





Annual Salary Review Quick Reference for the Administrator Role

-SRS Annual Salary Review-

Select the Department for Review:

- From the SAP menu open the folder:
Role Z_HRASR_DEPARTMENT. (Administrator Role)
- Select: **ZASR – Annual Salary Review Overview.**
- Click the **Matchcode** button  ( on a MAC) to select **Fiscal Year/Cycle/Step.** The year changes each cycle year.
- Select either the **SRT** (technical) or **SRA** (administrative) review.

Note: If you know the **SAP Org. Unit** number you may enter it directly in the **Org. Unit** field.

- Click the **Matchcode** button  ( on a MAC) to search for a **SAP Org. Unit.**

*Tip: See the **Matchcode Search Quick Card** if you do not know the specific number and need assistance.*

- Click the **List ASR** button .
- The **Status** field is right next to department name.

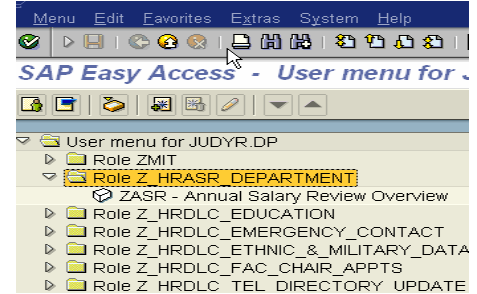
Note: You are looking for the **Released** status.

- New** Created by Compensation Office.
- Released** The Approver completed initial review and *saved & released* the ASR data for the DLC Administrator.
- Submitted** The Administrator has completed their review and *saved & submitted* the data in SAP.
- Approved** The Approver has completed their final review of the ASR data and *approved* it.
- Activated** Compensation Office activated the ASR data in SAP and it can be seen by HR and Payroll as soon as it is activated.

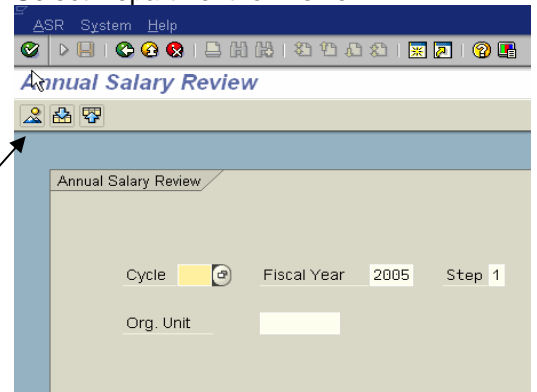
- Double click on the **Department** field to see the ASR amounts at the employee level.

Note: The window lists the department's employees who are eligible for the ASR. **To sort or change the layout, refer to the Quick Card on Changing/Saving Layout.**

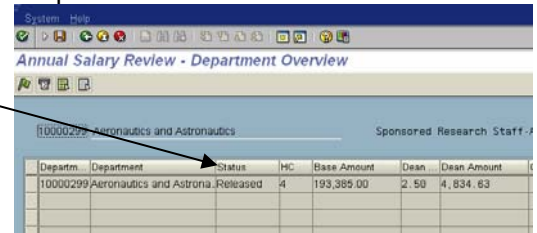
SAP User menu



Select Department for Review



Department Overview screen




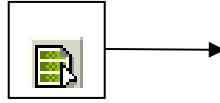
Employee Overview screen



New Column called Saved has been added in response to departments concerns about not knowing whose record they had changed prior to submitting. The column has a yellow triangle to indicate an employee's record has not been updated or saved. When you make a change to the record and save it the yellow triangle becomes a green circle. This helps departments to know where they left off the last time they worked on the review.

Making Adjustments: Employee Overview screen



- Change the **Adjust dollar Amount** for an employee.
- Click the **Enter** key.
- Click the **Save**  button.



