

# Salary Increase Program Role Export Function

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## Salary Increase Program Role Export Function (cont'd)

### How to Use the Salary Increase Program Role Export Function

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

**Salary Increase Program :: Role Export**

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

A role-level report that can be filtered and exported to a spreadsheet.


Salary Increase Program*	equals	Select Value	▼
Salary Increase Eligible Person*	equals	Select Value	▼
Salary Increase Eligible Role*	equals	Select Value	▼
Role School/Center	in	00 GENERAL UNIVERSITY 02 SCHOOL OF ARTS AND SCIENCES 04 PROVOST INTERDISCIPLINARY PROG	Selected:
Role ORG	in	0001 GENERAL UNIVERSITY SURROGA 0007 GENERAL UNIVERSITY EB POOL 0030 LEARNING ALLNCE FOR HIGHER E	Selected:
Employee Group	in	Exempt Salaried Staff (Monthly Paid) Faculty (Monthly Paid) Non-exempt Hourly Staff (Weekly) Non-exempt Salaried Staff (Weekly)	Selected:
Faculty Class	in	ACN Academic Clinician (Associated Faculty) ADJ Adjunct Faculty (Associated Faculty)	Selected:

- ✓ **Decide** what your process will be and either:
  - 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
- OR**
- Use the available filters to 'slice and dice' your ORGS online prior to downloading small, more precise groups into Excel spreadsheets to pass along to the authorized modelers
- ✓ **Use** the available filters to more closely define the people in your download (see below for descriptions of filters and tips on using them)
  - Most filters allow you to make multiple selections.
  - The screen does not store a history of past filter criteria. You must reselect filter criteria.
  - To recreate a set of filters for future export, copy the criteria displayed below the export table.
- ✓ **Apply** a percent and/or amount increase across an entire group or a set of selected records if desired (e.g. 2%) in order to save time.

## Salary Increase Program Role Export Function (cont'd)

- If applying parameters, the screen will calculate and display new values (e.g. annual salary) in the results table. The new values only, not the calculations, will be exported to the Excel spreadsheet. If additional work is needed on the spreadsheet, you will need to enter new calculations.
- **NOTE: These processes are additive!**
  - If you enter '2%' and \$500, 2% will FIRST be calculated on the "Current annual salary" and added to it for the 'New annual salary' and THEN \$500 will be added onto that result to give the 'New(est) annual salary'.
  - If you decide that the \$500 is incorrect, you can delete that amount from the parameters and then re-execute the entire report and the new calculations will appear with only a 2% increase.
  - You CANNOT make changes to individual records in the executed report and have them re-calculate. ONLY the entire report can re-calculate for you.

- ✓ 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)

Listings: 1-39 of 39 [Export as xls](#) 

Role school center	Role school center name	Role org	Role org name	Employee group
02	SCHOOL OF ARTS AND SCIENCES	0101	ANTHROPOLOGY	Exempt Salaried Staff (Monthly Paid)
02	SCHOOL OF ARTS AND SCIENCES	0101	ANTHROPOLOGY	Exempt Salaried Staff (Monthly Paid)
02	SCHOOL OF ARTS AND SCIENCES	0101	ANTHROPOLOGY	Exempt Salaried Staff (Monthly Paid)

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

78	AUDIT COMPLIANCE & PRIVACY	7801	AUDIT AND PRIVACY
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Result page: 1

Filter Values:  
Salary Increase Program\* = 1  
SALINC Eligible Person\* = Both  
SALINC Eligible Role\* = Both  
Role School/Center = 78

- ✓ 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.

