



## BUDGET PLANNER SALARY PLANNER



### SP-102 Apply Annual Increases In Salary Planner – Bargaining Units

Date Issued/Rev: 03/24/2010

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

**Responsible Departments:** Division of Human Resources

**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](http://my.unm.edu) and link on [Banner Authorization Requests](#) site and apply for the appropriate role.

#### How to Budget for Bargaining Units

1. Logon to [my.unm.edu](http://my.unm.edu)
2. Select the “Employee Life” tab
3. Click on “LoboWeb”
4. Select the “Finance” tab
5. Click on the “Budget Planner Menu”
6. Click on “Salary Planner Menu”
7. Click on “Edit Scenario”
8. **Extract ID and Scenario:** Click on the down arrow to select the extract ID of the bargaining unit to be edited during the current session. **NOTE:** Each bargaining unit is in a separate Extract ID and Scenario. The options are CWA Barg Unit, Police Barg Unit, and USUNM Barg Unit.
9. **Filter Criteria:** Click on the radio button for “Position Attributes.”

### Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

#### Scenario Selection

Extract ID:

Scenario:

Select Extract ID: CWA11, Police11 or USUNM11

#### Filter Criteria

By Position Attributes:

By Employee Name:

Select

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

10. Click on "Select"

### Position Filters

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

CWA11, CWA BARG UNIT 11

Organizations:   
 027A - Assoc VP Stu SvcCollege Enrich Prgm  
 028A - CASAA Department

Include Subordinate Organizations:

Employee Class:   
 SW - CWA Bargaining Unit

Bargaining Unit:   
 C1 - CWA - Maintenance & Operations  
 C3 - CWA - Clerical

Faculty Rank:   
 None

Include Pooled Positions:

Include Vacant Positions:

Number of Records per Page:

Select the org code or ALL

Check or uncheck subordinate Orgs

Select All or employee class

Select All or Bargaining Unit

Select All or None

Boxes are checked


Select records to be displayed on page

Click on LIST BY EMPLOYEE


List By Employee Summary Totals List By Position

Employee Filter

## 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](#)

- 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:** For Bargaining Unit employees, you may only apply the average increase. The actual increases will be applied based on union negotiations at the time negotiations are complete. By applying the average increase, a budgeted "reserve" will be applied at the position level to departmental index budgets.

**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.

ID and Name	Position, Appointment Salary	Base Appointment	Proposed	Base	Change	Change Amount
	Suffix Percent	Percent	App	App	Percent	
	and Title		Per	Per		
<a href="#">102xxxxx Bennett, William</a>	<a href="#">S99999-00 Admin Assistant III</a>					

To change a labor distribution for an employee, follow the link for the individual under the ID and Name Column on the "List by Employee" page.

**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 **only FTE** changes should be made.

# Employee Detail

**i** Enter a Mass Change and select Mass Apply, or modify an individual Job record. Select Save before accessing another 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 Admin Assistant III	09X-Organization of Applied Genre	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	<a href="#">Job Detail</a> <a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Position</a> <a href="#">Detail</a>

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 1<sup>st</sup>.  
**NOTE:** Any valid index, whether unrestricted or restricted, may be used for the labor distribution.

**Current**

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

Add New Record

- 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 1<sup>st</sup>, 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		2060	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		2060	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		2060	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 \*\*\*