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SR81873 Requirements
2007 Web Merit Enhancements, Phase I

Objective:

To implement mission-critical enhancements to the Web Merit online application, so that campuses may utilize the application to process October 2007 salary increases successfully.

Project Type:

This is a series of enhancements to an existing application.

Requested by:

HR&B HR and Compensation Policy

Analyst:

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Due Date(s):

The requested modifications are Date Mandated.

It is requested that the changes be made available to campuses by July 1 so that they have adequate time to test and install the release prior to processing of October 2007 merit cycles.

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Background

PPS release 1428, dated August 9, 2002, implemented the initial Web Merit system, a web-based online application to automate the processing of merit increases. A subsequent release the following year, R1513, added new functionality to process across-the-board (ATB) cycles.

In 2005, Santa Barbara became the first campus to use the Web Merit system to process October merit increases for policy-covered (unit '99') employees. Other campuses, in particular UCLA and UC Riverside, tested the application extensively or ran the application in parallel with the existing batch merit process (PPP670).

After the October 2005 merit cycles were complete, HR&B ISS solicited feedback from those campuses which had implemented or tested the application, with the goal of identifying critical and high-impact modifications which would allow more locations to use the application. To address those concerns, the following releases were implemented in 2006:

- R1713, dated 07/12/06, 2006 Web Merit Enhancements
- R1722, dated 08/28/06, Web Merit Enhancements 2006 Phase II
- R1726, dated 09/13/06, Web Merit Follow-up
- R1728, dated 09/19/06, Web Merit Fix

Following the October 2006 merit cycles, HR&B ISS again solicited feedback from the campuses regarding further enhancements that would make the application even more beneficial. The 2007 enhancements will be completed in phases for efficiency.

Current Process

Merit Cycle Administration

Cycle ID

On the Add New Merit Cycle page, there is a field titled Cycle ID. Aside from validation to prevent duplicate cycle IDs, there are no value edits on this field.

The Download Roster function incorporates the cycle ID into the filename of the download file. Filenames containing special characters are not valid. Some browsers (e.g. Internet Explorer version 7) automatically substitute dashes or underscores for special characters in the filename. In browsers where this substitution does not occur (e.g., Internet Explorer version 6), the result is a download file of unknown filetype named "ControllerServlet," which makes the download and import process confusing and cumbersome.

Roster Page

Link from Employee Name to Employee Detail Page

The Employee Name link on all roster pages (step-based, open range, ATB and merit) opens the Employee Detail page in a separate browser window. When the Employee Detail page for a particular employee is opened and then closed, the Employee Name link for that employee will not appear "visited" (red) until the user clicks on the browser refresh button, saves changes or navigates to another page and back.

After the Employee Detail page for a particular employee has been opened, all other employees in the same position (row) on other pages of the roster and on other rosters erroneously appear

visited (red). This is confusing for users, as they cannot be sure which Employee Detail pages they have viewed.

This issue applies to Internet Explorer version 6 but not Internet Explorer version 7.

Column Order on Range-based Merit Roster and Range-based ATB Roster

The range-based merit roster and range-based ATB roster contain entry fields titled “Annual Increase” and “Pct Incr.,” with “Annual Increase” first. The current order of the fields makes data entry more cumbersome, as most merit increases are given as a percentage rather than a dollar amount.

Current and New Salary Headings

Currently all rosters contain fields titled “Current Ann. Salary/Rate” and “New Annual Salary/Rate.” The campuses feel that these headings are confusing when an employee has only an hourly rate.

Performance Evaluation Date

The Merit Roster Cycle Definition includes an optional field called “Oldest Performance Review Date.” If a value is present in this field at the time of the EDB extract for a given cycle, the EDB extract is screened accordingly. The range-based and step-based merit roster pages have an entry field titled “Eval. Date.” Currently, the Eval. Date field is not validated with regard to the Oldest Performance Review Date for the cycle. This is not consistent with the policy stating that every employee should have an annual performance review.

Currently one of the standard definitions on the Performance Evaluation Table is “XNo Performance Evaluation Conducted.” Associated codes may vary, as campuses can set up their own local codes. “Eval Date” is currently a required field on merit rosters, even if no performance evaluation was conducted.

