

How to Prepare your File for a Mass Salary Schedule Update

M_HR_SALARY_SCHED_UPDATE

Presented by SDCOE CRC | February 20, 2019

M_HR_SALARY_SCHED_UPDATE Big Picture of File Preparation

1. Run NEW Query in 1 of 2 ways

A – Export Data file for Manual Update

B – Enter a % increase to be applied to entire file

2. Prepare File in 1 of 2 ways

A – Manual

B – % Increase applied to entire file.

3. Audit File

Use the File Audit Checklist

4. Save as .CSV

M_HR_SALARY_SCHED_UPDATE

Step 1

1. Run NEW Query in 1 of 2 ways

A – Export Data file for Manual Update

B – Enter a % increase to be applied to entire file

Option A – This option would be best if you are updating only certain steps within a grade.

***EXAMPLE:** A Minimum Wage Increase will be going into effect. You need to update certain grades but only Step 1 on each grade is affected. Since the rest of the steps will remain the same, option A would work best for you.*

Option B – This option would be best if you are updating all steps within a grade by the same percent (%).

***EXAMPLE:** Your board approved a salary increase of 2.1% for all classified salaried employees. Since all steps within the affected grades will be updated, option B would work best for you.*

M_HR_SALARY_SCHED_UPDATE

1. Run NEW Query in 1 of 2 ways

A – Export Data file for Manual Update

Example, no % increase entered.

M_HR_SALARY_SCHED_UPDATE - Used Salary Schedule Updts

Set ID
 Sal Plan (%)
 Grade (%)
 Increase % (without decimal)
← **No Increase added**

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

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 Comp Rate
1	09900	001		A	PERSONNEL COMMISSION	PERSONNEL	0.00	0.00	25.00	25.00	0.00	0.00	12	D	1	NAHRLY	H	25.00

Example of Query Results without % increase entered in prompt.

Query pulls EXISTING data from salary schedule. Once exported to excel you will manually update the rates as needed.

M_HR_SALARY_SCHED_UPDATE

1. Run NEW Query in 1 of 2 ways

B – Enter a % increase to be applied to entire file

Example, a 2.1% increase would be entered as 21. A 3% increase would be entered as 3.

M_HR_SALARY_SCHED_UPDATE - Used Salary Schedule Updts

Set ID

Sal Plan (%)

Grade (%)

Increase % (without decimal) ← **2.1% Increase added**

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All

Example of Query Results with % increase entered in prompt.

Query auto updates MIN and MAX. It also updates each step by % entered in prompt.

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 Comp Rate
1	09900	001		A	PERSONNEL COMMISSION	PERSONNEL	0.00	0.00	25.52	25.52	0.00	0.00	12	D	1	NAHRLY	H	25.52