Employee Overview screen

| Exception | PersNo | Last name | First name | Position Title | % Adj | Adj. Base | Adj Amt | Saved Flag | New Total |
|-----------|--------|-----------|--------------|-----------------------|-------|-----------|-------------------|-----------------|-------------------|
| 000 | 3291 | Sarah | Hughes0006 | Sponsored Research Ad | 2.50 | 44,750.00 | 1,118.75 | ▲ | 45,868.75 |
| 000 | 3268 | Anthony | DeGeorge0007 | Sponsored Research Ad | 2.50 | 37,500.00 | 937.50 | ▲ | 38,437.50 |
| 000 | 3242 | James | Nash0007 | Sponsored Research Ad | 2.50 | 64,885.00 | 1,622.13 | ▲ | 66,507.13 |
| 000 | 3216 | Wanda | Adams0007 | Sponsored Research Ad | 2.50 | 48,250.00 | 1,156.25 | ▲ | 49,406.25 |
| | | | | | | | 193,385.00 | 4,834.63 | 198,219.63 |

Note: SAP will recalculate the **New Total**.

- Click the **Select All** button  to select all employee records.
- Click the **Save**  button.

Employee Detail screen



| Department | Appointment | Base | Increase | New Total |
|---------------------------|---------------------------|-----------|----------|-----------|
| Aeronautics and Astronaut | Sponsored Research Admini | 64,885.00 | 1,622.13 | 66,507.13 |

| Adj. | Adjustment Type | Amount | Pct | Eff. Date | Valid to | Comment |
|------|------------------------|----------|------|------------|------------|---------|
| ASRI | Annual Salary Increase | 1,622.13 | 2.50 | 01/01/2005 | 12/31/9999 | |

Making Adjustments: Employee Detail screen

- Double click on **the employee name** field to view the **Employee Detail** screen.

To Remove an employee from the list: Click the **Matchcode** button in the **Comment** Field.



- Double click on **your comment choice** from the **Hit List**.
- Click the **Enter** key.
- Click the **Save**  button.
- Click the **Back**  button to return. *If you are ready to return to the Employee Overview screen.*


Comments Hit List

| Comment | Description |
|---------|---|
| 01 | Remove from ASR - Terminating (D) |
| 02 | Remove from ASR - Retiring (D) |
| 03 | Remove from ASR - Changing Department (D) |
| 04 | Remove from ASR - Changing Payroll Category (D) |
| 05 | Remove from ASR - Layoff (D) |
| 06 | Remove from ASR - Negotiated Salary (D) |
| 07 | Review no Increase - High in Range (*) |
| 08 | Review no Increase - Below Expectations (*) |
| 09 | Deferred Merit - Performance (H) |
| 10 | Unsatisfactory Performance (*) |
| 11 | Exceptional Performance (*) |
| 12 | Deferred Merit - Other (H) |
| 13 | Review no Increase - Lump Sum (*) |
| 14 | Review no Increase - Other (*) |
| 15 | Other Academic Only - Reappoint with Increase (15) |
| 16 | Other Academic Only - Reappoint without Increase (16) |
| 17 | Other Academic Only - No Changes (D) |
| 18 | Other Academic Only - Review Increase Only (18) |

Note: That the **Adjustment Amount** field for that employee is **0.00**. *The ASR Pool will decrease; the money can not be re-allocated.*

To add a Lump Sum:

- Click the **Insert Line**  button on the **Employee Detail** screen.
- Click the **Enter**  button on the **Adjustment Type Hit List**.
- Enter the correct **amount** in the **Lump Sum Line**.

Insert & Delete Line buttons 



Adjustment Type Hit List

Choose Adjustment Type

LSUM - Lump Sum



[Other options]


Note: *The Lump Sum is a one time increase and does not affect the New Total for the employee.*

- Click the **Save**  button.
- Click the **Back**  button to return. *If you are ready to return to the Employee Overview screen.*

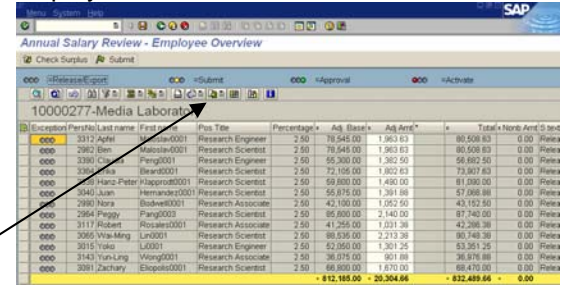
What If Scenario in Excel: provides an option to use %

Note: You can download the employee data to an Excel spreadsheet (before making adjustments in SAP). The final dollar increase amounts must be entered & saved & submitted in SAP.