Roster page links and buttons

Currently the roster pages contain links and buttons at the bottom of the page, for example “Back to Dept. List,” “Save Changes,” “Reset,” “Cost Summary,” “Download Roster,” “Next” and “Prev.” This requires the user to scroll to the bottom of the page to navigate or execute a function such as “Download Roster” or “Cost Summary.”

Download Roster Function

All types of roster pages have a “Download Roster” button. The Download Roster function gives the user the option of opening the semicolon-delimited text file in Notepad or saving it. The download file currently includes all employees, even those who have been deleted from the roster.

The Employee Detail page contains a freeform Comments field that can hold up to 200 characters. Comments are required when an employee is deleted from a roster. Comments are not currently included in the download file available from the roster page.

The download file for the range-based merit roster and range-based ATB roster contains fields titled “Annual Increase” and “Pct Incr.,” with “Annual Increase” first.

The Download Roster file currently includes the employee’s title code but not the title description. Campuses have requested that the title description be added.

Employee Detail Page

Percent Time

The Employee Detail page contains a field on the distribution record labeled “Pct.” This field is carried out to two digits after the decimal point. However, in the Employee Database (EDB), the distribution percent is carried out to four digits after the decimal.

Next Merit Review Code

The Next Merit Review Code displayed on the Employee Detail page currently contains an unnecessary decimal point.

Merit Increase dollar amount

On the Employee Detail page for open range rosters, the dollar amount of the employee’s increase is displayed in the “Incr. Amount” field. If the employee’s increase has not yet been entered and saved on the roster, the “Incr. Amount” field displays a negative number (the employee’s “Old Annual Salary” preceded by a negative sign). Users find this confusing, and would prefer to see a blank Increase Amount until an increase has been entered and saved on the roster.

Comments text box

The Employee Detail page has buttons titled “Save Comments” and “Delete from Roster.” Currently the user is unable to enter and save comments without inadvertently deleting the employee. If the user enters comments in the text box, clicks the “Save Comments” button, clicks the “Close” button to return to the roster page, and then refreshes the roster page, he/she will see that the employee has been deleted.

Once an employee has been deleted from the roster, the “Restore to Roster” button appears on the Employee Detail page. At this point, the Comments text box is not available. Campus users would like to be able to enter comments when restoring a deleted employee back to the roster. Currently, comments are deleted when an employee is restored to the roster.

There is currently no way to edit existing comments for an employee.

Instructions and Messages on Delete and Restore Functions

When the Employee Detail page is displayed, there are no instructions indicating that, in order to delete an employee from the roster, the user must enter comments into the text box and then click the Delete from Roster button. Similarly, when the Employee Detail page opens for a deleted employee, no restore instructions are displayed.

When the user executes the “Delete from Roster” function, the following message displays: “Employee record marked as deleted. Click 'Save Changes' or refresh the roster page to display the row as deleted.” This is confusing because there is no “Save Changes” button on the Employee Detail page.

When the user executes the “Restore to Roster” function, the following message displays: “Employee record has been undeleted. Click 'Save Changes' or refresh the roster page to display the row as restored.” This is confusing because there is no “Save Changes” button on the Employee Detail page.

Button Behavior on Delete and Restore Functions

When the user clicks the “Delete from Roster” button and then confirms deletion on the pop-up, he/she is returned to the Employee Detail screen and the “Save Comments,” “Delete from Roster” and “Close” buttons are displayed. It is confusing to see the “Delete from Roster” button, since the employee was just deleted. If the user stays on the Employee Detail screen and clicks the “Delete From Roster” button a second time, then confirms deletion on the pop-up, the “Restore to Roster” and “Close” buttons are displayed. This seems like a delayed response.

When the user clicks the “Restore to Roster” button, the buttons displayed are still “Restore to Roster” and “Close.” It is confusing to see the “Restore to Roster” button, since the employee was just restored. If the user stays on the Employee Detail screen and clicks the “Restore to Roster” button a second time, the comments text box reappears and the “Save Comments,” “Delete from Roster” and “Close” buttons are now displayed. This seems like a delayed response.