## Salary Increase Program Role Export Function (cont'd)

### Filtering Examples

1. **Salary Increase -eligible Standing Faculty in Annenberg School will be receiving an across the board increase of 4% except for 2 who will receive 6% increases.** The Role Export User will select the following:

- Program = Salary Increase FY2011
- Salary Increase Eligible Person = Yes
- Salary Increase Eligible Role = Yes
- Role School/Center = 36 Annenberg School
- Faculty Class – TEN
- Annual salary % to be Applied – 4
- Click 'Execute Report'
  - a. Filters used will be visible at the end of the results table for copying:

```
Filter Values:  
Salary Increase Program* = 1  
Salary Increase Eligible Person* = Yes  
Salary Increase Eligible Role* = Yes  
Role School/Center = 36  
Faculty Class = TEN  
Annual Salary % to be Applied (e.g. 2.00) = 4.00
```

- Click 'Export as xls'
  - User will have to manually enter on the Excel spreadsheet the 6% for the 2 faculty members (in the 'per of change ann sal' column) and do the calculations for 'New annual salary' and 'New pay period amt'
  - User will have to enter on the spreadsheet 'Justification type' and 'Justification comment' for the 2 with 6% increases
2. **Increases of \$.50 are made to the hourly rate of each person in the Union Bargaining Unit Local 835, Grounds/FRES for FY2011.** The Role Export User will select the following:

- Program = Local 835 (Bargaining Units 01-04) 06/01/2010
- Salary Increase Eligible Person = No
- Salary Increase Eligible Role = No
- Bargaining Unit = Local 835, Grounds/FRES
- Pay Period Amount \$ to be Applied = 0.50
- Click 'Execute Report'
  - a. Filters used will be visible at the end of the results table for copying:

```
Filter Values:  
Salary Increase Program* = 3  
Salary Increase Eligible Person* = No  
Salary Increase Eligible Role* = No  
Bargaining Unit = 02  
Pay Period Amount $ to be Applied = 0.500
```

- Click 'Export as xls'

## Salary Increase Program Role Export Function (cont'd)

3. **All Salary Increase -eligible exempt salaried monthly staff in Anthropology making under \$60,000 will be receiving a 3% increase.** The Role Export User will select the following:

- Program = Salary Increase FY2011
- Salary Increase Eligible Person = Yes
- Salary Increase Eligible Role = Yes
- Role School/Center = 02 SAS
- Role ORG = 0101 Anthropology
- Employee Group = Exempt Salaried Staff (Monthly Paid)
- Current Annual Salary ≤ \$60000
- Annual salary % to be Applied = 3%
- Click 'Execute Report'
  - a. Filters used will be visible at the end of the results table for copying:

```
Filter Values:  
Salary Increase Program* = 1  
Salary Increase Eligible Person* = Yes  
Salary Increase Eligible Role* = Yes  
Role School/Center = 02  
Role ORG = 0101  
Employee Group = 1  
Current Annual Salary (To) = 60000.000  
Annual Salary % to be Applied (e.g. 2.00) = 3.00
```

- Click 'Export as xls'

4. **All Regular Part-time Employees (Job Class 515555) in SAS are getting a Salary Increase increase of \$0.25 per hour.** The Role Export User will select the following:

- Program = Salary Increase FY2011
- Salary Increase Eligible Person = Yes
- Salary Increase Eligible Role = Yes
- Role School/Center = 02 SAS
- Employee Group = Non-exempt Hourly Staff (Weekly)
- Job Class = Regular Part-time Employees (# 515555)
- Pay Period Amount \$ to be Applied = \$0.25
- Click 'Execute Report'
  - o Filters used will be visible at the end of the results table for copying:

```
Filter Values:  
Salary Increase Program* = 1  
Salary Increase Eligible Person* = Yes  
Salary Increase Eligible Role* = Yes  
Role School/Center = 02  
Employee Group = 4  
Job Class = 515555  
Pay Period Amount $ to be Applied = 0.250
```

- Click 'Export as xls'

## Salary Increase Program Role Export Function (cont'd)

### What is Salary Increase Program Role Export?

Role Export allows 'Salary Increase Program Role Export' approved users to generate Excel spreadsheets to facilitate the modeling, routing, and approval of pay changes. 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 role information for groups of employees. NOTE: Users will only be able to export the ORG ranges specifically assigned to them.

