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SR82194 Requirements
2008 Web Merit Enhancements, Phase I (Extract and Costing)

Objective:

To implement mission-critical extract and costing-related enhancements to the Web Merit online application, so that campuses may utilize the application to process October 2008 salary increases successfully.

Project Type:

This is a series of enhancements to an existing application.

Requested by:

HR&B HR and Compensation Policy

Analyst:

Beth Burkart

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 potential October 2008 merit cycles.

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Background

UCOP Information Systems Support met with representatives from Santa Cruz, San Diego, Santa Barbara, Los Angeles, Riverside, and San Francisco several times in January and February 2008 to discuss how Web Merit could be modified to better meet their business needs. Items were documented, prioritized, and grouped into high-level areas (Extract and Costing, Administrative Functions, Roster, and Reporting). The highest priority items in the areas of the EDB Extract and Costing are included in this phase I request, which impacts Web Merit screens, batch extract and Cost Summary logic and display. This request is the first in a series of 2008 requests.

The work group's request to remove future distributions from the online Costing Summary led to discussions with the programmers and the work group regarding the Fiscal Cost column calculation. Rather than costing on all distributions, the group decided to cost only on distributions current as of the cycle effective date and to project costs based on those distributions through the end of the fiscal year.

Change Requirements

1.0 DOS Code Selection in EDB Extract

Currently, a Distribution is loaded to the Web Merit database (from the EDB) if the Distribution is active on or after the effective date of the increase and if the DOS code in the Distribution is coded as other than "Differential" in the PPS DOS table (Pay Category = "D"). This rule results in loading distributions that may not be pertinent to the merit increase process, such as Perquisites and various by-agreement payments. Campuses would like to include in the EDB extract all "regular-equivalent" DOS codes, such as "REG", in addition to those that normally have regular rates and should have their rates increased, such as "OTS" and "OTP." (This group contains the great majority of DOS codes found in EDB Distributions that are typically coded with "Regular" rates of pay.) They would also like to include DOS codes such as "TOC" or "OTH." They would like to exclude all DOS codes (e.g., PRQ and STP) that are designated as "by-agreement" – Calculation Process = "03" (Amount added to gross).

Campuses have suggested that this DOS code screening might be accomplished by selecting distributions that satisfy either of the following criteria:

- Regular-Rated, time-based DOS codes having Pay Category = "N" (Regular), Calculation Process = "01" (Rate times Time) or "02" (Rate times Time times Factor)

OR

- DOS codes having Pay Category = "A" (Additional), Hours Type = "O" (Overtime) or "P" (Overtime-Premium), and Calculation Process = "01" (Rate times Time) or "02" (Rate times Time times Factor)

2.0 Make Next Salary Review Code Optional

2.1 Administration Pages

Campuses would like the Next Salary Review Code(s) field on the Cycle Definition (Add New Merit Cycle and Update Merit Cycle) pages to be optional. The asterisk should be removed from this field on both pages. If no boxes are checked on the Next Salary Review Code(s) field, data should be extracted from the EDB regardless of the value of "Next Salary Review Code."

There is currently a note at the top of the Add New Merit Cycle and Update Merit Cycle pages stating:

(Note: For Across-the-Board increases, Next Salary Review Code and New Next Salary Review Date fields are optional.)

This note should be modified to state:

(Note: For Across-the-Board increases, the New Next Salary Review Date field is optional.)

2.2 Batch Extract Program

The batch extract program should be modified to extract data without regard to the Next Salary Review Code if no boxes are checked in the Next Salary Review Code(s) field on the Cycle Definition pages.

3.0 Control Step

To support the display of Control Step on the Costing Summary, a new optional entry field should be added to the Add New Merit Cycle and Update Merit Cycle pages. The field label should be “Control Step.” It is suggested that this field be placed next to the existing Control Percent field. See Attachment A for a sample Add New Merit Cycle page.

The user should be able to enter a numeric value into this field for step-based cycles if desired. The valid format for this field is 9.9. Update should be blocked if a non-numeric value is entered. The following message should be displayed when the user has entered a non-numeric value: “Please enter a valid numeric value (0.0 through 9.9) in the Control Step field.” It is not necessary to validate to make sure that the Control Step is only entered for a step-based cycle.