Roster Department Selection List

Currently the list of department codes in the Department No. column on the Roster Department Selection List is not sorted in order. The order of the department codes on a given list changes randomly as the user navigates around the departmental hierarchy.

Audit Past Cycles

The Audit Past Cycles section of the Web Merit application has pages analogous to those under Merit Review/Input. The Audit Past Data page corresponds to the roster page.

Link from Employee Name to Employee Detail Page

When Web Merit is viewed using Internet Explorer version 6, the Employee Name links on the Audit Past Data page often erroneously appear visited (red) as is the case on the roster page.

Column Order on Range-based Merit and Range-based ATB Audit Past Data Page

Audit Past Data pages for range-based merit rosters and range-based ATB rosters contain display fields titled “Annual Increase” and “Pct Incr.,” with “Annual Increase” first.

Current and New Salary Headings on Audit Past Data page

Audit Past Data pages for all rosters contain fields titled “Current Ann. Salary/Rate” and “New Annual Salary/Rate.” The campuses feel that these headings are confusing when an employee has only an hourly rate.

Audit Past Data page links and buttons

All Audit Past Data pages contain links and buttons at the bottom of the page, for example “Back to Dept. List,” “Cost Summary,” “Download Roster,” “Next” and “Prev.” This requires the user to scroll to the bottom of the page to navigate or execute a function such as “Download Roster” or “Cost Summary.”

Audit Past Data Download Roster Function

The Audit Past Data page has a “Download Roster” button. The Download Roster function gives the user the option of opening the semicolon-delimited text file in Notepad or saving it. The download file currently includes all employees, even those who have been deleted from the roster.

Comments are not currently included in the download file available from the Audit Past Data page.

The download file for the Audit Past Data range-based merit roster and range-based ATB roster contains fields titled “Annual Increase” and “Pct Incr.,” with “Annual Increase” first.

The Audit Past Data roster download file currently includes the employee’s title code but not the title description. Campuses have requested that the title description be added.

Proposed Process

- 1) The Merit Cycle Administration function should be modified as follows:
 - a) The following characters should not be allowed in the Cycle ID field on the Add New Merit Cycle page:
/ * \ : “ < > ? |

- 2) The Web Merit Roster Page should be modified as follows:
 - a) After the Employee Detail page for a particular employee is opened, only that employee name link should appear “visited” (red) on the roster. Employee name links on other pages of the same roster and on other rosters should remain blue until they themselves have been visited. (This change applies to all types of rosters when viewed in Internet Explorer version 6.)
 - b) On the range-based merit roster and range-based ATB roster, the Pct Incr. field should precede the Annual Increase field.
 - c) On all rosters, heading “Current Ann. Salary/Rate” should read “Current Salary/Rate” and heading “New Annual Salary/Rate” should read “New Salary/Rate.” This change does not apply to download files or Employee Detail pages.
 - d) On the range-based merit roster and step-based merit roster, the Eval. Date field should be validated against the “Oldest Performance Review Date” for the cycle, if one exists. If the user enters an Eval. Date earlier than the Oldest Performance Review Date for the cycle, a warning pop-up message should be displayed.
 - e) On a merit roster employee record, “Eval Date” should not be a required field if a “Perf. Rating” code that corresponds to the standard definition “XNo Performance Evaluation Conducted” is entered.
 - f) All buttons and links displayed on the bottom of the roster page should be repeated at the top of the page.
 - g) Buttons and links should be reorganized to match the mockups in Attachments A and B.

- 3) The Web Merit Download Roster functionality on the roster page should be modified as follows:
 - a) The text file created by the Download Roster function should not include employees who have been deleted from the roster.
 - b) A separate function called “Download Deletes” should be added to the roster page. This function should produce a text file including only the employees who have been deleted from the roster. The Download Deletes file should include all of the fields in the Download Roster file, followed by an additional comments field containing any comments previously entered on the Employee Detail page.

