CPM Quick Reference – Basics for Staffing and Salary Planning - Hourly

Reminders:

- Click off cells to save – see the , save often
- To refresh grid, click on grid to activate it and then click refresh
- Check your Dimension Selectors –
    - Verify that all grids that reference Fiscal Year are on the Fiscal Year you are working on.
    - Verify that all grids you are entering using the Working Plan Scenario.
- Copy/Paste in Grids - to copy to other rows, use Ctrl+C and Ctrl+V and allow the web application to access your clipboard.

Scan Unassigned Employee Grid

- **Filter by HR Org**
    - See if you have staff listed from your Division or program who have no time planned against any account key.
- **Verify "Unassigned Employees" for your group**
    - Should the employee have planned time? Some casual or emeritus employees may not; a new employee who has not had keys assigned should.
    - Are employees who should have assigned keys listed on your Employee Salary Planning and Employee Assumption Grids?
    - Add employees and their assigned keys to the Allocation Grid per the Employee Account Allocation Process below.

Examine Plan Employee Salaries Grid

- **Check all Actual Position/Term End Dates prior to the End of the Planning Year**
    - For any Term Employees, change PLANNING Position End Dates for those positions that are PLANNED to extend beyond their current HRIS term end date. (The HRIS Term date in the grid is the official term date and can only be modified through HR.)
- **Use Add Row Copy for new lines for any planned promotions or reclassifications**
    - Change in the new line - Position Start Date, Salary, Position Code (Job Title)
    - Change the end date of the old position, to be one day prior to start of the new position
- **Use Add Row Copy for new lines for any planned FTE Changes**
    - Change in the new line - FTE, Position Start Date, Position End Date
    - Change the end date of the original FTE to be one day prior to start of the new FTE
    - Add another line and edit as above if FTE changes again
- **Add Placeholder Employees for planned positions that are not yet in iVantage, i.e. new hires, planned hires…**
    - Create a Placeholder Employee Under "Tools" > "Employee Placeholders" > "Add"
    - **HINT** - Begin the Name/ Description with "PH" and your Div/Prog to easily identify this as a placeholder. For example - PH-ACD SW Eng
    - **HINT -** Enter annual salary - hourly will populate on saving
    - **NOTE** - This placeholder is automatically added to your Plan Employee Salaries grid
    - **NOTE** - This placeholder will need to manually be added to your Employee Assumptions grid for CSC charges and / or Work time Adjustment
    - **NOTE** - Placeholders should be used sparingly; they cannot be deleted but can be "recycled". See more on planning placeholders at the end of the document.

Examine Employee Assumptions Grid

- **Check CSC Listing**
    - Add all new placeholder employees to the CSC grid via Add Row Copy

- **HINT** - Use the drop down filter to view CSC assignments of your staff outside your division.
- **NOTE** - CSC Division is updated nightly from the IFAS Dashboard CSC assignment application. NEED TO VERIFY THIS IS THE CASE
- **NOTE** - Typically changes apply only to added placeholders or to future CSC Division changes for staff on your account keys. Future CSC changes should be done on new line number.

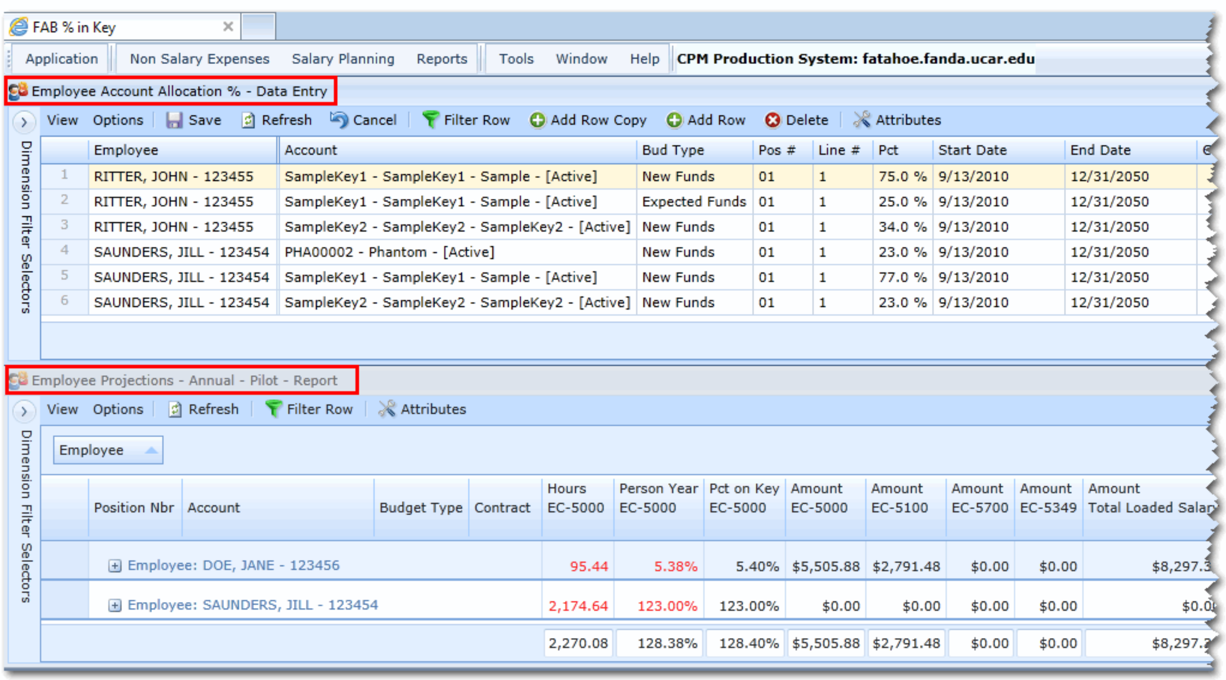
- **Work time Adjustments**
  - **NOTE** - The system defaults to the average 85% work time unless there is an adjustment on this grid. Typically you only need to change Work Time in a handful of cases.
  - Identify employees who vary enough from the 85% work time that there is value added in changing Work Time for planning purposes
  - If you do need to change someone, change the work time and the applicable dates of that change.