### Key Features and Benefits of Salary Increase Program Role 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)
- Flexible filtering options for users to export a specific population, including employee group (monthly/weekly), job grade, job class, faculty class, eligibility status, current salary, or members of a bargaining unit
- Ability to apply the same percent or amount increase across an entire group or a set of selected records

### Filters/Parameters and Tips on Using Them

Filter Name	Description
Program	Salary Increase or Union
Salary Increase Eligible Person	Refer to the PennWorks Glossary item – 'Salary Increase Eligibility'.
Salary Increase Eligible Role	Refer to the PennWorks Glossary item – Salary Increase Eligibility.
Role School / Center	Displays only the school/centers based on the user's access.
Role ORG	Displays only the ORG(s) based on the user's access.
Employee Group	-- <b>Exempt Salaried Staff (monthly paid)</b> - The job class has an employee type of 1 and the job class does not contain a '2' in the 1 <sup>st</sup> position and the job class is not 140010. -- <b>Faculty (monthly paid)</b> - The job class has an employee type of 1 and the job class contains a '2' in the 1 <sup>st</sup> position or the job class is 140010. -- <b>Non-exempt Salaried Staff (weekly)</b> – The job class has an employee type of 2. -- <b>Non-exempt Hourly Staff (weekly)</b> - The job class has an employee type of 3.
Faculty Class	
Job Grade	
Bargaining Unit	
Job Class	
Employment	

## Salary Increase Program Role Export Function (cont'd)

Status	
Current Annual Salary (From)	
Current Annual Salary (To)	
Penn ID	
Annual Salary % to be Applied	
Pay Period Amount % to be Applied	
Pay Period Amount \$ to be Applied	
Annual Salary \$ to be Applied	

### Additional Role Export Tips

- 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 flags (Y/N) with dates of recent role changes.
- Export will not include any updates made through the Rapid Entry screen for future entry.
- Distribution data is not included on export.
- 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
- To view all records in user's ORG(s), select Salary Increase Eligible Person = ALL and Salary Increase Eligible Role= ALL.
- Search screen filters use AND logic, not OR logic.

### Columns/Data Included in Excel Download

Column name	Description
Role school center	The school or center that administers the role.
Role school center name	The school or center that administers the role.
Role org	The department that administers the role.
Role org name	The department that administers the role.
Employee group	The employee group to which the job class of the role belongs.
Employee type	e.g. Monthly, Weekly, Hourly
Salary Increase eligible person	Whether the employee is eligible for the Salary Increase process.
Salary Increase eligible role	Whether the role is eligible for the Salary Increase process.
Last name	

## Salary Increase Program Role Export Function (cont'd)

First name	
Penn id	The Penn ID of the employee holding the role.
Employment status	Remove terminated from dropdown e.g. Leave without pay
Job class	The job class associated with the role.
Role description	
Job grade	The grade of the job class associated with the role.
Appt hours	
Faculty class	The faculty class associated with the job class of the role.
Years in role	# years in position, based on job class entry date
Min of sal grade	The minimum salary for a particular grade. Example: grade 21 is \$18,445.
Under minimum	
Current annual salary	The minimum annual salary.
New annual salary	
Perc of change ann sal	
Amt of change ann sal	
Justification type	If Other – Explain is selected - Justification Comment will be required.
Justification comment	If 'Other' – Explain is selected - Justification Comment will be required.  Justification Comment is not available if other values are entered.
Current pay period amt	Applies to weekly and monthly salaried
New pay period amt	
Perc of change pay period amt	
Amt of change pay period amt	
Current hourly rate	Populated if employee type is hourly (Reg P/T and LIM)
New hourly rate	Populated if employee type is hourly (Reg P/T and LIM)
Current start date	
Current end date	
New end date	
Home org	
Home org name	
Role change flag	For promotion/demotion, reappointment, reclass, role org transfer, role update, salary increase/decrease, correct role.  If any of these actions happen in change log since the batch role change date – set flag to Y
Role change date	
Export date/time	Date/time in which export is run