- c) On the download file for the range-based merit roster and the range-based ATB roster, the Pct Incr. field should precede the Annual Increase field.
 - d) The download file should include the title description directly following the title code.
- 4) The Employee Detail page available from the roster page should be modified as follows:
- a) The value in the distribution percent field (“Pct”) should be carried out to four digits after the decimal, for consistency with the EDB.
 - b) The Next Merit Review Code should be displayed without the decimal point.
 - c) The Incr. Amount field should be left blank until an increase has been entered and saved on the roster.
 - d) When the Employee Detail page for any employee (including a deleted employee) is opened, a comments text box should be displayed. Entry of comments should be allowed for any employee and saving comments should not result in employee deletion.
 - e) The ability to edit existing comments should be added.
 - f) When the Employee Detail page opens for an active (non-deleted) employee, the following message should be displayed: “To delete this employee, type comments in the Comments text box and then click ‘Delete from Roster.’”
 - g) When the Employee Detail page opens for a deleted employee, the following message should be displayed: “To restore this employee to the roster, type comments in the Comments text box if desired and then click ‘Restore to Roster.’”
 - h) After an employee is deleted, the message should be changed to read: “Employee record marked as deleted. Click ‘Close’ to return to the roster, and then click 'Save Changes' or the browser refresh button on the roster to display the row as deleted.”
 - i) After an employee is restored to the roster, the message should be changed to read: “Employee record has been restored. Click ‘Close’ to return to the roster, and then click 'Save Changes' or the browser refresh button on the roster to display the row as restored.”
 - j) When the user clicks the “Delete from Roster” button and then confirms deletion on the pop-up, the Employee Detail screen should display the comments text box and the following buttons: “Save Comments,” “Restore to Roster” and “Close.” The user should not have to click “Delete from Roster” twice to produce this result.
 - k) When the user clicks the “Restore to Roster” button, the Employee Detail screen should display the comments text box and the following buttons: “Save Comments,” “Delete from Roster” and “Close.” The user should not have to click “Restore to Roster” twice to produce this result.
 - l) When the user clicks the “Restore to Roster” button, the comments should not be deleted.
- 5) The Roster Department Selection List in both the Merit Review/Input and Audit Past Cycles sections of Web Merit should be modified as follows:
- a) Department codes displayed in the Department No. column should be sorted in alphanumeric order, ascending.
- 6) The Audit Past Data page should be modified as follows:
- a) After the Employee Detail page for a particular employee is opened, only that employee name link should appear “visited” (red) on the roster. Employee name links on other pages of the same roster and on other rosters should remain blue until they themselves have been visited. (This change applies to all types of rosters when viewed in the Internet Explorer version 6 browser.)
 - b) On the Audit Past Data page for range-based merit rosters and range-based ATB rosters, the Pct Incr. field should precede the Annual Increase field.

- c) On the Audit Past Data page for all rosters, heading “Current Ann. Salary/Rate” should read “Current Salary/Rate” and heading “New Annual Salary/Rate” should read “New Salary/Rate.” This change does **not** apply to download files or Employee Detail pages.
 - d) All buttons and links displayed on the bottom of the page should be repeated at the top of the page.
 - e) Buttons and links should be reorganized to match the mockups in Attachments A and B.
- 7) The Web Merit Download Roster functionality on the Audit Past Data page (closed cycles) should be modified as follows:
- a) The text file created by the Download Roster function should not include employees who have been deleted from the roster.
 - b) A separate function called “Download Deletes” should be added to the Audit Past Data page. This function should produce a text file including only the employees who have been deleted from the roster. The records in the file should include all of the fields produced by the Download Roster function, followed by an additional comments field containing any comments previously entered on the Employee Detail page.
 - c) On the download file for the range-based merit roster and the range-based ATB roster, the Pct Incr. field should precede the Annual Increase field.
 - d) The download file should include the title description directly following the title code.
- 8) The Employee Detail page available from the Audit Past Data page should be modified as follows:
- a) The value in the distribution percent field (“Pct”) should be carried out to four digits after the decimal, for consistency with the EDB.
 - b) The Next Merit Review Code should be displayed without the decimal point.
 - c) The Incr. Amount field should be left blank until an increase has been entered and saved on the roster.

