



Running Query and Viewing Existing Data

Before making changes to your Salary Administration Plans, you will need to run a query that extracts the current data from your district's existing Salary Administration Plans and Steps. You can then review your current data and identify exactly what changes you plan to make.

Navigation: Main Menu > Reporting Tools > Query > Query Viewer

1. Navigate to **Main Menu > Reporting Tools > Query > Query Viewer**
2. Run query titled **M_HR_SALARY_SCHED_UPDATE**
3. Use the prompts to query the data from a specific Salary Plan and/or Salary Grade or use the wildcard (%) to view all data from that data set.

IMPORTANT: The **Increase %** option is a tool that calculates a Salary increase by percent. This should be left as the default value of "0" to bring in the current schedule.

M_HR_SALARY_SCHED_UPDATE - Used Salary Schedule Updts

Increase % (without decimal)

Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Desc	New Min/Annual	New Max/Ar
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Sample query results:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
09900	001	001	A	PERSONNEL COMMISSION	PERSONNEL	0.00	0.00	25.00	25.00	0.00	0.00	25.00	12	D	1	NAHRLY	H	25.00	0.0000000	1/1/1901	52000.00	52000.00	25.00	25.00	200.00	200.00	25.00
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	1	NAHRLY	H	13.34	0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	13.34
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	2	NAHRLY	H	16.00	0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	16.00
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	3	NAHRLY	H	22.67	0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	22.67
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	4	NAHRLY	H	26.67	0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	26.67
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	5	NAHRLY	H	33.34	0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	33.34

A Closer Look:

Columns A-S are the required columns for the upload

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Desc	New Min/Annual	New Max/Annual	New Min/Hourly	New Max/Hourly	New Min/Daily	New Max/Daily	Incrn Mths	Incr Type	Step	Code	Rate	Comp Freq	New Comp Rate
09900	001	001	A	PERSONNEL COMMISSION	PERSONNEL	0.00	0.00	25.00	25.00	0.00	0.00	25.00	12	D	1	NAHRLY	H	25.00	
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	1	NAHRLY	H	13.34	
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	2	NAHRLY	H	16.00	
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	3	NAHRLY	H	22.67	
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	4	NAHRLY	H	26.67	
09900	002	001	A	COACHES CLASSIFIED	COACHES CL	0.00	0.00	13.34	42.67	0.00	0.00	13.34	12	D	5	NAHRLY	H	33.34	

Columns T- AB will be used to calculate new rates. These columns will eventually need to be DELETED before uploading your new Salary Administration Updates to PeopleSoft

T	U	V	W	X	Y	Z	AA	AB
Increase decimal value	Eff Date	Min/Annual	Max/Annual	Min/Hrly	Max/Hrly	Min/Daily	Max/Daily	Comp Rate
0.0000000	1/1/1901	52000.00	52000.00	25.00	25.00	200.00	200.00	25.00
0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	13.34
0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	16.00
0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	22.67
0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	26.67
0.0000000	1/1/1901	27747.20	88753.60	13.34	42.67	106.72	341.36	33.34

IMPORTANT: If your update contains a Salary Admin Plan or Salary Grade that did not previously exist, please refer to the HR1 Salary Administration Guide for directions on how to manually add them as this cannot be done using this spreadsheet. Once you've manually added the Plan/Grade, you can then update it using this process.

Updating the Spreadsheet for Excel to CI Process

Once you've reviewed your current data and identified exactly what changes you plan to make. There are two options to ready the file with the new salary schedule values.

