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**SR82219 Requirements  
2008 Web Merit Roster Enhancements**

**Objective:**

To implement mission-critical Roster-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 Mid-July, 2008 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 regularly with representatives from the various campuses in the first half of 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 Roster enhancements have been split up into two different Service Requests for manageability. Several of the high-priority items related to the Web Merit Roster are included in this request.

## Change Requirements

### 1.0 Print Roster

In addition to the existing “Roster” download option, users should be able to create a PDF file containing the entire Roster currently being viewed by choosing a selection in the “Select Download” dropdown. Creating the PDF file will allow users to print a copy of the entire Roster for approval purposes. Since this function does not currently exist, they now have to print each page separately, and there is no designated signoff area.

#### 1.1 Roster Dropdown modifications

Another choice titled “Printed Roster (PDF)” should be added to the existing dropdown list on the Roster.

#### 1.2 Printed Roster PDF Design

The top portion of the printed Roster should include the type of cycle and the cycle name, the department code and name corresponding to the Roster Department Selection List link the user followed to open the Roster, the Cycle Status, Report date (current date), Cycle Date, Biweekly Effective Date and MO Effective Date.

The printed Roster should contain all of the same columns, including headings and data, found on the online Roster page. In addition, any error codes such as RLM (Rate Less than Minimum) should appear on the appropriate line(s). There should be a key below the Roster data containing the error codes present on that Roster and the corresponding descriptions (like the key on the online Roster). Employees who have been deleted from the Web Merit Roster should be omitted from this “printed” roster.

Costing information should appear at the bottom of the “printed” Roster. The costing information should include the label “Costing Data:” followed by a line of headings and then the total line from the Costing Summary corresponding to that particular Roster. This costing information should exactly match the data displayed on the Costing Summary pop-up. The same selection criteria should apply in terms of DOS codes and exclusion of future distributions (see SR82194 on Web Merit Extract and Costing Enhancements for specifics).

For the purpose of authorization, a signature area should appear at the bottom of the printed Roster, below the costing information. The signature area should include two sets of labeled lines, each set consisting of “Authorized by:” then one line for signature, one line for name, one line for title, and one line for date. See the mockup for suggested labels.

With regard to pagination, it is important to keep both the Costing Data area and the Signature area intact. If there are multiple pages, page breaks should not occur partway through either the Costing Data area or the Signature area.

See Attachment A for a sample of the printed Roster. Note: Please ignore the boxes around the text fields in the sample. They should not appear on the printed Roster. In addition, this is just a mockup and the costing data on the sample does not necessarily correspond to the Roster data.

## 2.0 Allow Zero Merit Increase

The Web Merit Range Based Roster currently does not easily accept zero merit entries (it is possible to save a roster with a zero merit increase, but the zero entry must be the last entry made on the Roster). The current workaround is cumbersome.

### 2.1 Allow Zero Merit Increase on Open Range Rosters

Release 1770 (6/07) modified validation on the range-based and step-based merit rosters 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.”

In addition, campuses have a need to be able to enter a “zero” recommended increase even if a performance evaluation was conducted. Currently, if the performance rating is not “XNoPerformance Evaluation Conducted” and a recommended percent increase of 0 is entered on an Open Range Roster, an online edit changes the 0 to blank. Once the recommended increase is blank, if the user tries to “calculate” or “save,” an error message appears stating that “all values have not been entered for *employee name*.”

When the user enters a “0” increase and then clicks on “calculate” or “save,” the zero should be retained in the increase field. “Calculate” or “Save” should not produce an error message.

Currently there is a Roster edit that issues an error message if the user enters a zero increase along with a performance rating that is set up (on the Performance Rating Table) to “require” a non-zero value. This edit does not need to be modified.

### 2.2 Zero Merit and Budget Allocation

The employee’s salary dollars should be included in the budget allocation on the Costing Summary, regardless of the zero merit, as long as the record meets the other Costing Summary selection criteria. (Note: if an employee is deleted from the Roster, his/her salary dollars should **not** be included in the budget allocation.)

### 2.3 Zero Merit and EDB Update Transactions

For both types of rosters (step-based and open range), EDB updates are still required even if there is a zero recommended increase. The performance evaluation rating and performance evaluation date at the appointment level and the Next Salary Review Date at the employee level should be updated in the EDB. If there is a zero merit increase, no new distribution should be created in the EDB.