The Control Step information should also be included in the Eligibility Criteria pop-up for step-based rosters, following the Control Percent. See Attachment C for an example.

4.0 Costing Summary

4.1 Exclude Future Distributions

Future distribution lines should be excluded from the budget and costing (e.g., Cost Summary pop-up), but continue to be included in the PPS update. Only distributions that are current as of the effective date of the merit should be used in the Cost Summary calculations.

For employees paid on a biweekly cycle, the cycle’s Biweekly Effective Date should be used to determine if the distribution is current. Biweekly Effective Date is an optional field on the cycle administration pages. If no Biweekly Effective Date was entered for the cycle, then the Monthly Effective Date should be used to determine whether a biweekly-paid employee’s distribution is current or future. For employees **not** paid biweekly, the Monthly Effective Date for the cycle should be used to determine if a distribution is current or future.

Note that this change only impacts the web-based costing reports in the online Web Merit application, and does not impact the costing transactions generated at the end of the cycle for use in the PPS costing process.

4.2 Fiscal Cost Calculation

Currently, the Fiscal Cost calculation in the Costing Summary prorates both current and future distributions. Since future distributions will no longer be included in the Costing Summary pop-up, the Fiscal Cost calculation should be modified.

The Fiscal Cost calculation currently uses the earlier month of fiscal end date or Distribution End Date as the end month when it prorates. It should be modified to use only the fiscal end date as the end month for prorating, ignoring Distribution End Date. This will, in effect, project the current distributions out to the end of the fiscal year.

The Fiscal Cost calculation currently uses the later month of the cycle date or Distribution Begin Date as the start month when prorating. This should remain the same.

4.3 DOS Code Selection

For the purpose of costing in the online Web Merit application (e.g., the Costing Summary popup), campuses would like to include all “regular-equivalent” DOS codes, such as “REG,” that presumably represent the primary base of employment. They would like to exclude other categories loaded to the WM database that are regular-rated, but represent additional compensation in excess of this, such as overtime of various types. It is suggested that this might be accomplished by including on the Costing Summary page only distribution records that meet the following criteria:

- Regular-Rated, time-based DOS codes having Pay Category = “N” (Regular), Hours Type = “R”, and Calculation Process = “01” (Rate times Time)

4.4 Refresh Button

A refresh button should be added to the Costing Summary pop-up such that when the button is clicked, the costing data will be refreshed to reflect all Roster data that has been saved. This will assist users who keep both the Roster page and the Costing Summary pop-up open simultaneously.

4.4.1 Error Handling

There is a possibility that a user may leave the Costing Summary pop-up open while backing out of a given Roster and opening another. If they, then, click the Refresh button on the open Costing Summary pop-up, an abend will occur. Error handling should be performed so that, under these circumstances, the message “This Costing Summary information matches a different Roster. Please close this window and click on the Cost Summary button again.” is displayed.

See Attachment B for a sample Costing Summary page.

4.5 Numeric Data Display

Numeric data on the Costing Summary pop-up should be right justified.

4.6 Department Code and Name Display

The department code and name associated with the Roster Department Selection link the user followed to open the roster should be displayed on the Costing Summary page. This may represent a department at the lowest level or a rollup level.

4.7 Control Step Display

A new display field should be added to the title on the Costing Summary for step-based rosters. (See Attachment B.) The text “Control Step=N.N” should appear following the Control Percent value, where N.N is the control step entered on the Administration page. If no Control Step was entered on the Administration page for the cycle, the “Control Step=N.N” text should be omitted, and only the Control Percent should be shown.

Attachment A – Add New Merit Cycle Page with Control Step

Add New Merit Cycle

Fields with asterisks(*) are required

(Note: For Across-the-Board increases, Next Salary Review Code and New Next Salary Review Date fields are optional.)