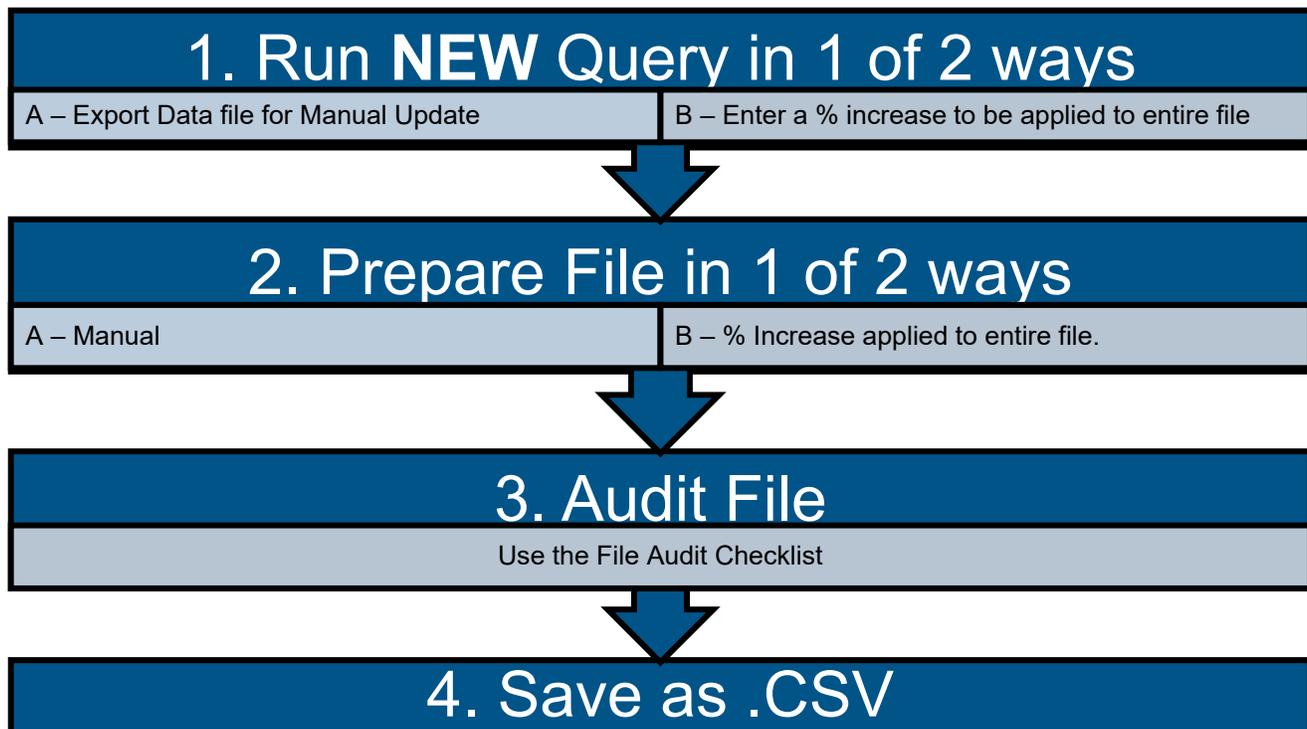
Option 1: Update spreadsheet MANUALLY.

- Update the schedule created above by manually entering the new values. This might be best if only a few grades or steps are being updated, or it's not a percent increase.

Option 2: Update spreadsheet using built in formula tool.

- This is only recommended if a percent increase is being implemented and if all Steps in the spreadsheet are affected.

Big Picture of File Preparation



Directions for manually updating spreadsheet for Excel to CI upload:

IMPORTANT!: Always run the entire process in the Sandbox first. Never run in production without having completed the process in a test environment first.

1. Navigate to **Main Menu > Reporting Tools > Query > Query Viewer**
2. Run query titled **M_HR_SALARY_SCHED_UPDATE**
3. Use the prompts to query the data from a specific Salary Plan and/or Salary Grade or use the wildcard (%) to view all data from that data set.