### 2.4 Zero Merit and TCT Rate Lookup on Step Rosters

Currently when the user enters a zero recommended increase on a step roster and then clicks “calculate” or “save changes,” Web Merit references the Title Code Table (TCT) and brings in the latest rate for the employee’s step. This value is displayed in the New Salary/Rate column. This can result in the New Salary/Rate value exceeding the Current Salary/Rate value, in spite of the zero increase, in cases where a range adjustment has occurred. This is a problem because it results in an undesired update to the employee’s rate in the EDB in spite of the zero merit.

The application should be modified so that, when a user enters a zero merit on a Step Roster, and then clicks “calculate” or “save changes,” the Current Salary/Rate is copied into the New Salary/Rate, and the TCT is not referenced.

### **3.0 Direct Downloads to Excel**

Currently the Roster page download feature allows you to open or save either the whole roster or only the deleted roster records as a text file. This is an issue at the campuses, where many users of this feature are not familiar with the process of importing a text file into Excel. The campuses would like to allow users to directly open or save the downloaded file in Excel format, without having to go through the import process.

The existing roster downloads (Download Roster and Download Deletes) process should be modified so that the files are produced in Microsoft Excel format (.xls), rather than as text files.

Codes that are downloaded directly to Excel (e.g., Employee ID, Title Code, Department Code, etc.) should retain their leading zeros and should be in a “text” format rather than a “numeric” format.

### **4.0 RGC Error Code Behavior on Step Based and Open Range Rosters**

#### **4.1 Roster**

Currently if a cycle does not allow over max increases, the roster cannot be saved if the RGC (existing salary rate is more than the max rate found in TCT) flag is present on any Roster record.

The application should be modified so that the presence of the RGC error code does not prevent the Roster from being saved. In addition, users should be able to enter and save evaluation date and performance rating for an employee, even if the RGC condition is present.

If the RGC error code is present, entry of performance evaluation date and evaluation rating should be allowed on that Roster record; other fields, such as % increase and annual increase on the open range rosters and recommended increase, new step and percent increase on step rosters should be blanked out and protected.

#### **4.2 Costing Summary**

On the Costing Summary pop-up, the employee’s salary should enter into both the Current Salary Base and New Salary Base calculations.

#### **4.3 Employee Detail Page**

On the Employee Detail page for a step roster, the New Rate and New Step should be populated (and will match the Old Rate and Old Step). On the Employee Detail page for an open range roster, the New Annual Salary/New Rate should match the Old Annual Salary/Old Rate, and the % Increase and Increase Amount should be blanked out. The Cost and Fiscal Year Cost on the Employee Detail page for both step and open range rosters should be blanked out to be consistent with the way zero merits are handled.

#### **4.4 EDB Update**

RGC should be treated the same way as a zero merit for the purpose of the EDB update:

The performance evaluation rating and performance evaluation date at the appointment level and the Next Salary Review Date at the employee level should be updated in the EDB. No new distribution should be created in the EDB.

## 4.5 FAQ

The Web Merit Frequently Asked Questions page describes the RGC behavior in the section titled “Why can’t I save changes to my roster?” and this must be modified to reflect the enhancements requested in this Service Request.

The following paragraph:

“If your cycle is defined to disallow increases over the maximum rate for a Title Code, records marked ‘RGC’ (‘The current rate is greater than the TCT rate’) will prevent you from saving the roster. You must correct these errors before submitting the roster.”

Should be replaced with this:

“If your cycle is defined to disallow increases over the maximum rate for a Title Code, you will not be able to enter an increase for Roster records marked ‘RGC’ (‘The current rate is greater than the TCT rate’). However, you will be able to enter an evaluation date and a performance rating for the employee and save the Roster.”

## 5.0 Costing Summary Pop-up and START Program RTP DOS Code

Currently, the data in the Costing Summary pop-up includes distributions with Description of Service (DOS) code RTP (Reduction in Time Program), which was set up for the START (Staff and Academic Reduction in Time) program. Although the RTP DOS code indicates a **reduction** in time, the associated percentages are currently being **added** into the costing calculations as if they were regular time. Since participation in this program is temporary and variable, campuses would like to exclude distributions with the RTP DOS code from the Costing Summary pop-up.