Change Requirements

1.0 Merit Cycle Administration

The following characters should not be allowed in the Cycle ID field on the Add New Merit Cycle page under Merit Cycle Administration:

/ * \ : " < > ? |

When the Add button is clicked, the Cycle ID should be validated. If the Cycle ID contains any of the special characters listed above, the following pop-up error message should display:

```
Error: Cycle ID may not contain any of these characters:  
/ * \ : " < > ? |
```

Once the user dismisses the error popup, the application should return to the form¹ with the cursor positioned on the Cycle ID field. The form should not be submitted; the cycle will not be created if the Cycle ID contains one of the characters listed above.

2.0 Roster page

2.1 Employee Name Link

The Employee Name link should be modified so that the web browser does not incorrectly identify an unvisited link as 'visited'. On all roster pages (step-based, open-range, ATB and merit), the Employee Name link should remain blue ("unvisited") until the Employee Detail page for that roster record has been opened.

If an employee has more than one record/link on a given page, only the link that was actually visited should appear visited.

This requirement is applicable to Web Merit pages viewed in the Internet Explorer version 6 browser.

2.2 Column order

On the range-based merit roster and the range-based ATB roster, the order of the Pct Incr. field and the Annual Increase field should be switched, so Pct Incr. precedes Annual Increase. See Attachment A for a suggested modified range based roster layout.

2.3 Column Names

On all rosters, change the heading "Current Ann. Salary/Rate" to "Current Salary/Rate" and change the heading "New Annual Salary/Rate" to "New Salary/Rate." This change does not apply to download files or Employee Detail pages. See Attachments A and B for suggested modified roster page layouts.

¹ The World Wide Web Consortium defines an HTML form as "a section of a document containing normal content, markup, special elements called controls (checkboxes, radio buttons, menus, etc.), and labels on those controls. Users generally "complete" a form by modifying its controls (entering text, selecting menu items, etc.), before submitting the form to an agent for processing (e.g., to a Web server, to a mail server, etc.)" (XHTML 1.0 specification, www.w3.org)

2.4 Evaluation Date Field

2.4.1 *Validation of Evaluation Date vs. Oldest Performance Review Date*

On the range-based merit roster and the step-based merit roster, the Eval. Date field should be validated against the “Oldest Performance Review Date” for the cycle, if one exists. If the user enters an Eval. Date prior to the Oldest Performance Review Date for the cycle and then clicks or tabs into another field, a warning pop-up message should be displayed as follows:

Warning: Evaluation Date is prior to the Oldest Performance Review Date for this cycle.

When the user dismisses the pop-up, he/she should return to the roster and the cursor should be placed on the Perf Rating field, which follows the Eval. Date. Since this is only a warning, the user should be allowed to submit the form even if the Evaluation Date does not pass this validation.

2.4.2 *Allow Blank Evaluation Date if no Performance Evaluation was conducted*

Validation on the range-based and step-based merit rosters should be modified so that the Eval Date is not a required field if the Perf. Rating code entered on that employee record corresponds to the standard definition “XNo Performance Evaluation Conducted.”

2.5 Roster Page Links and Buttons

On the roster page, all links and buttons displayed at the bottom of the page should be repeated at the top of the page, just above the table containing the roster data. Links and buttons should be reorganized to match suggested modified roster page layouts in Attachments A and B. Links include “Back to Dept List,” “Next” and “Prev.” Buttons include “Save Changes,” “Reset,” “Cost Summary,” “Calculate” and “Download.”

2.6 Download Roster

2.6.1 *Exclude Deleted Employees from Download File*

The roster download file should be modified to exclude all employees who have been deleted from the roster.

2.6.2 *Add a New “Download Deletes” function*

A new Download button should replace the existing Download Roster button. The user should be able to click on the Download button to see a drop-down list and choose from two options: “Roster” and “Deletes.” See Attachments A and B for suggested modified roster page layouts. The Download Deletes function should generate a semicolon-delimited electronic text file containing all data for deleted employees on the selected roster. This file should contain the same data fields included in the new roster download file (see Attachment D), followed by the comments previously entered on the Employee Detail screen, if any exist. The filename should consist of the Cycle ID followed by “_DELETES”.

2.6.3 *Order of Pct. Increase and Annual Increase in Download File*

On the download file for the range-based merit roster and range-based ATB roster, the order of the Pct Incr. and Annual Increase fields should be switched, so Pct Incr. precedes Annual Increase. See Attachment D for the new layout of the roster download file.