Create a Generic Placeholder Account Key

- Create a generic TBD placeholder account key for your group to use for planning assignments where the funding or project is really unknown at this point and there is not a proposal placeholder key.
  - **HINT** - Begin the Name/ Description with "PH" and your Div/Prog to easily identify this as a placeholder and for easy identification, you might include “TBD” or something similar. For example - "PH-MMM Key TBD"

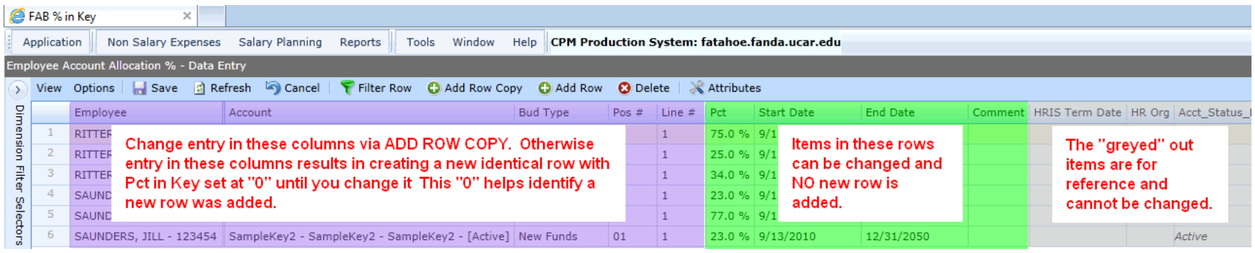
View Employee Account Allocation and Employee Projection Annual Report Grids

- **(Select "Tile Horizontal" with all other grids closed)**
  - **HINT -** On the Projection Report, which is grouped by employee by default, right click the Employee column header and click "**Ungroup**" to be able to filter to have access to the Filter Row.

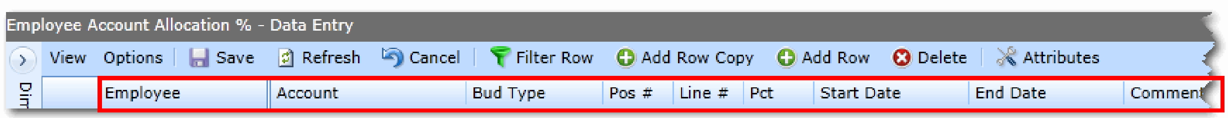


Enter / Edit in the Employee Account Allocation Grid

- **HINT** - to plan for a specific employee or account key, it is easiest to **use Filter Row** on both grids to limit the view to the relevant data, i.e., the employee's last name.
- **HINT** - The UI grids Differ from Excel - **Use "Add Row Copy" to change entries** for Employee Name, Account, Budget Type and Line # and if no longer necessary, delete the old row. (Changing these items in the cell actually creates a new record and new row.) Percent, Start Date and End Date can be edited directly; no new record is created
- **NOTE** - Budget Type for salaries defaults to "New Funds", so this needs to be changed if another budget type is needed. Typically "Expected Funds" is used for TBD and placeholder keys.