Note: DOS codes RTS (Reduction in Time – Shift) and RTB (Reduction in Time - Stipend) were also set up for the START program. Since they do not meet the extract program’s DOS selection criteria as specified in SR82194, they are not included in the EDB extract for Web Merit.

## 6.0 FY Cost on Employee Detail Page

Currently Fiscal Year Cost calculations are performed independently for the purposes of the Employee Detail page and the Costing Summary page. Depending on individual employee data, there may be a difference in the number of months used to calculate the Fiscal Cost. The Costing Summary Fiscal Cost calculation uses the later month of the cycle date or Distribution Begin Date as the start month when prorating. The Employee Detail Fiscal Cost calculation uses the cycle date as the start month when prorating. The Employee Detail Fiscal Cost calculation should be modified so that it uses the same “start date” logic used by the Costing Summary when prorating.

Currently, the Fiscal Cost calculation on both the Costing Summary pop-up and the Employee Detail page use the end of the fiscal year for the “end date” when prorating. This should remain the same.

# Attachment A – Printed Roster PDF Format

**RANGE BASED MERIT ROSTER: CYCLE1-OR-MERIT**  
DEPARTMENT: 999999 DEPTNAME

Cycle Status: Open for Departmental Input

Report Date: mm/dd/yy

Cycle Date: 06/07

BW Effective Date: 06/03/2007

MO Effective Date: 06/01/2007

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
BLOOPER, MISTY M 777555009	9307 / 804918 CHANCELLORS OFFICE	BW 1.00	65000 2500.00		01/07	MET	2.00	1300.00	66300 2550.00
CHEESE, PHIL E. 777555012	9307 / 804918 CHANCELLORS OFFICE	MO 1.00	63900 5325.00		12/06	SUP	5.00	3195.00	67095 5591.25
COE, CHRIS 000050068	5428 / 827701 HOSPITAL EDUCATION	MO 0.40	20.0671		01/07	SUP	11.00	4609.01	22.2700
COORDOR, SLIM 777555011	9307 / 804918 CHANCELLORS OFFICE	MO 1.00	63900 5325.00		03/07	MET	3.00	1917.00	65817 5484.75
DISH, CANDI 888222888	9307 / 804918 CHANCELLORS OFFICE	MO 1.00	66804 5567.00		06/07	SUP	10.00	6680.40	73484 6123.70
FRESCO, AL 000050032	9341 / 827701 HOSPITAL EDUCATION	MO 0.50	18.8600		06/07	SUP	5.00	1968.98	19.8000
GREAT, RAUL THE 777555033	5428 / 804918 CHANCELLORS OFFICE	BW 1.00	39000 1500.00		12/06	MET	3.00	1170.00	40170 1545.00 RLM
JOHNSON, WILLIAM 888111888	9248 / 804918 CHANCELLORS OFFICE	MO 1.00	87288 7274.00		05/07	SUP	7.00	6110.16	93398 7783.18 RLM
LETTERMAN, WALTER P 777555017	9307 / 804918 CHANCELLORS OFFICE	MO 1.00	72000 6000.00		12/06	SUP	3.00	2160.00	74160 6180.00
LUCKY, JAMES P 777555020	5428 / 804918 CHANCELLORS OFFICE	MO 1.00	39888 3324.00		12/06	SUP	3.00	1196.64	41085 3423.72 RLM
MILDER, RAUL T 777555003	5428 / 804918 CHANCELLORS OFFICE	MO 0.50	39924 3327.00		12/06	MET	1.00	399.24	40323 3360.27 RLM
MOON, JOHNNIE J 777555010	9307 / 804918 CHANCELLORS OFFICE	BW 1.00	78000 3000.00		12/06	MET	1.00	780.00	78780 3030.00

• RLM: new rate is less than the minimum found in TCT.

Costing Data:

Current Salary Base	Merit Allocation	New Salary Base	Annual Cost	Under	Over	Annual Cost%	Fiscal Cost
1,012,778	20,383	1,058,575	45,797	-15,413	4.52	34,347	

Approved by:

Approved by:

Signature

Signature

Name

Name

Title

Title

Date

Date