2.6.4 *Include Title Description in Download File*

The title description should be added to the roster download file, immediately following the title code. See Attachment D for the new layout of the roster download file.

3.0 **Employee Detail Page**

3.1 Distribution Percent

On the Employee Detail page for all rosters, the value in the distribution percent field (“Pct”) should be carried out to four digits after the decimal instead of two, for consistency with the EDB. See Attachment C for a suggested modified Employee Detail page layout.

3.2 Next Merit Review Code

On the Employee Detail page for all rosters, the Next Merit Review Code should display without a decimal point. See Attachment C for a suggested modified Employee Detail page layout.

3.3 Increase Amount field

On the Employee Detail page for open range rosters, the “Incr. Amount” field should be modified so that it remains blank until an increase is entered and saved on the roster. See Attachment C for a suggested modified Employee Detail page layout.

3.4 Comments

The Comments text box should always be available on the Employee Detail page, even for deleted employees. Users should be able to enter comments for any employee and also edit existing comments. Note that this does **not** apply to the Employee Detail page when auditing past cycles.

For any employee on the roster, including a deleted employee, existing comments should be displayed in the Comments text box on the Employee Detail page. By modifying the contents of the text box, users should be able to either add to or replace the existing comments.

There should be only one comments “record” for each employee record on the roster. It is not necessary to maintain a comments history.

The Save Comments function on the Employee Detail page should be modified so that it does not result in employee deletion.

3.5 Delete and Restore Functions

3.5.1 *Saving Comments*

Both the Delete from Roster and the Restore to Roster functions should automatically save any comments entered in the Comments text box. The Restore to Roster function should be modified so that it does not automatically delete the comments.

3.5.2 *Delete and Restore Messages*

When the Employee Detail page opens, a message should be displayed above the buttons as follows:

- For all active (non-deleted) employees on the roster: “To delete this employee, type comments in the Comments text box and then click ‘Delete from Roster.’”

- For all deleted employees: “To restore this employee to the roster, type comments in the Comments text box if desired and then click ‘Restore to Roster.’”

After an employee is deleted, the message should be changed to read: “Employee record marked as deleted. Click ‘Close’ to return to the roster, and then click 'Save Changes' or the browser refresh button on the roster to display the row as deleted.”

After an employee is restored to the roster, the message should be changed to read: “Employee record has been restored. Click ‘Close’ to return to the roster, and then click 'Save Changes' or the browser refresh button on the roster to display the row as restored.”

3.5.3 *Delete and Restore Buttons*

When the user clicks the “Delete from Roster” button and then confirms deletion on the pop-up, the Employee Detail screen should display the comments text box and the following buttons: “Save Comments,” “Restore to Roster” and “Close.” The user should not have to click “Delete from Roster” twice to produce this result.

When the user clicks the “Restore to Roster” button, the Employee Detail screen should display the comments text box and the following buttons: “Save Comments,” “Delete from Roster” and “Close.” The user should not have to click “Restore to Roster” twice to produce this result.

4.0 **Roster Department Selection List**

Department codes displayed in the Department No. column of the Roster Department Selection List should be sorted in alphanumeric order, ascending.

5.0 **Audit Past Data Page**

5.1 Employee Name Link

The Employee Name link should be modified so that the web browser does not incorrectly identify an unvisited link as 'visited'. On all Audit Past Data roster pages (step-based, open-range, ATB and merit), the Employee Name link should remain blue (“unvisited”) until the Employee Detail page for that roster record has been opened.

If an employee has more than one record/link on a given page, only the link that was actually visited should appear visited. This requirement applies to Web Merit pages viewed in the Internet Explorer version 6 browser.

5.2 Column order

On the range-based merit and range-based ATB Audit Past Data pages, the order of the Pct Incr. field and the Annual Increase field should be switched, so Pct Incr. precedes Annual Increase. See Attachment A for a suggested modified range based roster layout.

5.3 Column Names

On the all Audit Past Data pages, change the heading “Current Ann. Salary/Rate” to “Current Salary/Rate” and change the heading “New Annual Salary/Rate” to “New Salary/Rate.” This change does not apply to download files or Employee Detail pages. See Attachments A and B for suggested modified roster page layouts.