- From the **Employee Overview** screen click the **Export** .
- Select the **Local File** option.
- Select **Spreadsheet**.
- Click **Enter**  button.
- Enter a **File name**. save as **.xls**
- Click the **Generate** button.
- Go to the **Local File** and open the **Spreadsheet**.

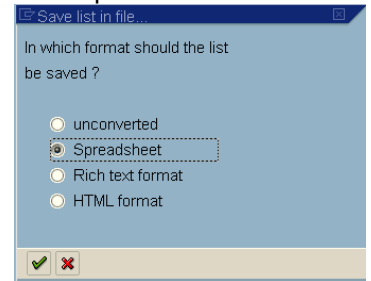
Export Button


Employee Overview screen



| Personnel No. | Last name | Position Title | Percentage | Adj. Base | Adj. Amt | Total |
|---------------|------------|--------------------|------------|-------------------|------------------|-------------------|
| 000 3312 | Adri | Research Engineer | 2.50 | 79,545.00 | 1,963.83 | 80,508.83 |
| 000 2962 | Ben | Research Scientist | 2.50 | 79,545.00 | 1,963.83 | 80,508.83 |
| 000 2306 | Chen | Research Engineer | 2.50 | 95,260.00 | 1,362.50 | 96,622.50 |
| 000 2306 | Chen | Research Scientist | 2.50 | 75,155.00 | 1,802.83 | 76,957.83 |
| 000 2880 | Hana-Peter | Research Scientist | 2.50 | 59,890.00 | 1,436.00 | 61,326.00 |
| 000 3043 | Juan | Research Scientist | 2.50 | 55,975.00 | 1,301.98 | 57,276.98 |
| 000 2880 | Nara | Research Associate | 2.50 | 43,150.00 | 1,052.90 | 44,202.90 |
| 000 2854 | Peggy | Research Scientist | 2.50 | 85,800.00 | 2,140.00 | 87,940.00 |
| 000 2117 | Robert | Research Associate | 2.50 | 41,255.00 | 1,031.38 | 42,286.38 |
| 000 2090 | Wan-Ming | Research Scientist | 2.50 | 89,535.00 | 2,213.38 | 91,748.38 |
| 000 2015 | Yuko | Research Engineer | 2.50 | 52,350.00 | 1,301.25 | 53,651.25 |
| 000 3143 | Yun-Ling | Research Associate | 2.50 | 36,075.00 | 901.80 | 36,976.80 |
| 000 3001 | Zachary | Research Scientist | 2.50 | 68,895.00 | 1,675.00 | 70,570.00 |
| | | | | 812,185.00 | 20,304.86 | 832,489.86 |

Save Spreadsheet



Save list in file...

In which format should the list be saved?

unconverted
 Spreadsheet
 Rich text format
 HTML format

Excel Spreadsheet Formatting:

- Delete the 1st & 2nd blank columns.
- Insert 3 columns to the left of column D.
- Enter the following column headings in bold text.

D: What if % E: What if Adj Amt F: What if Total

- Resize the columns.
- Note:** To re-size columns click on the box in upper right corner (above the #1) and select spreadsheet. Then place your cursor between column A & B and double click.
- Enter the following formulas in columns E & F to calculate the **What if Adjustment Amount & What if Total:**

Column E: $=D\#/100*H\#$ Column F: $=E\#+H\#$ (#=row number)

Note: Column E should show zeros and column F should show the Adjustment Base from column H.

