

Salary Increase Program Faculty Compensation Export Function

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Salary Increase Program Faculty Compensation Export Function (cont'd)

How to Use the Faculty Compensation Export Function

- ✓ **Login** to PennWorks with your PennKey and password
- ✓ **Confirm** that you have the 'Salary Increase Program Faculty Compensation Export' access role for the ORGs you require.
 - Check the left navigation bar and make sure that you see the 'Faculty Compensation Export' link under the heading 'Salary Increase Program' then click the link.
 - Check the Home School/Center and Home ORG fields and confirm that you can see only the ORGs in your approved ORG range.

The screenshot shows the PennWorks interface for the 'Salary Increase Program Faculty Compensation Export' function. On the left, a navigation menu is visible with a yellow arrow pointing to 'Faculty Comp Export' under the 'Salary Increase Program' heading. The main content area displays the export configuration page. It features two dropdown menus: 'Home School/Center' and 'Home ORG'. The 'Home School/Center' dropdown is currently open, showing a list of available options: '00 GENERAL UNIVERSITY', '02 SCHOOL OF ARTS AND SCIENCES', and '04 PROVOST INTERDISCIPLINARY PROG'. The 'Home ORG' dropdown is also open, showing options: '0001 GENERAL UNIVERSITY SURROGA', '0007 GENERAL UNIVERSITY EB POOL', and '0030 LEARNING ALLNCE FOR HIGHER E'. Below these dropdowns are 'Execute report' and 'Clear' buttons. The page title is 'Salary Increase Program :: Faculty Compensation Export' and includes a warning about using Secure Share for distributing exported spreadsheets.

- ✓ **Download** everybody in your ORG(s) into an Excel spreadsheet and then 'slice and dice' the group into the usual smaller groups to hand to persons authorized to do the modeling
- ✓ **Click** the 'Execute Report' button.
- ✓ **Review** the results to confirm that you have the correct group.
- ✓ **Click** the 'Export as xls' link and save the resulting file. (see below for all of the columns/data included in the download since they are numerous)

Salary Increase Program Faculty Compensation Export Function (cont'd)

Salary Increase Program :: Faculty Compensation Export

You MUST use [Secure Share](#) or a secure departmental server to distribute the exported spreadsheets which contain financial information. This is required by the university for security purposes. Don't use email! (For more information [here](#)).

This report/export is a snapshot of current data. For general help on this report, access the help documentation at the top of this page.

Salary Increase Program Faculty Compensation Export
 A report on faculty compensation that can be filtered and exported to a spreadsheet.

Home School/Center in Available: 00 GENERAL UNIVERSITY, 02 SCHOOL OF ARTS AND SCIENCES, 06 SCHOOL OF NURSING. Selected: 04 PROVOST INTERDISCIPLINARY PROG

Home ORG in Available: 0001 GENERAL UNIVERSITY SURROGA, 0007 GENERAL UNIVERSITY EB POOL, 0030 LEARNING ALLNCE FOR HIGHER E. Selected:

Penn ID equals

Execute report Clear

Listings: 1-1 of 1 [Export as xls](#)

Home school center	Home school center name	Home org	Home org name	Penn id	Last name	First name	Cu
04	PROVOST INTERDISCIPLINARY PROG	0416	FACULTY COMMITMENTS	10036319	HERSHBERG	THEODORE	14

Result page: 1

Filter Values:
Home School/Center = 04

✓ **Copy and paste** the filters used for your report, which are visible on the screen BELOW the results.

✓ **Use** a secure method of sharing and transferring files, such as Secure Share, to distribute the exported spreadsheets which contain confidential financial information. This is required by the University for security purposes.

✓ Faculty Compensation components should be updated on the spreadsheet based on the coming FY commitment to the faculty member, in accordance with the practices outlined in pages 5-11 of [Setting Up and Maintaining Faculty Records in PennWorks](#)
 <http://www.finance.upenn.edu/ftd/documentation/Setting_Up_and_Maintaining_Faculty_Records.pdf>

Salary Increase Program Faculty Compensation Export Function (cont'd)

What is Salary Increase Program Faculty Compensation Export?

Faculty Compensation Export will allow Home ORG users to generate Excel spreadsheets to facilitate the collection of information about faculty compensation components. This function replaces the spreadsheets previously distributed by the Compensation Office of Human Resources at the beginning of the SALINC process in April. Designated School/Center Salary Increase coordinators can use this function to download current faculty compensation information for groups of faculty. NOTE: Users will only be able to export the ORG ranges specifically assigned to them in PennWorks. Key Features and Benefits of Salary Increase Program Faculty Compensation Export

- Immediate access to most current information and ability to export most current information at any time
- Flexibility in exporting spreadsheets (Schools may choose a single designee or allow individual BAs to export)

Filters/Parameters and Tips on Using Them

Filter Name	Description
Home School / Center	Displays only the school/centers based on the user's access.
Home ORG	Displays only the ORG(s) based on the user's access; if multiple ORGs, user can choose to export them individually.
Penn ID	Brings back a single record

Additional Faculty Compensation Export Tips

- Export will only contain information relating to "Faculty" who meet the below criteria:
 - Active employee or on leave
 - Employment_Status in ('A','L','P')) and
 - This employee has a current faculty role
 - Faculty Class in ('TEN','PRE','CLE','ACN','RES','CLN','ADJ','VIS','VEP','PRF','WIS') or
 - A Health System Clinician: Job Class in ('110193','110191','399125') or
 - Part Time HSC: Job Class = 399125 and a job with Job Grade = 'CPU'
- For multi-select, if you select an item, and then change your mind and de-select it (click on arrow pointing towards selection choices), you will find the de-selected item at the bottom of the scrolling list, NOT in the original order.
- Export will include updates made through the Rapid Entry screen for future periods.
- Role and Distribution data is not included on export.
- Projected states will display but will not be included in current total salary calculation
- To view all columns, scroll to the right of the screen
- To sort the export result table, select column heading
- Terminated employee roles will not be included

Salary Increase Program Faculty Compensation Export Function (cont'd)

Columns/Data Included in Excel Download

PennWorks Excel Header Name	Details
Home School/Center	
Home/School Center name	
Home ORG	
Home ORG name	
Penn ID	
Last name	
First name	
Current total salary	Does not include projected states
New total salary	Does not include projected states
Current academic base	
New academic base	Blank if none has been entered for next year; populated if new base has been entered. Applies to standing faculty only.
% Academic base change	
Current faculty salary	
New faculty salary	Blank if none has been entered for next year; populated if new base has been entered. Applies to non-standing faculty.
% Faculty base change	
Current base salary supplement	
New base salary supplement	Blank if none has been entered for next year; populated if new base has been entered. Salary in excess of Academic Base or Faculty Salary that is guaranteed for a defined term.
% Base salary supplement change	
Current admin stipend	
New admin stipend	Blank if none has been entered for next year; populated if new base has been entered. Total salary paid for administrative appointments beyond regular teaching, research and service responsibilities.
% Admin stipend change	
Current staff salary	
New staff salary	Blank if none has been entered for next year; populated if new base has been entered. Salary that is normally paid for staff member duties, for those faculty who hold staff positions as their primary job
% Staff salary change	
Justification out of range	
Export date/time	Date/time in which export is run