Initial Excel Export – delete unneeded columns and rows

- Delete row 1
- Delete columns T-AB

BEFORE

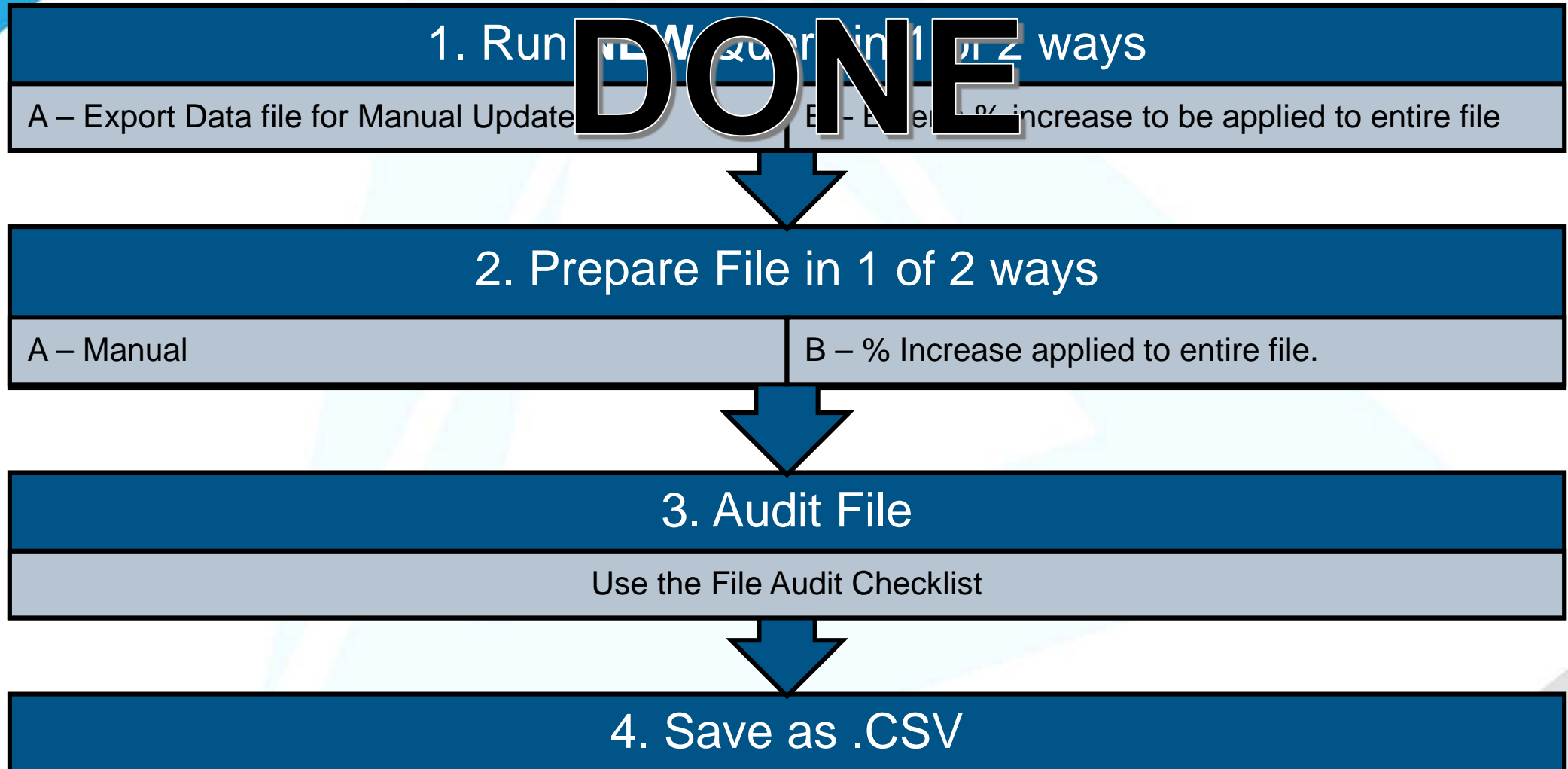
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Used Salary Schedule Updts																											
2	Set ID	Sal Plan	Grade	New Eff Date	Status	Plan Descr	Short Desc	New Min/Annual	New Max/Annual	New Min/Hourly	New Max/Hourly	New Min/Daily	New Max/Daily	Incrm Mths	Incr Type	Step	Rate Code	Comp Freq	New Comp Rate	Increase decimal value	Eff Date	Min/Annual	Max/Annual	Min/Hrly	Max/Hrly	Min/Daily	Max/Daily	Comp Rate
3	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	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	50244.00
4	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	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	52748.00
5	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	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	55261.00
6	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	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	57783.00
7	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	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	60298.00
8	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	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	62811.00
9	09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	7	NAANNL	A	66712.14	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	65340.00
10	09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	8	NAANNL	A	69287.10	0.0210000	#####	50244.00	67862.00	24.16	32.63	193.25	261.01	67862.00

AFTER

	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	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
	09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	7	NAANNL	A	66712.14
	09900	060	001		A	TEACHERS	TEACHERS	51299.12	69287.10	0.00	0.00	0.00	0.00	12	D	8	NAANNL	A	69287.10

M_HR_SALARY_SCHED_UPDATE

Big Picture of File Preparation



How to Prepare Your File

- Is the Spreadsheet displaying only columns A-S?**
- Is the Effective Date correct?** *This must be the date that these updates must 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 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).**

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.

Step 2

2. Prepare File in 1 of 2 ways

- A – Manual
- B – % Increase applied to entire file.

Option A (Manual) –

- **Delete the rows of the Salary Administration Plans that will not be updated.** The spreadsheet should only contain the Grades and Steps of the Salary Administration Plan(s) you are updating.
- **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.)
- **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 Grade.
- **Column S (New Comp Rate): Enter the New Compensation Rates for the corresponding Salary Steps.**