- Enter a formula for the **Total What if Adjustment Amount in column E:** (On the same row as the totals for H, I, & L)

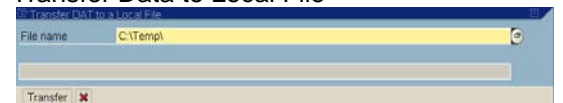
How To: Click in the cell in column F in the total row. Choose **Insert > Function**. In the pop-up window choose **SUM**. In the next pop-up window, check that **E7: E#** defaults in the Number 1 field, if not fix the data. Click **OK**. **Can use Auto Sum**

- Enter a formula to calculate the **Remaining Allocation Amount in column E** below the **Total What if Adjustment Amount**.

Total Adjustment Amt – Total What if Adjustment Amt = Remaining Allocation Amt

$$=I\#-E\#$$

Transfer Data to Local File

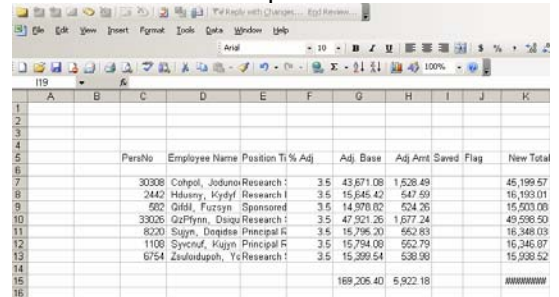


Transfer OAT to a Local File

File name: C:\Temp\

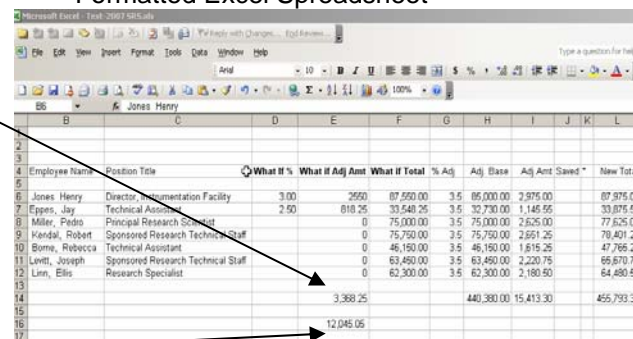
Transfer

Unformatted Excel Spreadsheet



| PerNo | Employee Name | Position Title | Ti % | Adj | Adj. Base | Adj. Amt | Saved | Flag | New Total |
|-------|----------------|----------------|------|-----|------------|----------|-------|------|------------|
| 30308 | Cuhpet, Joduno | Research ? | 3.5 | | 43,671.08 | 1,528.49 | | | 45,199.57 |
| 2442 | Hibunny, Kydyf | Research I | 3.5 | | 15,645.42 | 647.59 | | | 16,293.01 |
| 582 | Giddi, Fuzryn | Sponsored | 3.5 | | 14,978.02 | 524.26 | | | 15,502.28 |
| 33026 | OzPhynn, Daigu | Research ? | 3.5 | | 47,521.26 | 1,677.24 | | | 49,198.50 |
| 6200 | Suygn, Doghwa | Principal R | 3.5 | | 15,795.20 | 652.83 | | | 16,448.03 |
| 1100 | Syemuf, Klygn | Principal R | 3.5 | | 15,754.00 | 552.79 | | | 16,306.79 |
| 6754 | Zaufundaph, Yc | Research ? | 3.5 | | 15,892.54 | 538.98 | | | 16,431.52 |
| | | | | | 169,205.40 | 5,922.18 | | | 175,127.58 |