Cycle ID: <input type="text"/>	Cycle Date: <input type="text"/> (mm/yy)
Program Type: <input type="text" value="Select one"/> ?	Sub Location: <input type="text" value="ALL"/> ?
Description: <input type="text"/>	Cycle Type: <input type="text" value="Select one"/>
Collapsing Option: <input type="text" value="Select one"/>	Next Salary Review Date: <input type="text"/> (mm/yy)
Next Salary Review Code(s): <input type="checkbox"/> Eligible for merit increase <input type="checkbox"/> Eligible for special perf. award <input type="checkbox"/> Eligible for trainee increase <input type="checkbox"/> No salary review / at maximum (Check all that apply)	Appointment Type(s): <input type="checkbox"/> Contract <input type="checkbox"/> Career <input type="checkbox"/> Partial Year Career <input type="checkbox"/> Limited <input type="checkbox"/> Casual/Restricted <input type="checkbox"/> Per diem <input type="checkbox"/> Floater (Check all that apply)
Appointment Representation Code: <input type="text" value="Select one"/>	Collective Bargaining Code: <input type="text" value="Select one"/> ?
Monthly Effective Date: <input type="text"/> (mm/dd/yy)	Biweekly Effective Date: <input type="text"/> (mm/dd/yy)
Monthly Reduction - End Date: <input type="text"/> (mm/dd/yy)	Biweekly Reduction - End Date: <input type="text"/> (mm/dd/yy)
New Next Salary Review Date: <input type="text"/> (mm/yy)	Control/ATB Percent: <input type="text"/> Control Step : <input type="text"/>
Oldest Performance Review Date: <input type="text"/> (mm/yy)	Title Range: <input type="text"/> - <input type="text"/> more
Eligibility Criteria - Monthly Probation Date: <input type="text"/> (mm/dd/yy)	<input type="radio"/> Limit To <input type="radio"/> Exclude <input type="radio"/> None
Eligibility Criteria - Monthly Probation Date: <input type="text"/> (mm/dd/yy)	Eligibility Criteria - Biweekly Probation Date: <input type="text"/> (mm/dd/yy)
Allow Over Maximum Increases: <input type="radio"/> Yes <input checked="" type="radio"/> No ?	Eligibility Criteria - Hire Date: <input type="text"/> (mm/dd/yy)

Note: Asterisk has been removed from Next Salary Review Code.

Attachment B – Costing Summary with Control Step, Department and Refresh Button

Costing Summary for selected Roster of Cycle : CYCLE3-STEP-MERIT Department 18805 Human Resources Control Percent=3.00 Control Step=2.5							
Fund Source	Current Salary Base	Merit Allocation	New Salary Base	Annual Cost	Under Over	Annual Cost%	Fiscal Cost
STATE GENERAL FUNDS ADMIN	880,298	26,408	926,096	45,797	-19,388	5.20	34,347
SUB-TOTAL	880,298	26,408	926,096	45,797	-19,388	5.20	34,347
HOSPITAL FUNDS	132,479	3,974	132,479	0	3,974	0.00	0
SUB-TOTAL	132,479	3,974	132,479	0	3,974	0.00	0
GRAND TOTAL	1,012,778	30,383	1,058,575	45,797	-15,413	4.52	34,347

Close
Refresh

Note that the dollars and percents are right-justified.

Attachment C – Sample Eligibility Criteria pop-up with Control Step

Eligibility Criteria

Cycle Identifier	CFG-CYCLE5
Cycle Date	10/06
Sublocation	ALL
Program Type	CBU
Description	STEP MERIT TX
Cycle Status	D - Open for Departmental Review
Cycle Type	Merit - Step
Collapsing Option	Home Dept
Next Salary Review Date	10/05
Next Salary Review Code(s)	Six Month Increase Merit Increase Special Performance Award Trainee Increase No salary review / at maximum
Appointment Type(s)	Contract Regular/Career Limited Partial year/Career
Oldest Performance Review	
Elig Criteria: Hire Date	
Elig Criteria: Monthly Probation Date	
Elig Criteria: Biweekly Probation Date	
Collective Bargaining Code	TX
Appointment Representation Code	COV
Biweekly Effective Date	09/24/06
Monthly Effective Date	10/01/06
Biweekly Reduction End Date	
Monthly Reduction End Date	
Control Percent	4.00
Control Step	1.0
Over Maximum Indicator	N
Remaining Fiscal Year Months	9
New Next Salary Review Date	10/07
Title Range	