M_HR_SALARY_SCHED_UPDATE - Used Salary Schedule Updts

Set ID
 Sal Plan (%)
 Grade (%)
 Increase % (without decimal) **← Do not enter a value in the Increase % prompt when updating the spreadsheet manually.**

Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Desc	New Min/Annual	New Max/Annual	New Min/Hourly	New Max/Hourly	New Min/Daily	New Max/Daily	Incrm Mths	Incr Type	Step	Rate Code	Comp Freq	New C Rate
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4. Export the results to Excel.
5. The spreadsheet should only contain the Grades and Steps of the Salary Administration Plan(s) you are updating. **Delete the rows of the Salary Administration Plans that will not be updated.**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Desc	New Min/Annual	New Max/Annual	New Min/Hourly	New Max/Hourly	New Min/Daily	New Max/Dail	Incrm Mths	Incr Type	Step	Rate Code	Comp Freq	New Comp Rate
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	1	NAANNL	A	50244.00
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	2	NAANNL	A	52748.00
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	3	NAANNL	A	55261.00
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	4	NAANNL	A	57783.00
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	5	NAANNL	A	60298.00
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	6	NAANNL	A	62811.00
09900	060	001		A	TEACHERS	TEACHERS	50244.00	67862.00	0.00	0.00	0.00	0.00	12	D	7	NAANNL	A	65340.00

6. Column D (Eff Date): Enter the Effective Date of the changes you are making. This date is the date when these new rates will take effect. (e.g. format is 1/1/2019 or 10/01/2019.)
7. Columns H-M: Update the appropriate Minimum/ Maximum rates columns. The Minimum should be equal to Step 1 of the Compensation Rate and the Maximum should equal the last step of the Compensation Rate. In the example above, the Salary Plan is an ANNUAL plan so the Minimum and Maximum amounts are only entered in the New Min/ Annual and New Max/ Annual columns. The Daily and Hourly Minimum and Maximum amounts should be zeros. Therefore, this salary plan cannot be attached to Daily and Hourly jobs as they require a Daily or Hourly Salary Plan.
8. **Column S (New Comp Rate):** Enter the **New Compensation Rates** for the corresponding Salary Steps.
9. Delete all header rows and proceed to audit of spreadsheet for Excel to CI upload.

Directions for updating spreadsheet using built in formula tool:

IMPORTANT!: Always run the entire process in the Sandbox first. Never run in production without having completed the process in a test environment first.

1. Navigate to **Main Menu > Reporting Tools > Query > Query Viewer**
2. Run query titled **M_HR_SALARY_SCHED_UPDATE**
3. Use the prompts to query the data from a specific Salary Plan and/or Salary Grade or use the wildcard (%) to view all data from that data set.
4. In the Increase % (without decimal) field, enter the percent without a decimal. For example, a 2.1% increase is entered as 21.

M_HR_SALARY_SCHED_UPDATE - Used Salary Schedule Updts **EXAMPLE: Export File with % Increase Applied**

Set ID

Sal Plan (%)

Grade (%)

Increase % (without decimal) ←

Enter percent without a decimal. For example, a 2.1% increase is entered as 21.

5. Export to Excel.
6. Since only columns A-S are needed for the upload, *delete* all data in columns T-AB

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Descr	New Min/Annual	New Max/Annual	New Min/Hourly	New Max/Hourly	New Min/Daily	New Max/Daily	IncrM Mths	Incr Type	Step	Rate Code	Comp Freq	New Comp Rate	Increase decimal	Eff Date	Min/Annual	Max/Annual	Min/Hrly	Max/Hrly	Min/Daily	Max/Daily	Comp Rate
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	1	NAANNL A	51299.12	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	50244.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	2	NAANNL A	53855.70	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	52748.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	3	NAANNL A	56421.48	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	55261.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	4	NAANNL A	58996.44	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	57783.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	5	NAANNL A	61564.25	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	60298.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	6	NAANNL A	64130.03	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	62811.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	7	NAANNL A	66712.14	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	65340.00	
09900	060	001	A	TEACHERS	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	8	NAANNL A	69287.10	0.0210000	7/1/2018	50244.00	67862.00	24.16	32.63	193.25	261.01	67862.00	