Formatted Excel Spreadsheet





| Employee Name | Position Title | What if % | What if Adj Amt | What if Total | % Adj | Adj. Base | Adj. Amt | Saved | New Total |
|----------------|------------------------------------|-----------|-----------------|------------------|-------|-------------------|------------------|-------|-------------------|
| Jones, Henry | Director, Documentation Facility | 3.00 | 2550 | 87,550.00 | 3.5 | 65,000.00 | 2,975.00 | | 87,975.00 |
| Egges, Jay | Technical Associate | 2.50 | 818.25 | 33,546.25 | 3.5 | 32,730.00 | 1,145.55 | | 33,875.55 |
| Miller, Pedro | Principal Research Scientist | | | 75,000.00 | 3.5 | 75,000.00 | 2,625.00 | | 77,625.00 |
| Kendal, Robert | Sponsored Research Technical Staff | | | 75,750.00 | 3.5 | 75,750.00 | 2,651.25 | | 78,401.25 |
| Borne, Rebecca | Technical Assistant | | | 46,150.00 | 3.5 | 46,150.00 | 1,615.25 | | 47,765.25 |
| Levitt, Joseph | Sponsored Research Technical Staff | | | 63,450.00 | 3.5 | 63,450.00 | 2,220.75 | | 65,670.75 |
| Lin, Ellis | Research Specialist | | | 62,300.00 | 3.5 | 62,300.00 | 2,180.50 | | 64,480.50 |
| | | | | 3,388.25 | | 440,380.00 | 15,413.30 | | 455,793.30 |
| | | | | 12,045.05 | | | | | 12,045.05 |

Submitting the ASR Data:


Note: After the Adjustment Amount changes have been completed and saved in SAP, the ASR data needs to be submitted back to the Assistant Deans for review and approval.

- From the SAP menu open the folder:
Role_Z_HRASR_DEPARTMENT. (Administrator Role)
- Select: **ZASR – Annual Salary Review Overview.**
- Click the **Matchcode** button  ( on a MAC) to select **Fiscal Year/Cycle/Step.**



Note: You need to submit both the SRA & the SRT reviews.

- Click the **Matchcode** button  ( on a MAC) to search for a **SAP Org. Unit.**


*Tip: See the **Matchcode Search Quick Card** if you do not know the specific number and need assistance.*

- Click the **List ASR** button .
- Double click on the **Department** that you want to **Submit.**

Note: Once the data is submitted changes to the amounts can only be made by the Assistant Deans.

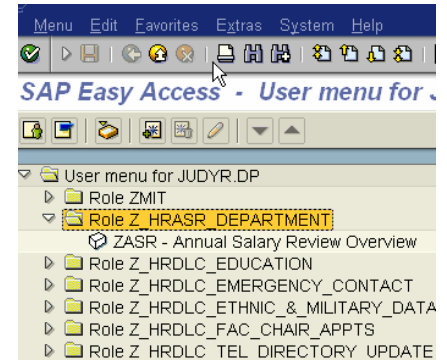
- Click the **Select All** button  to select all employee records.
- Click the **Submit**  **Submit** button.

Note: the Exception column for each employee displays the “yellow light”. You can submit one employee at a time.

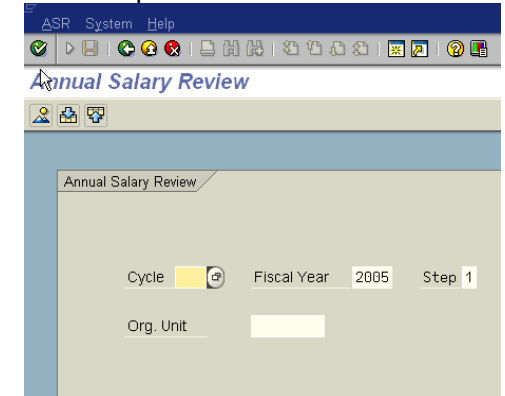
- Click **Back**  button. You return to the Departmental Overview screen.

Note: That the **Status** has changed to **Submitted** on the Department Overview screen.

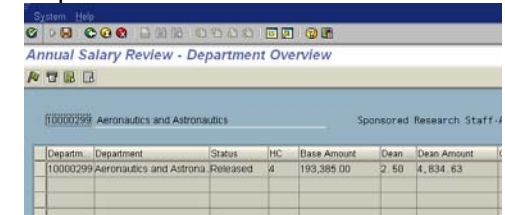
SAP User menu



Select Department



Department Overview screen



Employee Overview screen



Department Overview screen