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

Step 2 Continued

2. Prepare File in 1 of 2 ways

A – Manual

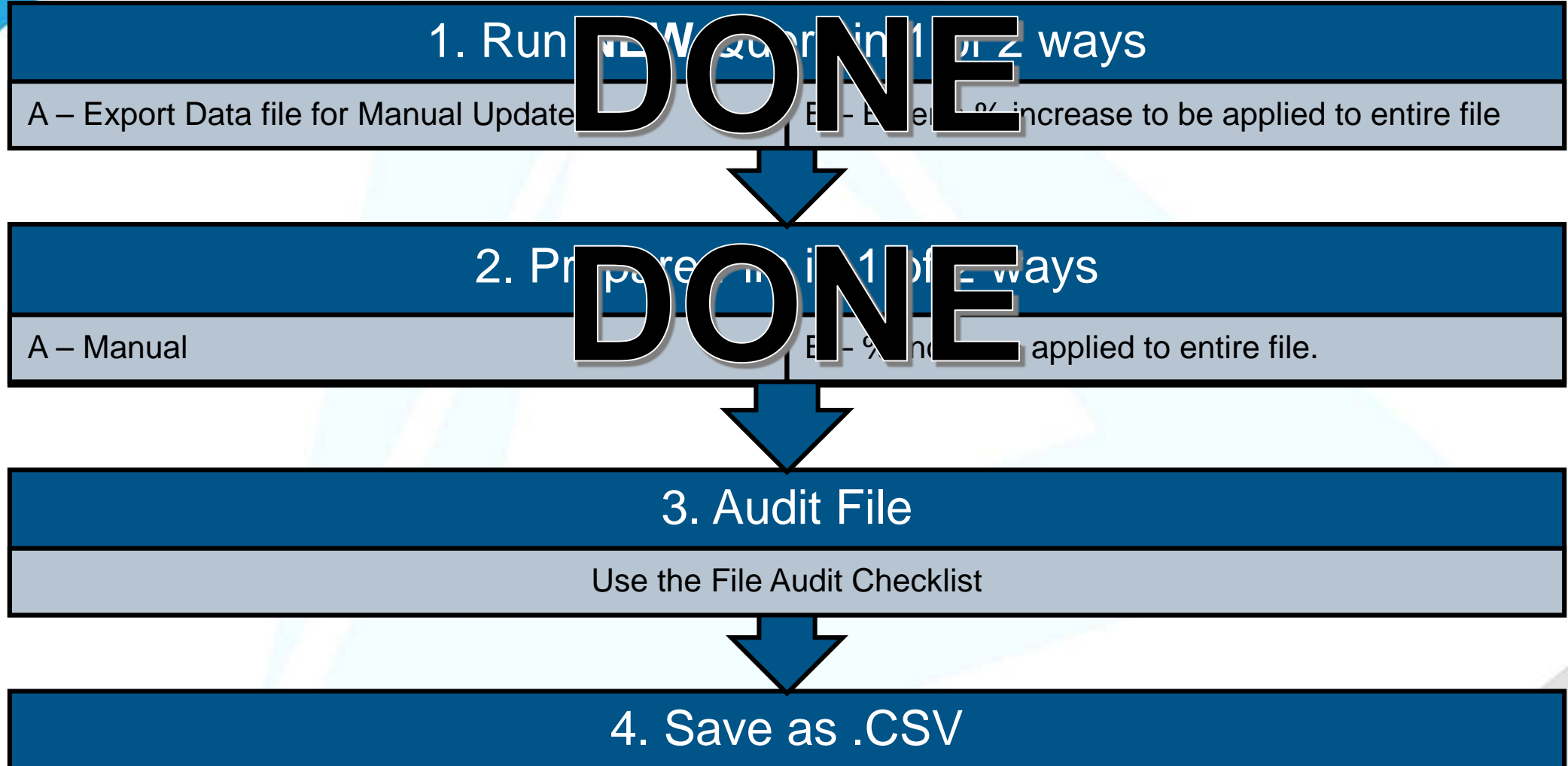
B – % Increase applied to entire file.

Option B (%) –

- **Delete the rows of the Salary Administration Plans that will not be updated.** The spreadsheet should only contain the Grades and Steps of the Salary Administration Plan(s) you are updating.
- **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.)
- **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.
- **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 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 Comp Rate
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	1	NAANNL	A	51500.10
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	2	NAANNL	A	54066.70
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	3	NAANNL	A	56642.52
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	4	NAANNL	A	59227.57
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	5	NAANNL	A	61805.45
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	6	NAANNL	A	64381.27
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	7	NAANNL	A	66973.50
09900	060	001		A	TEACHERS	TEACHERS	51500.10	69558.55	0.00	0.00	0.00	0.00	12	D	8	NAANNL	A	69558.55


M_HR_SALARY_SCHED_UPDATE Big Picture of File Preparation



Step 3

3. Audit File

Use the File Audit Checklist

 FUTURE WITHOUT BOUNDARIES™

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 must 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 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

Step 3

3. Audit File

Use the File Audit Checklist

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.

