2015-2016 Salary Review Process

Overview:

This example provides explanations and instructions for entering salary increases. Screenshots are displayed that demonstrate how to use the SAP Salary Review transaction.

Items of Note:

Page 3  Description of Terms (step 7)
Page 4  Example of entering a 3% merit increase (steps 8-10)
Page 5  Checking an employee’s cost distribution (step 11)
Page 6  Changing a previously entered increase (step 12)
Page 6  Example of an employee not eligible for merit based on date hired (step 13)
Page 6  Example of entering a $50/month merit increase and changing the number of months worked from 12 to 9 (steps 14-16)
Page 7  Example of entering a 6% merit increase (17-18)
Page 8  What to do if the allocation is exceeded (steps 19-24)
Page 10 Saving Salary Review entries (steps 25-27)
Page 12 Printing a copy of Salary Review entries (steps 28-34)

Before Starting the Transaction:

Know your Personnel Assignment number. Employees have been grouped under the managers (i.e. department heads) to whom they report. To access the Salary Review entry screen for your employees, you will enter your Personnel Assignment number when directed.

Reviews by Deans and Assistant/Associate Vice Presidents

See page 14.

Reviews and Approvals by Vice Presidents

See page 15.
1. Logon to the SAP system, preferably using SAP GUI.
2. At the SAP Easy Access screen enter transaction ZSALREV:

   ![SAP Easy Access](image)

3. Click the Enter button.

4. **Texas State Salary Review**

   ![Texas State Salary Review](image)
5. In the Primary Manager section, enter the Personnel Number of the manager responsible for entering salary review information.

   **Example:** 3078

   ![Warning icon]

   Do not change the Validity dates or Effective Date.

   ![Warning icon]

   The Finalize list on save box is reserved for the President and Vice Presidents to indicate final approval of the increases entered for the employees assigned to an individual manager. Once this box is checked, the system will not allow any additional entries/changes for these employees.

6. Click the Execute button.

7. **Texas State Salary Review**

   ![Texas State Salary Review interface]

   **Notes:**

   - **Description of Terms**
     - **Allocated Fund** – The specific funding source for employee salaries.
     - **Method Funds** are those accounts funded by appropriations, tuition, or designated tuition.
2015-2016 Salary Review Process – Procedure Example and Instructions

- Other funds displayed are income generating or fee based and exclude grants and gift funds.
  - **Original allocated amount** – Displays the amount allocated to the manager for Staff merit increases. This amount will fund increases for employees whose cost distribution reflects full or partial funding from the identified fund(s).
  - **Amount remaining for distribution** – The amount will decrease as increases are entered.
  - **Name** column – Employees are listed alphabetically. Although six lines are listed for each employee (allowing for six types of increase), one line will be used for Staff in the 2015-2016 salary review process.
  - **TxStID** column – Lists the Person ID number of each employee.
  - **Pernr** column – Lists the Personnel Assignment number of each employee.
  - **Position** column – Abbreviations of position titles are listed.
  - **Reason** column – Lists the types of increases available.
  - **PctIncr** column – Used to enter increases by percentage amount (i.e., 2.00 %).
  - **DollarIncr** column – Used to enter increases by dollar amount per month (i.e., $25.50).
  - **NumMoWork** column – 12 months is displayed for each employee. **Modify this number if necessary** to correctly display the number of months to be budgeted for an employee. The number in this column is used to calculate the total cost of any increase entered in the PctIncr or DollarIncr columns.
  - **CurrPayMonth** column – Displays the employee’s monthly salary as of June 1, 2015 before any increases are added. It does not include State Longevity and Hazardous Duty Pay.
  - **ProposedMonth** column – Displays the employee’s revised monthly salary as increases are given.
  - **Update list** button (upper left of screen) – Clicking this button after entering one or more increases updates the **Amount remaining for distribution**.

8. Select one Staff employee and enter a merit increase on the 01 Staff Merit line. (01 Staff Merit is displayed in the Reason column.)

   **Example:** Arnold Anderson is a 12-month employee and is to receive a 3% merit increase. On Arnold’s 01 Staff Merit line find the 0.00 in the PctIncr column. Change it to 3.00.