5.4 Audit Past Data Page Links and Buttons

On the Audit Past Data page, all links and buttons displayed at the bottom of the page should be repeated at the top of the page, just above the table containing the roster data. Links and buttons

should be reorganized to match the suggested modified roster page layouts in Attachments A and B. Links include “Back to Dept List,” “Next” and “Prev.” Buttons include “Cost Summary” and “Download.”

5.5 Download Roster for Closed Cycles

5.5.1 *Exclude Deleted Employees from Download File*

The roster download file for closed cycles should be modified to exclude all employees who have been deleted from the roster.

5.5.2 *Add a New “Download Deletes” function*

A new button labeled “Download” should replace the existing “Download Roster” button on the Audit Past Data page. The Download button should open a drop-down list with two options: “Roster” and “Deletes.” See Attachments A and B for suggested modified roster page layouts. The Download Deletes function should generate a semicolon-delimited electronic text file containing data for deleted employees on the selected Audit Past Data page. This file should contain the same data fields included in the new Audit Past Data download file, followed by any comments that may have been previously entered on the Employee Detail page. See Attachment E for the Audit Past Data download file format. The filename should consist of the Cycle ID followed by “_AUDIT_DEL”.

5.5.3 *Order of Pct. Increase and Annual Increase in Download File*

On the Audit Past Data download file for the range-based merit roster and range-based ATB roster, the order of the Pct Incr. and Annual Increase fields should be switched, so Pct Incr. precedes Annual Increase. See Attachment E for the new layout of the Audit Past Data download file.

5.5.4 *Include Title Description in Download File*

The title description should be added to the Audit Past Data roster download file, immediately following the title code. See Attachment E for the new layout of the Audit Past Data download file.

6.0 Audit Past Data Employee Detail Page

6.1 Distribution Percent

On the Audit Past Data Employee Detail page for all rosters, the value in the distribution percent field (“Pct”) should be carried out to four digits after the decimal instead of two, for consistency with the EDB. See Attachment C for a suggested modified Employee Detail page layout.

6.2 Next Merit Review Code

On the Audit Past Data Employee Detail page for all rosters, the Next Merit Review Code should display without a decimal point. See Attachment C for a suggested modified Employee Detail page layout.

7.0 Audit Past Cycle Roster Department Selection List

Department codes displayed in the Department No. column of the Roster Department Selection List for closed cycles should be sorted in alphanumeric order, ascending.

Attachment A – Range-based Roster Screen

RANGE BASED MERIT ROSTER: [EEB HX MERIT 0207](#)

Cycle Status: Open for Departmental Input

Cycle Date: 02/07

BW Effective Date: 01/28/2007

MO Effective Date: 02/01/2007

Enter the evaluation date and performance rating, then the annual increase or the percent increase. Click "Save Changes" at any time to save the data you have entered.

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Cost Summary		Download... ▼		Calculate		Reset		Save Changes	
Name/ Employee ID	Title Code/Dept Title Dept Desc.	Pay Sched./ Time%	Current Salary/ Rate	Grade	Eval.Date (MM/YY)	Perf. Rating	Pct Incr.	Annual Increase	New Salary / Rate
COE, CHRIS 000050068	5428 / 827701 HOSPITAL EDUCATION	MO 0.40	20.0671		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FRESCO, AL 000050032	9341 / 827701 HOSPITAL EDUCATION	MO 0.50	18.8600		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
THATT, DON 999888015	5428 / 827701 HOSPITAL EDUCATION	MO 1.00	38400 3200.00		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Cost Summary		Download... ▼		Calculate		Reset		Save Changes	
Back to Dept List		<ul style="list-style-type: none"> Roster Deletes 							
								Prev Next	

Attachment B – Step-based Roster Screen

STEP BASED MERIT ROSTER: [EEB TX JAN 2007](#)

Cycle Status: Open for Departmental Input
 Cycle Date: 01/07 BW Effective Date: 12/31/2006 MO Effective Date: 01/01/2007

Enter the evaluation date, the performance rating, and the recommended step increase. Click "Save Changes" at any time to save the data you have entered.