- **Select an Employee via Filter Row on each grid and make necessary changes to planned account key assignments.** (It's much easier to make and verify changes looking at just one person at a time in each Grid.)
  - To change a record or add a new record – select a row and press ADD ROW COPY top obtain a new row to edit.
  - Within the new Row you can make the necessary changes as follows:



  - **Change Employee Name Field** – use Filter Row to filter by the name of the person you are working on, to add a new employee to the grid, use add row copy, begin typing the new last name and select from the drop down box that appears.
  - **Change Account Key Field** - begin typing the account key and select from the drop down box that appears
  - **Change Budget Type Field** – defaults to "New Funds", this needs to be changed if another budget type is needed. The drop down arrow provides a list of types from which to select. Typically the budget type would be "New Funds" and typically "Expected Funds" is used for TBD and placeholder keys. **This entry is most critical for budget uploads.**
  - **Position # Field** - typically this is "1" except for a few employees who have two or more distinctly different appointments, job titles and associated salaries.
  - **Line # Field** - The system requires a line # for each new entry. Use #1 for the first entry for a person on an account key, use #2 for second entry on the same key for the same person and so on…. WARNING - If you accidently put #1 for both entries, the system defaults to the assignment with most recent dates and you will lose the other entry.)
  - **Start Date Field** – enter the date the person is planned to begin working on the project.
  - **End Date Field** – enter the dates the person is planned to stop working in the project. Do not use the "12/31/2050" default of iVantage; using the award end date helps you identify potential gaps in funding / coverage much more easily.
  - **Comment Field** – this allows the user to add notes for themselves and others who work with their group in the UI.
  - **NOTE** - You can add any UCAR employee to your keys and salary plan, but you cannot put employees on keys outside your Lab / Program. Assignments on others keys need to be coordinated with the administrator within that Lab/Program.

- **NOTE** - For unfunded or unknown portions of an employee's time, use the TBD placeholder account key with Budget Type "Expected Funds"

- **View the Employee Projection Annual Report Grid to check that the overall Percent in Key is 100% or equivalent to FTE.**
  - Verify that Group by Employee is OFF
  - Verify that you have selected the employee via filter row that you changed or added to the Employee Allocation Grid
  - Click on the Report Grid to activate it and press REFRESH to see the changes
- **Check POP End dates in Report, make adjustments to account key end dates in allocation grid as needed to match POP end dates.**
  - **HINT -** Generally you expect to see 100% on key and the person year to match the actual FTE.
- **After completing these steps for all employees, review the Employee Projections Report Grid.**
  - Take the filter off to see all employees
  - Regroup the Report by Employee, moving the Employee Attribute to the Group Panel; verify total person year and percent in key totals. Anything less than 100% will show up in red.
  - Check possible issues, errors in Person Year and Percent in Key columns.
  - **HINT** – Again, generally you expect to see 100% on key and the person year to match the actual FTE.

Items you may need for reference when planning employee salaries

- **List of all account keys with Proposal #, Acct Manager, Contract ID, Fund Source, Acct Description**
- **Internal list of all pending proposals with Status, Fund Source, PI, Planned Start Date**
- **List of all accounts with current funds available and forecast funds available**
- **List of all contracts and end dates (ART Report under Contracts - Direct Awards With Associated Account Keys By Div.rpt)**
- **Any other materials you use in planning where folks may be allocated over the next fiscal year**

Placeholder Tips and Tricks

- **Any fields you create in Placeholder can be edited.**
  - **HINT -** When editing a placeholder employee, keep only annual or hourly salary, but not both to prevent an error message.
  - **HINT -** Begin all Placeholder Names, both Employees and Accounts with PH-DIV for easy identification.
  - **HINT -** For any placeholder associated with a proposal, put the proposal number in the name. This help with recycling it - it's easier to determine that this person or award it now active.
  - **HINT -** Placeholder keys may take a few minutes to become available to add to grids.

Work time/ Available Hours to Work Calculation

- TM1 uses a formula like Excel's Networkdays function; it recognizes where weekends fall and counts actual available week days / work days, which is more is more accurate than what we've been doing.

	A	B	C	D	E	F	G	H	I	J	K	L
1	**Calculating Possible Working Days - before Holidays or Work Time for FY2013**											
2												
3	**General Method**						**TM1 Method**					
4	Simple Calculation						Looks specifically at a given year & the actual number of week days available					
5	Weeks in a Year		52				Begin Date		01-Oct-12			
6	Days in a Week		5				End Date		30-Sep-13			
7	TOTAL Number of Days		260	(Add a day for leap year.)			Total Week Days		261	Formula =NETWORKDAYS(C14,C15)		
9	Hours in a Day		8				Hours in a Day		8			
10	TOTAL WORK HOURS		**2080**				TOTAL WORK HOURS		**2088**			