



Texas Skyward User Group Conference

Salary Negotiations Budgeting Scenarios & Reporting

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Salary Negotiations Budgeting Scenarios & Reporting



This session demonstrates setting up & comparing different budgeting scenarios, generating the plan detail, and reporting.

- Creating Different Budgeting Scenarios
- Generating Plan Detail
- Plan Reporting

Importing from Salary Negotiation

Import Assignment from Sal Neg Plans - WH\AD\SN\PL\SE\IP - 10784 - 05.18.02.00.11 - Internet Explorer

Import Assignment from Sal Neg Plans

Available Plans for Import

Select	Plan Description	Year
<input type="checkbox"/>	2014-2015 JG Sample Plan	2014
<input type="checkbox"/>	2014-2015 Roll to EM plan-JK	2014
<input type="checkbox"/>	2015-16 Base Plan (js)	2015
<input type="checkbox"/>	2015-2016 Base Plan	2015
<input type="checkbox"/>	2015-2016 Working Plan	2015
<input type="checkbox"/>	2016-2017 Base Plan	2016
<input type="checkbox"/>	2016-2017 COPY PLAN	2016
<input type="checkbox"/>	2016-2017 JP Working Plan	2016
<input type="checkbox"/>	2016-2017 Proposed Plan (js)	2016
<input type="checkbox"/>	2016-2017 Working Plan	2016
<input type="checkbox"/>	2017-2018 Base Plan	2017
<input type="checkbox"/>	2017-2018 Test Plan	2017
<input checked="" type="checkbox"/>	2018-2019 Base Plan	2018

21 records displayed

Import Options

If Position Already Exists Do Not Create a New One ?

If Assignment Already Exists Do Not Create a New One ?

Allow Duplicate Vacant Assignments to be Imported

Process Blank Job Types

Clear Pay Frequency Override Field

Roll Fast Track Open Positions

Overwrite ALL Position Control Group values on destination plan

Import Position Control Group Users

Include Assignment Notes

Exclude Assignment if the Termination Date is prior to:

Select Job Types:

- ADMINST/PROF - PG 1
- ADMINST/PROF - PG 2
- ADMINST/PROF - PG 3
- ADMINST/PROF - PG 4
- ADMINST/PROF - PG 5
- ADMINST/PROF - PG 6

53 of 53 records selected

Roll Selected Funds:

- 204 - 204 SCRAMBLED DESCRIPTIO
- 211 - TITLE 1
- 219 - 219 SCRAMBLED DESCRIPTIO
- 224 - 224 SCRAMBLED DESCRIPTIO
- 225 - 225 SCRAMBLED DESCRIPTIO
- 747 - 747 SCRAMBLED DESCRIPTIO

24 of 63 records selected

[Report](#)

[Import](#)

[Back](#)

Employee Selection Parameters

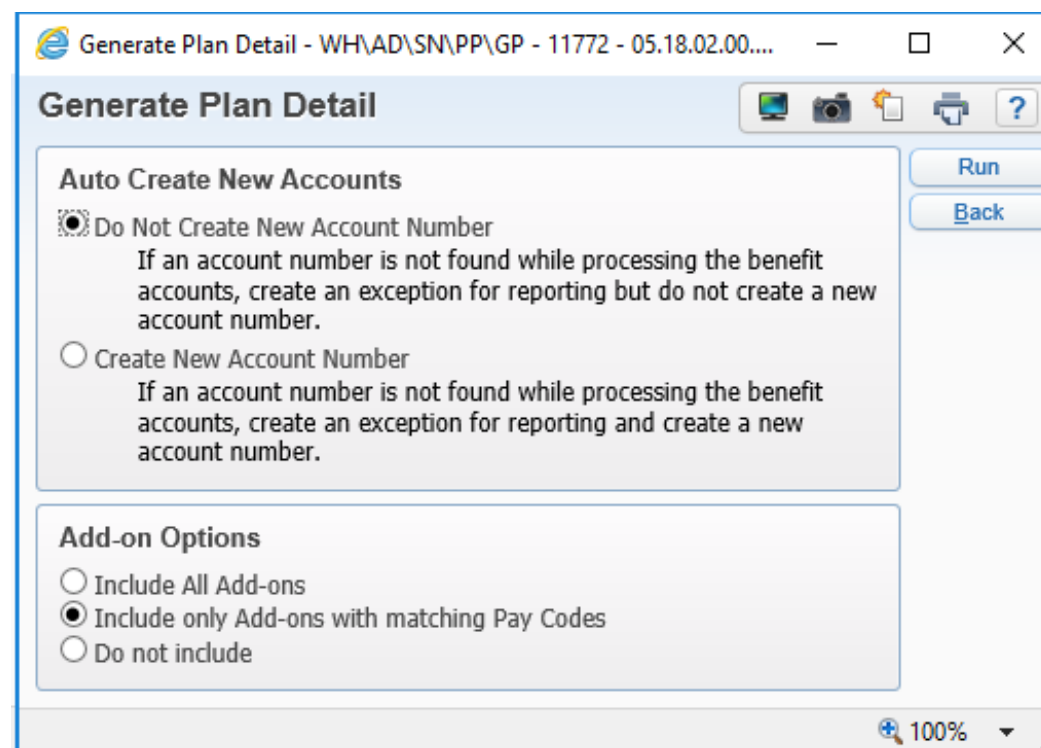
* Assignment Start Date Range: to * Assignment End Date Range: to

* Paid Start Date Range: to * Paid End Date Range: to

* [Selection Parameters:](#) Default Parameters

Asterisk (*) denotes a required field

Generate Plan Detail



Generate Plan Detail - WH\AD\SN\PP\GP - 11772 - 05.18.02.00....