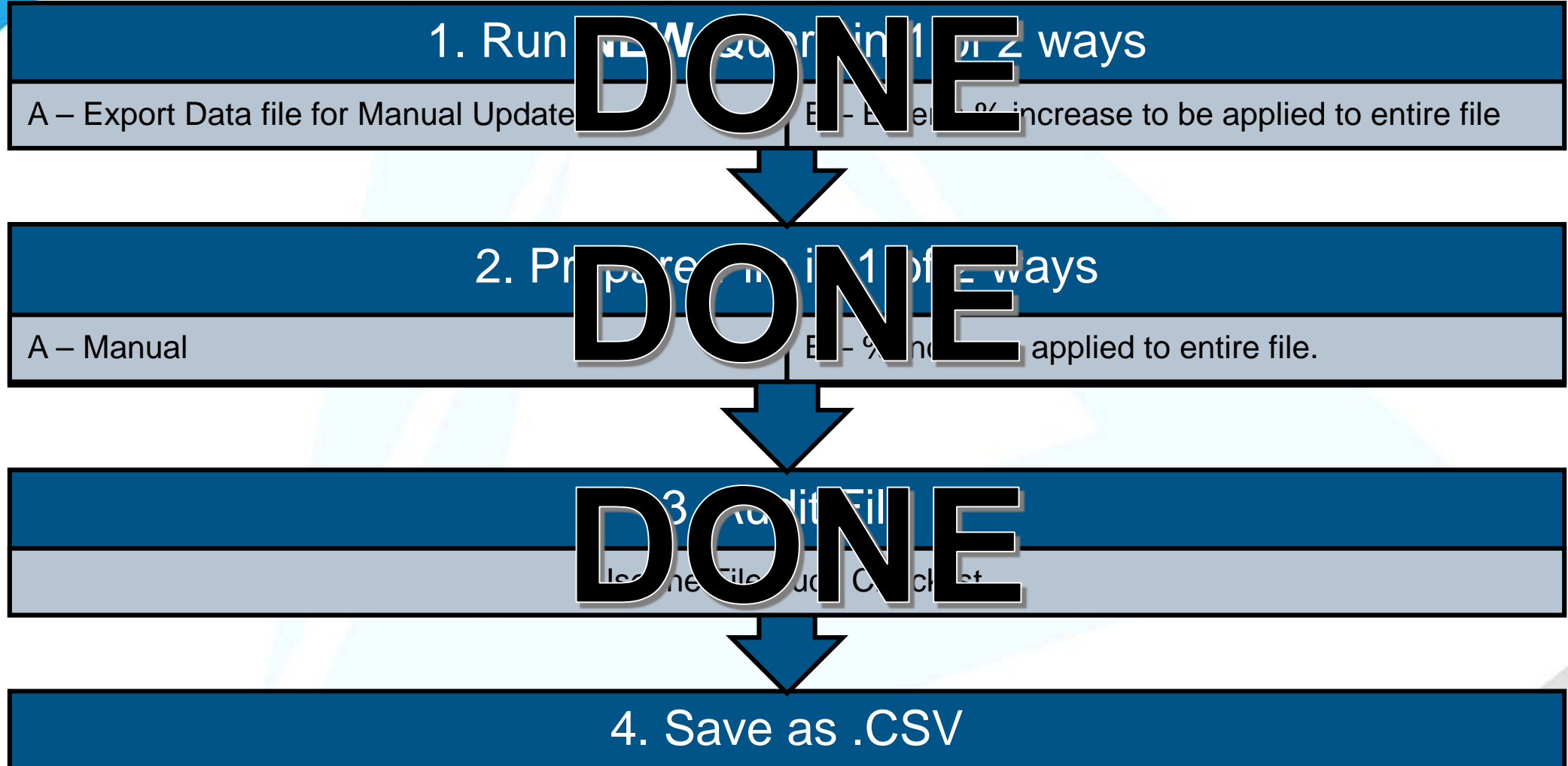
Step 3

3. Audit File

Use the File Audit Checklist

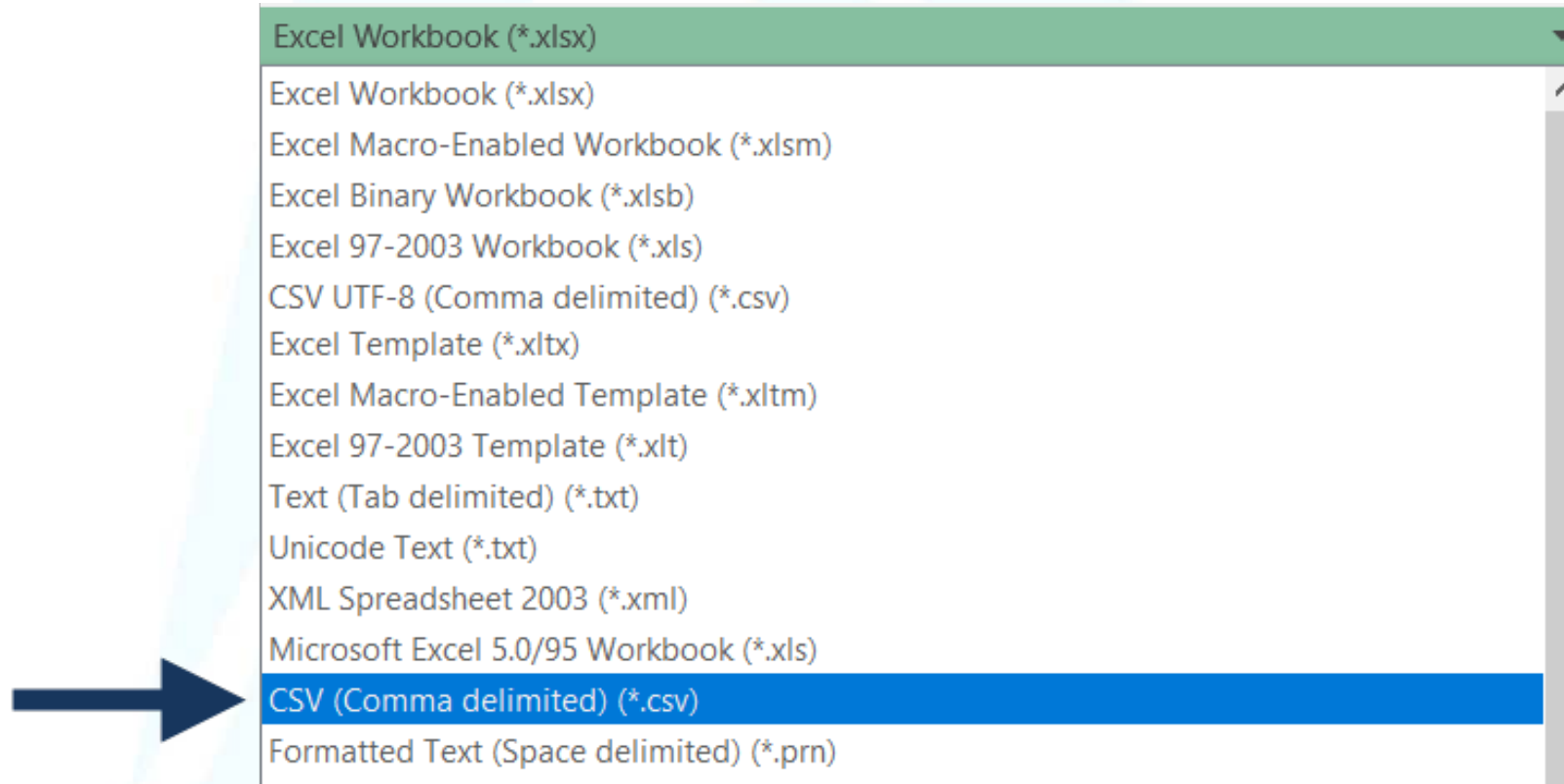
Column	Column Header	Data
J	New Min/Hour	HOURLY Salary Plan ONLY: Minimum = <u>new Step 1 value within this Grade</u> . Columns H,I,L,M should then be cleared out as they do not pertain to the Salary Plan you are updating.
K	New Max/Hour	HOURLY Salary Plan ONLY: Maximum = <u>highest step in this Grade</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).

M_HR_SALARY_SCHED_UPDATE Big Picture of File Preparation



Step 4

4. Save as .CSV



M_HR_SALARY_SCHED_UPDATE Big Picture of File Preparation

1. Run NEW Query in 1 of 2 ways

A – Export Data file for Manual Update

B – Enter a % increase to be applied to entire file

2. Prepare File in 1 of 2 ways

A – Manual

B – Enter % increase to be applied to entire file.

3. Audit File

Use the File Audit Checklist

4. Save as .CSV

DONE