Example 1 – Contract Salary with a Salary Schedule:

- Create a Current and Next Salary Schedule in Negotiations
  - On the Earning Schedule screen (Under Data Entry) in Negotiations:
    - Select the Bargaining Unit (This pulls from the Bargaining Unit table in Human Resources which must be associated to any Employee Types that are a part of it)
    - Group Code = Make this something meaningful such as TCHR CON
    - Matrix Description = Try to get the Emptypes in here; it helps once you have several schedules on the same screen!
    - Matrix Type = Contractual
    - Earncode=Contract (Only Choice for Contractual matrices)
    - Start/End Date for Current = 07/01/00 – 06/30/01
    - Start/End Date for Next = 07/01/01 – 06/30/02
    - Display Format = Dollars if you want it to display/enter the matrix amounts in dollars only, or Cents if you want both dollars & cents on the schedule
    - Prorate = No for everyone except Niskayuna Teachers Contract
    - Step Increment = Full Year
    - Levels and Step = Depends upon the format of your Schedule.
      Note – The Control# that is assigned when you save the schedule has to be attached to the Employee Type in Payroll Maintenance!

- On each Employee Type Screen in Payroll Maintenance:
  - Make sure the Bargaining Unit on the Employee Type matches the one you referenced on the Salary Schedule.
  - Select the Schedule Tab, Add the Salary Schedules' Control #s created in Negotiations for Current and Next Years (you can use the lookup button or type it)
  - Matrix Type = Contractual
  - Earncode = This should fill in with Contract

- On the Earnings Projections Screen (Under Data Entry) in Negotiations:
  - Use the pull down list to select the Bargaining Unit you want to work on – it should then display all the associated Employee Types. You can project them one at a time or pick them by highlighting certain ones (Ctrl + Left Mouse Click)
  - The first time you work on a bargaining group, or if you want to discard a projection that isn't what you expected, use the Clear All button.
  - Press the Generate button, which will bring up a window selection of Earning Types and Generate Options.
    - In this example, only our Contract $ are on a Schedule (let's start simple..), so just keep the check mark on Contractual (deselect any other earnings by clicking on them and the check mark will disappear),
    - Step Increase – Click on Automatically (a dot will appear)
    - Increase # Steps = 1 Step
    - Effective Date = 07/01/01
    - Round = Dollars if you want it rounded to the nearest dollar (10,532.00)
      Or = Cents if you want it to compute the cents (10,532.05) – You would use cents if your schedule was set up with Cents or if you were processing a Schedule that had hourly rates that would be Annualized into a Contract and you wanted Cents.
    - SAVE – Actually does the Projection for you!!!!

Note: Only earnings marked as Renewable will be projected!

- Projections can be reviewed 2 ways :
  - Select the Modify button within Earnings Projections
    - You can look @ Employees sorted by Emp#, Name, Type, or Earning Code by clicking on the heading of the appropriate column.
    - The Employee and Earning displayed in the window on the right is determined by the line you have highlighted.
    - The Salary button at the top of the screen will allow you to modify the Projected data for the selected employee as follows:
      - You can manually change the Step if you need to; however, the system will not look up the Base salary from the schedule yet; you must key it.
      - Tabbing down through the screen will update/calculate any fields as needed. If you change the FTE%, it will recalculate the FTE$.
      - Days and Checks are defaulting from the employee's appointment for a full year. You can change them here if you wish.
      - Period Pay will calculate based upon FTE$ \ Checks.
    - You can also review Projection Data with the Negotiations Reports – Earnings Projection Report.

- When you are checked and ready to Move to Payroll:
  - **IMPORTANT – You must be sure that the Payroll Parameters Screen – Check Date is greater than July 1, 2001**
  - **If you do not have the Date set up properly, the system will transfer your salaries, but it will not recalculate the Account Distribution screen!!!**

- Process the Move to Payroll in the Earnings Projections screen in Negotiations:
  - Use the pull down list to select the Bargaining Unit you want – it should then display all the associated Employee Types. You can do them one at a time or pick them by highlighting certain ones (Ctrl + Left Mouse Click)
  (Note – The system allows you to work on multiple employee types at one time, which is why you have to re-select them when you return!)
  - Press the Move button to initiate the move process. You will receive a warning message related to the fiscal year. Click OK to continue the process.
  - The result of this process will move the data to Payroll as follows:
    - The Appointment screen will update End Date to 06/30/02
    - The Earning screen will update Start/End dates to 07/01/01 & 06/30/02 as well as updating the numbers as listed in the Projection Screen.
    - The Account Distribution screen will recalculate based upon the new dollar amounts.

Example 2 – Contract Salary with a Salary Schedule and Other Earnings without Schedules:

▪ Follow all the same steps as in Example 1 to Project the Contract $ piece but do not process the Move to Payroll step. We recommend that you project the Other earnings as a separate projection step because you usually do not have Steps associated with these flat dollar amounts of money and the contract projection increments the Step. This means that in order to move all components of a salary over in one step, other earnings must be projected and verified prior to moving.