9. Click the **Update list** button (upper left of screen) in the upper left part of the screen.

   **Notes:**
   a. Click this button after entering each employee’s increase.
   b. If several employees’ increases are entered before this button is clicked, and the sum of the increases exceeds one or more of the Amount remaining for distribution figures, it may be difficult to determine which employee’s increase caused the amounts(s) to be exceeded.
10. Texas State Salary Review

Notes:  

a. Percentage increases are calculated using the salary displayed in the CurrPayMonth column. Arnold’s monthly salary before the merit increase was $3,622.49.

b. The dollar value of the 3% merit increase is displayed as $108.67 per month ($3,622.49 X 3% = $108.67).

c. A $108.67 per month merit increase for 12 months costs $1,304.04 per year.

  o Since Arnold’s cost distribution reflects 100% Method funding, the Amount remaining for distribution has been reduced by $1,304.04.

  o Had the cost distribution been less than 100% Method funded, the Amount remaining for distribution would have been reduced by a proportionate amount.

  For example, if the funding was split 75% Method and 25% 3002001006, the Amount remaining for distribution for each fund would be reduced as follows: Method by $978.03 ($1,304.04 X 75%) and 3002001006 by $326.01 ($1,304 X 25%).

11. To check the cost distribution for an employee, double click the employee’s name.

Example: Double clicking Arnold Anderson’s name provides the following display, which indicates that 100% of his 3% ($108.67/month) merit increase will be charged to the Fund listed.

Note: Click on the Back button (        ) to return to the salary review screen.
12. Making changes to increases after the Update list button (Update list) has been clicked:
   a. Once a percentage increase has been entered and the Update list button has been clicked, the dollar value of the percentage increase is displayed in the DollarIncr column. Be aware that the system will not allow you to change and update the figure in the DollarIncr column.
      o To change the amount of the percentage increase, go to the PctIncr column, change the percentage, and click the Update list button. The amount in the DollarIncr column will change automatically.
      o To change the increase from a percentage-based increase to a dollar-based increase, you must first change the amount in the PctIncr column to 0.00 and click the Update list button. Then you can enter an amount in the DollarIncr column and click the Update list button.
   b. To increase or decrease a dollar increase entered in the DollarIncr column, enter the new dollar amount and click the Update list button.
   c. To change a dollar increase entered in the DollarIncr column to a percentage increase, enter the percentage in the PctIncr column and click the Update list button.

13. Employees hired after September 2, 2014, are not eligible for merit increases. While these employees will be displayed, no increase can be entered in either the PctIncr column or the DollarIncr column.
    Example: Bonnie Ashton was hired on September 3, 2014. She is not eligible for a merit increase.

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<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Position</th>
<th>Reason</th>
<th>PctIncr</th>
<th>DollarIncr</th>
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</table>

Notes: In the Reason column for Ashton, the 01 Staff Merit option is not displayed.

14. Select the next Staff employee to receive a merit increase and enter the increase on the 01 Staff Merit line.
    Example: John Berry is a 9-month employee and is to receive a $50 per month merit increase. On John’s 01 Staff Merit line find the 0.00 in the DollarIncr column. Change it to 50.00. In the NumMoWork column change the 12 to 9.

15. Click the Update list button (Update list).
16. Texas State Salary Review

Note:

a. John’s cost distribution reflects fund 3002001006.

b. A $50 per month increase for 9 months costs $450 per year.

c. From an Original allocated amount of $1,170, the Amount remaining for distribution from this fund has been reduced to $720 ($1,170 – 450 = $720).

17. Select the next Staff employee to receive a merit increase and enter the increase on the 01 Staff Merit line.

   Example: Jake Compton is a 12-month employee and is to receive a 6% merit increase. On Jake’s 01 Staff Merit line find the 0.00 in the PctIncr column. Change it to 6.00.

18. Click the Update list button (Update list).
19. Texas State Salary Review

**Notes:**

a. The dollar value of a 6% increase would be $273.35 per month ($4555.86 X 6%).

b. A $273.35 per month increase for 12 months would cost $3,280.20 per year ($273.35 X 12).

c. Jake’s cost distribution is attached to fund 2000011006, which is considered Method. The *Amount remaining for distribution* from Method Funds is $2,802.96.

d. Since the 12-month cost of Jake’s 6% merit increase ($3,280.20) exceeds the *Amount remaining for distribution* ($2,802.96), the entry will not be accepted for update. An Information box is displayed, indicating that the Method allocation has been exceeded.