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<input type="button" value="Cost Summary"/>		<input type="button" value="Download..."/>		<input type="button" value="Calculate"/>		<input type="button" value="Reset"/>		<input type="button" value="Save Changes"/>		
Name/ Employee ID	Title Code/Dept. Title Dept Desc.	Pay Sched./ Time%	Current Salary/ Rate	Curr. Step	Eval.Date (MM/YY)	Perf. Rating	Recomm. Incr.	New Step	Pct Incr.	New Salary / Rate
ATOR, RAY D. 000050086	6102 / 827701 HOSPITAL EDUCATION	MO 0.40	38280 3190.00	1.0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BEGONE, ABE 333333042	7704 / 827701 HOSPITAL EDUCATION	MO 1.00	36036 3003.00	1.0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BEGONE, ANNE 333333107	7704 / 827701 HOSPITAL EDUCATION	MO 1.00	39636 3303.00	1.0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BELL, CY 501000047	7704 / 827701 HOSPITAL EDUCATION	MO 1.00	41400 3450.00	4.0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Cost Summary"/>		<input type="button" value="Download..."/>		<input type="button" value="Calculate"/>		<input type="button" value="Reset"/>		<input type="button" value="Save Changes"/>		

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Attachment C – Employee Detail Screen

**RANGE BASED ROSTER
EMPLOYEE DETAIL**

Employee ID : 999888007

Name : PENDANT, CODY

Cycle : EEB HX MERIT 0207

Home Department Code : 826301

Home Department : SECURITY

Most Recent Hire Date : 12/01/2001

Next Merit Review Date : 12/06

Next Merit Review Code : 2

Probationary Period End Date :

Appointment 10 SECURITY

Title Code : 9307 Title : SOCIAL WORKER II

Appointment Begin : 12/01/2001 TUC/Appt Rep : HX / C

Appointment End : Indefinite Rate Code : A

Pay Schedule : MO Appointment Type Code : 2

Dist#	FAU/Translation	DOS	Pct	Old Annual Salary / Old Rate	New Annual Salary / New Rate	% Incr.	Incr. Amount	Begin Date	End Date	Cost	FY Cost
11	3726301 19900 1 LONG ACCOUNT NAME FOR SECURITY	REG	1.0000	54000.00 4500.00				12/01/2001	Indefinite		

Comments:

To delete this employee, type comments in the Comments text box and then click 'Delete from Roster.'

Attachment D - Roster Download file format

Range-Based Merit Roster and Range-Based ATB Roster:

- Employee Name
- Employee ID
- Department Number
- Department Description
- Title Code
- Title Description
- Pay Schedule
- %Time
- Current Annual Salary
- Current Rate
- Grade
- Evaluation Date
- Performance Rating
- % Increase
- Annual Increase
- New Annual Salary
- New Rate
- Self Update Flag

Step-based Merit Roster and Step-based ATB Roster:

- Employee Name
- Employee ID
- Department Number
- Department Description
- Title Code
- Title Description
- Pay Schedule
- %Time
- Current Annual Salary
- Current Rate
- Current Step
- Evaluation Date
- Performance Rating
- Recommended Increase
- New Step
- % Increase
- New Annual Salary
- New Rate
- Self Update Flag

Attachment E – Audit Past Data Roster Download file format

Range-Based Merit Roster and Range-Based ATB Roster:

- Employee Name
- Employee ID
- Department Number
- Department Description
- Title Code
- Title Description
- Pay Schedule
- % Time
- Current Annual Salary
- Current Rate
- Grade
- Evaluation Date
- Performance Rating
- % Increase
- Annual Increase
- New Annual Salary
- New Rate
- Self Update Flag
- Error Code

Step-based Merit Roster and Step-based ATB Roster:

- Employee Name
- Employee ID
- Department Number
- Department Description
- Title Code
- Title Description
- Pay Schedule
- % Time
- Current Annual Salary
- Current Rate
- Current Step
- Evaluation Date
- Performance Rating
- Recommended Increase
- New Step
- % Increase
- New Annual Salary
- New Rate
- Self Update Flag
- Error Code