7. **Column D (Eff Date):** Enter the Effective Date of the changes you are making. This date is the date when these new rates will take effect. (e.g. format is 1/1/2019 or 10/01/2019.)
8. **Columns H-M:** Update the appropriate Minimum/ Maximum rates columns. Verify that the new *Minimum/Maximum* values are correct. The Minimum should be equal to Step 1 and the Maximum should equal the last step of the Grade.
9. **Column S (New Comp Rate):** Verify that the rounding values are correct. There can only be 2 decimal places.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Descr	New Min/Annual	New Max/Annual	New Min/Hourly	New Max/Hourly	New Min/Daily	New Max/Daily	IncrM Mths	Incr Type	Step	Rate Code	Comp Freq	New Comp Rate
09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	1	NAANNL A		51299.12
09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	2	NAANNL A		53855.70
09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	3	NAANNL A		56421.48
09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	4	NAANNL A		58996.44
09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	5	NAANNL A		61564.25
09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	6	NAANNL A		64130.03

New Comp Rate: As reported by the District, value must not exceed 2 decimal points. **If needed**, Excel Fcn: =Round(Cell Ref,2) or =Round(Cell Ref,0). For example:

S	T	U
Comp Rate		
22243.2678	=ROUND(S2,0)	22243

10. Delete all header rows and proceed to audit of spreadsheet for Excel to CI upload.

AUDIT of Spreadsheet for Excel to CI Upload

- Is the Spreadsheet displaying only columns A-S?
- Is the Effective Date correct? *This must be the date that these updates take effect.*
- Did you enter the New Salary Minimums and Maximums correctly?
- Did you remove the formulas used to calculate the new values?
The spreadsheet should not contain any formulas.
- Did you format all values with leading zeroes to Text?
- Verify there are no commas in the description or short description.
- Steps that are not being updated still need to be included in the file, unless they are obsolete. (Validate all obsolete steps to be sure there are no job data records attached.)
- FINAL STEP! Once you've validated the spreadsheet against the table below, save the file as a CSV (Comma Delimited) (*.csv).**

Your final spreadsheet should be formatted as follows:

Column	Column Header	Data
A	Set ID	Five-digit ID (including leading zero) and is correct for District. Example: District 099 = 09900
B	Sal Plan	Includes leading zero(s), generally 3 digits
C	Grade	Includes leading zero(s), generally 3 digits
D	New Eff Date	mm/dd/yyyy districts will need to enter the effective date. You do not need leading zeros.
E	Status	"A"
F	Plan Descr	Verify that there are no "commas" in the description fields.
G	Short Desc	Verify that there are no "commas" in the description fields.
H	New Min/Annual	ANNUAL (salaried) Salary Plan ONLY: Minimum = <u>new Step 1 value within this Grade</u> . Columns J,K,L,M should be cleared out as they do not pertain to the Salary Plan you are updating.
I	New Max/Annual	ANNUAL (salaried) Salary Plan ONLY: Maximum = <u>highest step in this Grade</u> . Columns J,K,L,M should then be cleared out as they do not pertain to the Salary Plan you are updating.
J	New Min/Hour	HOURLY Salary Plan ONLY: Minimum = <u>new Step 1 value within this Grade</u> . Columns H,I,L,M should then be cleared out as they do not pertain to the Salary Plan you are updating.
K	New Max/Hour	HOURLY Salary Plan ONLY: Maximum = <u>highest step in this Grade</u> . Columns H,I,L,M should then be cleared out as they do not pertain to the Salary Plan you are updating.
L	New Min/Daily	DAILY Salary Plan ONLY: Minimum = <u>new Step 1 value within this Grade</u> . Columns H,I,J,K should then be cleared out as they do not pertain to the Salary Plan you are updating.
M	New Max/Daily	DAILY Salary Plan ONLY: Maximum = <u>highest step in this Grade</u> . Columns H,I,J,K should then be cleared out as they do not pertain to the Salary Plan you are updating.
N	Incrm Mths	'12' (this indicates months to next step increment)
O	Incr Type	ALWAYS 'D' (Date Based Incr)
P	Step	Insure there are no additional values like leading or ending zeros
Q	Rate Code	NAANNL, NAHRLY, DAILY
R	Comp Freq	NAANNL= A, NAHRLY =H, DAILY=D
S	New Comp Rate	As reported by the District, value must not exceed 2 decimal points. <i>If needed</i> , Excel Fcn: =Round(Cell Ref,2) or =Round(Cell Ref,0).