▪ Once you have projected the Contract $ follow these steps to bring over all the Other Earnings that were checked as Renewable in the old year into Projections:
  ▪ On the Earnings Projections Screen (Under Data Entry) in Negotiations:
    ▪ Use the pull down list to select the Bargaining Unit you want – it should then display all the associated Employee Types. You can select them one at a time or pick them by highlighting certain ones (Ctrl + Left Mouse Click)
    ▪ Do not use Clear this time – or you will lose any Contract $ you just finished projecting!
    ▪ Press the Generate Button, which will bring up a window selection of Earning Types and Generate Options.
      ▪ This time, only select the Supplemental earning Type. If Contractual has a check mark, remove it by clicking on it!
      ▪ Step Increase – Click on Automatically (a dot will appear)
      ▪ Increase # Steps = 0 (flat $ amounts should not have a step)
      ▪ Effective Date = 07/01/01
      ▪ Round = Dollars if you want it rounded to the nearest dollar (250.00) Or = Cents if you want it to keep the cents (249.99)
      ▪ Click on the Box that indicates "Show all Earncodes". This will display the entire list of Payroll Earning Codes.
      ▪ If you do not know which earning codes you have used in Other Earnings or Supplemental Appointments that are being renewed into the new fiscal year, simply highlight the entire list (By holding down the Shift key as you left mouse click on the first and last entry in the list, the entire list can be chosen). Otherwise, hold the CTRL key down while left clicking on each code you would like to choose.
      ▪ SAVE – Actually pulls a copy of those items that had a Renewable check mark on them from Other Earnings and Supplemental Appointments into the Earnings Projections.

▪ Now when you select Modify, you should see the Employee's Contract $ and each of their Other Earnings $. As with the contract $, you can modify the Projected Salary before Moving to Payroll.

Example 3 – Other Earnings with Schedules:

- Create a Current and Next Salary Schedule in Negotiations for each Earning Code that has a Schedule.
  - On the Earning Schedule screen (under Data Entry) in Negotiations:
    - Select the Bargaining Unit from the Employee Type (This pulls from the Bargaining Unit table in Human Resources which must be associated to any Employee Types that are a part of it)
    - Group Code = Make this something meaningful such as TCH LONG
    - Matrix Description = Try to get the Emptypes in here; it helps once you have several schedules on the same screen!
    - Matrix Type = Supplemental
    - Earncode = The Earning Code for this Schedule from the list.
    - Start/End Date for Current Schedule = 07/01/00 – 06/30/01
    - Start/End Date for Next Schedule = 07/01/01 = 06/30/02
    - Display Format = Dollars if you want it to display/enter the matrix amounts in dollars only, or Cents if you want both dollars & cents on the schedule
    - Prorate = No on Other Earnings
    - Step Increment = Full Year
    - Levels and Step = Depends upon the format of your Schedule
      Note – The Control# that is assigned when you save the schedule has to be attached to the Employee Type in Payroll Maintenance!

- On each Employee Type Screen in Payroll Maintenance:
  - Make sure the Bargaining Unit on the Employee Type matches the one you referenced on the applicable Salary Schedule.
  - Select the Schedule Tab, Add the Salary Schedules' Control #s created in Negotiations for Current and Next Years (you can use the lookup button or type it)
  - Matrix Type = Supplemental
  - Earncode = This should fill in with the Earning Code that you established on the Schedule in Negotiations.

- On the Earning Code Maintenance in Payroll:
  - Verify or Update the Earning Method field as follows:
    - Standard – For all earnings other than Credit Hours and Differential
    - Credit Hours – For all Other earnings that use Credits with a rate in a Schedule.
    - Differential – For all Differential earnings.

- On the Earnings Projections Screen in Negotiations:
  - Use the pull down list to select the Bargaining Unit you want to work on – it should then display all the associated Employee Types. You can do them one at a time or pick them by highlighting certain ones (Ctrl + Left Mouse Click)
  - The first time you work on a bargaining unit & employee type, or if you want to discard a projection that isn't what you expected, use the Clear All button. Please remember that if you had already projected Contract earnings, clearing will erase it. Make sure you really want to clear if you choose that button!
  - Press the Generate button, which will bring up a window selection of Earning Types and Generate Options.

- In this example, only our Supplemental $ are being projected (we'll assume that you already projected Contract $), so keep the check mark on the Supplemental earning type.
- Step Increase – Click on Automatically (a dot will appear)
- Increase # Steps = 1 Step if your schedule has Steps or 0 Step if it only has 1 step.
- Effective Date = 07/01/01
- Round = Dollars if you want it rounded to the nearest dollar (500.00) Or = Cents if you want it to compute the cents (350.49)
- The Earning Codes associated with Schedules for the Employee Type will display in a window. Highlight the codes that you wish to have included in this projection by holding the CTRL key down while left clicking on each code you would like to choose.
- SAVE – Actually does the Projection for you !!!!
  Note: Only earnings marked as Renewable will be projected!

- When you select the Modify button, you should see the Employee's Other Earnings. If you have already processed their Contract $ projection, you will see each piece of their salary.

- You can also review Projection Data with the Negotiations Reports – Earnings Projection Report. This report is nice because you can view Contract and Other Earnings $ all together by each employee.