



Texas Skyward User Group Conference

# Salary Negotiations Budgeting Scenarios and Reporting Kim Robinson



# SN Budgeting Scenarios and Reporting



This session demonstrates setting up and comparing different budgeting scenarios to generate the finalized plan detail along with options for reporting.

- Enter session agenda bullet points
- Run Assignment Audit and Generate Plan Detail
- Creating Different Budgeting Scenarios
- Generate Various Reports





## Create a new plan by Importing Assignments from a Salary Negotiation Plan

### Import Assignment from Sal Neg Plans

#### Available Plans for Import

Select	Plan Description	Year
<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 type="checkbox"/>	2017-2018 Working Plan KR	2017
<input type="checkbox"/>	2018-2019 Base Plan	2018
<input type="checkbox"/>	2018-2019 Working Plan LK	2018
<input checked="" type="checkbox"/>	2019-2020 Working Budgeting Sc	2019

24 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:

None selected

0 of 63 records selected

#### 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:

Asterisk (\*) denotes a required field

## Generate the Pay – Benefit Distribution Report.

Pay-Benefit Distribution Report - WH\AD\SN\RE\PD\PB - 10769 - 05.19.06.00...

Not secure | <https://pbroker1/scripts11/cgiip.exe/WService=30477web/hemmgedit...>

### 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

Generate the Detail Report.

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Detail Report - WH\AD\SN\RE\PD\DR - 10767 - 05.19.06.00.03 - Google Chro...
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▲ Not secure | <https://pbroker1/scripts11/cgiip.exe/WService=30477web/hemmgedit...>

### Detail Report

**Template Settings**

\* Template Description:

Share with other users in the district

Print Greenbar

**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

Save

Save and Print




Back

Plan Comparison Report can be run to compare the plans selected.

Plan Comparison Report - WH\AD\SN\RE\PD\CR - 10766 - 05.19.06.00.03 - Google Chrome

Not secure | https://pbroker1/scripts11/cgiip.exe/WService=30477/web/hemmgedit071.w?isPopup=...

### Plan Comparison Report

#### Template Settings

\* Template Description:

Share with other users in the district

Print Greenbar

#### Compare these plans

\* Plan 1:  Report will compare the data in plan 2019-2020 Working Budgeting Scenarios (KR) and 2019-2020 Working KR Part 2 with the data in plan 2018-2019 Working Plan LK.

Plan 2:   Do Not Report

Plan 3:   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



The Employee Cost by Account Report allows you to verify the assignment data generating from the Plan.

Employee Cost by Account Report - WH\AD\SN\RE\PD\EC - 10768 - 05.19.06.00.03 - Google Chrome

Not secure | https://pbroker1/scripts11/cgiip.exe/WService=30477/web/hemmgedit076.w?isPopup=true

### 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.

**Benefit Codes**

Code	Description	Group	Type	Column
0ERPD	EMPLOYER PD	Other		HEALTH
0MC	MEDICARE	Tax	Medicare	TAX
0PST2	DEF COMP 457	TSA		DEF COMP
0SS	FICA	Tax	FICA	TAX
0TC	TRS INS CT	Retire		TRS
0TCS	CARE SURCH	Retire		TRS SRCHG
0TPS	PENSION SURCH	Retire		TRS SRCHG
1TR	Stat Min & Fed	Sys	Sys Calc TRS Matching	STAT MIN




16 records displayed      Code:

The Employee Management Report can be used to allow the Finance group verify the payroll account distribution codes.

Employee Management Reports - WH\AD\SN\RE\PR\EM - 10774 - 05.19.06.00.03 - Google Chrome

Not secure | <https://pbroker1/scripts11/cgiip.exe/WService=30477web/hemmgedit117.w?isPopup=true>

### Employee Management Reports

#### Template Settings

\* Template Description: **Employee Management Report**

Share with other users in the district

Print Greenbar

Save

Save and Print

Back

#### Report Parameters

Report: **Employee Management Acct Report**

Heading: **Employee Management Report**

Separate line for each distribution

Include All Add-ons

Include only Add-ons with matching Pay Codes

Do not include Add-ons

\* Selection Parameters: **Default Parameters**

#### Date Ranges

	Start	End
Start Date:	<input type="text"/>	<input type="text" value="12/31/9999"/>
End Date:	<input type="text"/>	<input type="text" value="12/31/9999"/>
Export Date:	<input type="text"/>	<input type="text" value="12/31/9999"/>
Update Date:	<input type="text"/>	<input type="text" value="12/31/9999"/>

#### Sort Options

Sort Field 1: **Last Name** Sort Field 2: **No Sort**

Asterisk (\*) denotes a required field





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**THANK YOU FOR ATTENDING!**

