	.00

DO NOT attempt to make changes in the body under the heading, "Extracted Jobs."

ed Salary	Links
43,246.06	Job Detail Distribution Comments Position Detail

To change a labor distribution, from the "Employee Detail" page, click on the Distribution link.

NOTE: Labor distributions must equal 100% and are to be input as they are to be charged on July 1st.

NOTE: Any valid index, whether unrestricted or restricted, may be used for the labor distribution.

Index, Fund and Org will display here

Current												
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount	
U			2020	P181	GNACTV					100.00	51,947.96	
Total										100.00	51,947.96	
Proposed												
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount	Del
U			2020	P181	GNACTV					100.00	54,545.36	X
Total										100.00	54,545.36	

Add New Record

Index, Fund and Org will display here

- Under the heading "Proposed", you can change the index or percentage distribution if needed. Click Save after making changes.
- Click on the ADD NEW RECORD to add a new index. Input the new index code, account code, percentage and click Save.
- If any index is not to be used on July 1st, click the DEL button to remove the index, adjust your distribution percentages and click Save.

NOTE: Total Labor Distributions must equal 100% before you can save the record. A distribution amount may not be changed. Banner HR labor distributions are changed by percentage only.

Index, Fund and Org will display here

Current											
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
U			2020	P181	GNACTV					100.00	51,947.96
										Total	100.00 51,947.96

Proposed												
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount	Del
U			2020	P181	GNACTV					100.00	54,545.36	X
										Total	100.00	54,545.36

Add New Record

Proposed Position Distribution											
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
U			2020	P181	GNACTV					100.00	54,545.00
										Total	100.00 54,545.00

Save Copy Position Distribution to Job Copy Job Distribution to Position

After the final adjustment to the labor distributions are made to the individual, click the button COPY JOB DISTRIBUTION TO POSITION. This will copy the job distributions to the position distributions.
NOTE: Job distributions and position distributions should be the same.

*** END ***