Generate Plan Detail

Auto Create New Accounts

Do Not Create New Account Number
If an account number is not found while processing the benefit accounts, create an exception for reporting but do not create a new account number.

Create New Account Number
If an account number is not found while processing the benefit accounts, create an exception for reporting and create a new account number.

Add-on Options

Include All Add-ons
 Include only Add-ons with matching Pay Codes
 Do not include

Run
Back

100%

Pay – Benefit Distribution Report

Pay-Benefit Distribution Report - WH\AD\SN\RE\PD\PB - 10769 - 05.18.02.0...

Pay-Benefit Distribution Report

Template Settings

* Template Description:

Share with other users in the district

Print Greenbar

Report Type: Pay Distribution Benefit Distribution

Print Summary Version of Report

Do Not Print Social Security Numbers

Employee Selection Parameters

* [Selection Parameters](#):

Asterisk (*) denotes a required field





Save
Save and Print
Back

100%

Detail Report

Detail Report - WH\AD\SN\RE\PD\DR - 10767 - 05.18.02.00.11 - Inter... — □ ×

Detail Report

Template Settings

* Template Description:

Share with other users in the district

Print Greenbar

[Save](#)

[Save and Print](#)

[Back](#)

Select Parameters for Report

* [Selection Parameters](#):

Additional Report Options

Create an Excel file of vital data from the report after the report has printed.

Page Break By Employee.

Asterisk (*) denotes a required field

100%

Summary Report

Summary Report - WH\AD\SN\RE\PD\SR - 10771 - 05.18.02.00.11 ...

Summary Report

Template Settings

* Template Description:

Share with other users in the district

Print Greenbar

Select Parameters for Report

* Selection Parameters:

Additional Report Options

Print Benefit Detail Print Individual Assignments

Print Title Page Include Hourly Rate (Per Hr) on report






Asterisk (*) denotes a required field

100%

Plan Comparison Report

Plan Comparison Report - WH\AD\SN\RE\PD\CR - 10766 - 05.18.02.00.11 - Internet...

Plan Comparison Report

Template Settings

* Template Description:

Share with other users in the district

Print Greenbar

[Save](#)

[Save and Print](#)

[Back](#)

Compare these plans

* Plan 1: 2018-2019 Base Plan ▼ Report will compare the data in plan 2017-2018 Base Plan with the data in plan 2018-2019 Base Plan.

Plan 2: 2017-2018 Base Plan ▼

Do Not Report

Plan 3: Do Not Report ▼

Do Not Report


Print plan description over multiple lines.

Sort benefits by benefit code.

Print Individual Assignments

Page Break By Employee

Asterisk (*) denotes a required field

 100% ▼

Employee Cost by Account Report

Employee Cost by Account Report - WH\AD\SN\RE\PD\EC - 10768 - 05.18.02.00.11 - Internet Explorer

Employee Cost by Account Report

Template Settings

* Template Description:

Share with other users in the district
 Print Greenbar

Report Information

This screen displays Benefit codes used to create the Employee Cost by Account Report.
 The first columns of the report and the last 2 columns are pre-defined as follows:
 Name Key, Last Name, First Name, Employee Type, Assignment Building, Pay Code, Account Number,
 Account Percentage, Calculated Contract Amount and Total by Account.

Name:

* Selection Parameters:

User-Defined Benefit Group Headings

Group 1: Group 2: Group 3: Group 4: Group 5:

Group 6: Group 7: Group 8: Group 9: Group 10:

Group 11: Group 12: Group 13: Group 14: Group 15:

Benefit Information

Each Benefit Code must be put into a Group that was created above. To do this select a benefit code from the browse then choose a corresponding group from the combo box. The Clone button can be used to bring in benefit groups which have already been created in other plans.

Code	Description	Group	Type	Column
0ERP	EMPLOYER PD	Other		Health
0MC	MEDICARE	Tax	Medicare	Federal
0PST	DEF COMP 457	TSA		Retire
0SS	FICA	Tax	FICA	Federal
0TC	TRS INS CT	Retire		
0TCS	CARE SURCH	Retire		
0TPS	PENSION SURCH	Retire		
1TR	Stat Min & Fed	Sys	Sys Calc TRS Matching	

16 records displayed



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THANK YOU FOR ATTENDING!