20. Click the Continue (Enter) button on the information box.
21. Texas State Salary Review

Texas State Salary Review

Manager: Ryan, Betty

Amount remaining for distribution: 2,802.96 729.00 1,756.44

Notes:

a. An “Allocation over expended” (_allocation over expended_) error message is displayed at the bottom left of the screen.

b. With an Amount remaining for distribution of $2,802.96, either Jake’s increase must be reduced or one or more increases entered for other Method-funded employees must be reduced.

22. Reduce Jake’s increase to 5%.

23. Click the Update list button (Update list).
24. Texas State Salary Review

Notes:

a. Jake’s increase has been accepted and the Amount remaining for distribution reduced to $69.48.

b. Additional entries or changes to Method-funded employees may be made in order to allocate the remaining $69.48.

25. Continue entering increases. When all increases and changes have been entered, click the Save button ( ).

⚠️ Remember to click the Save button ( ) prior to leaving the transaction or all entries made since the last Save action will be lost.
26. Texas State Salary Review

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</table>

27. A “Records saved” message (✅ Records saved) appears at the bottom of the screen and the salary review transaction is complete.

Note: Further entries and changes may be made after saving the transaction.

⚠️ Once again, remember to click the Save button (✅) prior to leaving the transaction or all entries made since the last Save action will be lost.

The transaction is complete.

If you desire to print a copy of the salary review entries, follow the instructions on the next two pages.
28. To print a copy of the salary review entries:
   Click **System** in the upper left corner of the screen.

29. A dropdown box of options will appear:

![Dropdown box of options](image1)

30. Place your cursor on **List** and an additional box of options will appear:

![Additional options](image2)

31. Click **Print Ctrl+P**
32. A Print Screen List box will appear:

![Print Screen List](image)

33. Verify/enter the name of the Output Device (i.e., printer).

34. Click the Continue (Enter) button (☑) on the information box.

**Printing is complete.**
Reviews by Deans and Assistant/Associate Vice Presidents

1. You will need the Personnel Assignment number of each of your direct reports. To review the entries made by your managers for their employees, use the transaction described on pages 2-11 above.

To display the entries made by a particular manager, enter that manager’s Personnel Assignment number on the initial Texas State Salary Review:

![Texas State Salary Review]

2. You may change the Staff Merit amounts entered by each of your managers. Remember, however, that any changes you enter for a Method-funded employee will be limited by the remaining merit pool allocation for that group of employees. The system will not allow you to overspend the original allocated amount for that group.

3. If you change any of the entries made by a manager, remember to click the Update List button (Update list) to implement your changes. Then save your entries by clicking the Save button (Save) before you close the transaction.

4. Notify your Vice President when you have completed reviews of the entries made by your direct reports.
Reviews and Approvals by Vice Presidents

1. You will need the Personnel Assignment number of each manager in your division who made Salary Review entries. To review the entries made by your managers for their employees, use the transaction described on pages 2-11 above.

To display the entries made by a particular manager, enter that manager’s Personnel Assignment number on the initial Texas State Salary Review:

2. You may change the Staff Merit amounts entered by each of your managers. Remember, however, that any changes you enter for a Method-funded employee will be limited by the remaining merit pool allocation for that group of employees. The system will not allow you to overspend the original allocated amount for that group.

3. If you change any of the entries made by a manager, remember to click the Update List button (Update list) to implement your changes. Then save your entries by clicking the Save button (Save) before you close the transaction.

4. Final Approval of a Manager’s List. To indicate your final approval of a manager’s list and prevent any further changes/entries for the employees assigned to the manager, use the Back button (Back) to return to the initial Texas State Salary Review screen. Verify that the manager’s Personnel Number is displayed in the Primary Manager section:
5. Click on the Finalize list on save box.

6. A checkmark will appear, confirming that this manager’s list has been locked:

7. Click the Execute button.

8. Click the Save button.

9. Enter another manager’s Personnel Number to initiate review of entries or close the transaction.

The review and approval process is complete.