

Labor Distributions

Human Resources Front End

How-To Guide

HR Front End Training Team

Labor Distributions

HR Front End

How-To Guide

Revision Information

Guide ID: Labor Distributions

Revision Date: 07/14/2009

Version: 1.0

APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon

- Do not share your passwords or store them in an unsecured manner.
- Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information

- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.

Copyright © 2009, Board of Trustees of the University of Illinois. All rights reserved. No part of this publication may be reproduced or used in any form or by any means — graphic, electronic or mechanical, including photocopying, recording, taping or in information storage and retrieval systems — without written permission of the Board of Trustees of the University of Illinois.

HR Front End Labor Distributions Quick View

- 1
 - Locate the employee's record
- 2
 - Enter the change date in the date field and click View
- 3
 - Select Labor Distribution from the Transaction Menu.
- 4
 - Make necessary changes to the Labor Distribution fields and Save.
- 5
 - Review the proposed changes in the Employee Record View.
- 6
 - Transaction is routed and applied to Banner.

TABLE OF CONTENTS

Introduction	5
Assumptions	5
What Is Labor Distribution Transaction?	5
Conventions Used in this Guide	5
Completing a Labor Distribution Change	6
Updating Existing Labor Distribution	8
Updating Labor Distribution Using Drop-down Menus	8
Updating Labor Distribution Using the Inline Method	9
Adding a Labor Distribution	10
Removing an Existing Labor Distribution	12
Routing and Applying the Transaction	13
Routing the Transaction.....	13
Applying the Transaction	14
Labor Distribution Change Process Flow	15

Introduction

Assumptions

This guide assumes that you have completed the *HR Front End Overview and Navigation* online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the *HR Front End Overview and Navigation* course is not repeated in this guide.

What Is Labor Distribution Transaction?

Labor Distribution transactions are used when only the Labor Distribution or Budget Profile Code needs to be changed. Labor Distribution and Budget Profile Codes can also be changed using an Employee Job Record Change, but using the Labor Distribution transaction will allow for Department or College users to apply the transactions directly to Banner in most instances.



NOTE: If other Job or Position data needs to be changed in addition to the Labor Distribution or Budget Profile, use the Employee Job Record Change transaction type. (See Employee Job Record Change Quick Reference Guide)

Conventions Used in this Guide



Indicates a **Note** or additional information that might be helpful to you.



Indicates a **Hint** such as a tip, shortcut, or additional way to do something.



Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

Completing a Labor Distribution Change

The Labor Distribution transaction is completed directly in the Employee Record View screen. It is important that the date be set to the date the change should occur prior to selecting the transaction type.



NOTE: The Labor Distribution only transaction can be directly applied to Banner if there are no additional changes (components). If there are additional components, then additional route stops will be added.



HINT: The Labor Distribution transaction type only allows changes since the Last Paid Date on the job record. If you need to make a labor distribution change that should have taken effect before the Last Paid Date on the job record you must make the change using an Employee Job Record Change transaction.

1. Use the **Employee Search** to locate the employee and open the Employee Record View (ERV).
The Employee Search screen is displayed. (See Figure 1: Employee Search Screen)
2. Select the desired employee from the search results and click **Select**.
The Employee Record View is displayed.

UIN	Last Name	First Name	E-Class	Emp Status	Home ORG
0001123456	Trump	Donald	BA - Acad/Pro 12mth Ben Elig	A	U-9-699008 - AITS ITPC

Figure 1: Employee Search Screen

3. Enter the date the change should be effective in the **Date** field, and then click **View**.
Screen refreshes and displays Employee Record View for the date selected.
4. From the **Transactions** menu, select **Labor Distributions**.
Screen refreshes and transaction type is displayed on the Transaction Bar.
5. Expand the appropriate **Job Detail** Accordion.
Current Job Detail is displayed.
6. Expand the **Job Labor Distributions** accordion. From this point, users will have different options:
 - a. **Edit** the Labor Distribution
 - b. **Remove** the Labor Distribution
 - c. **Add** a new Labor Distribution

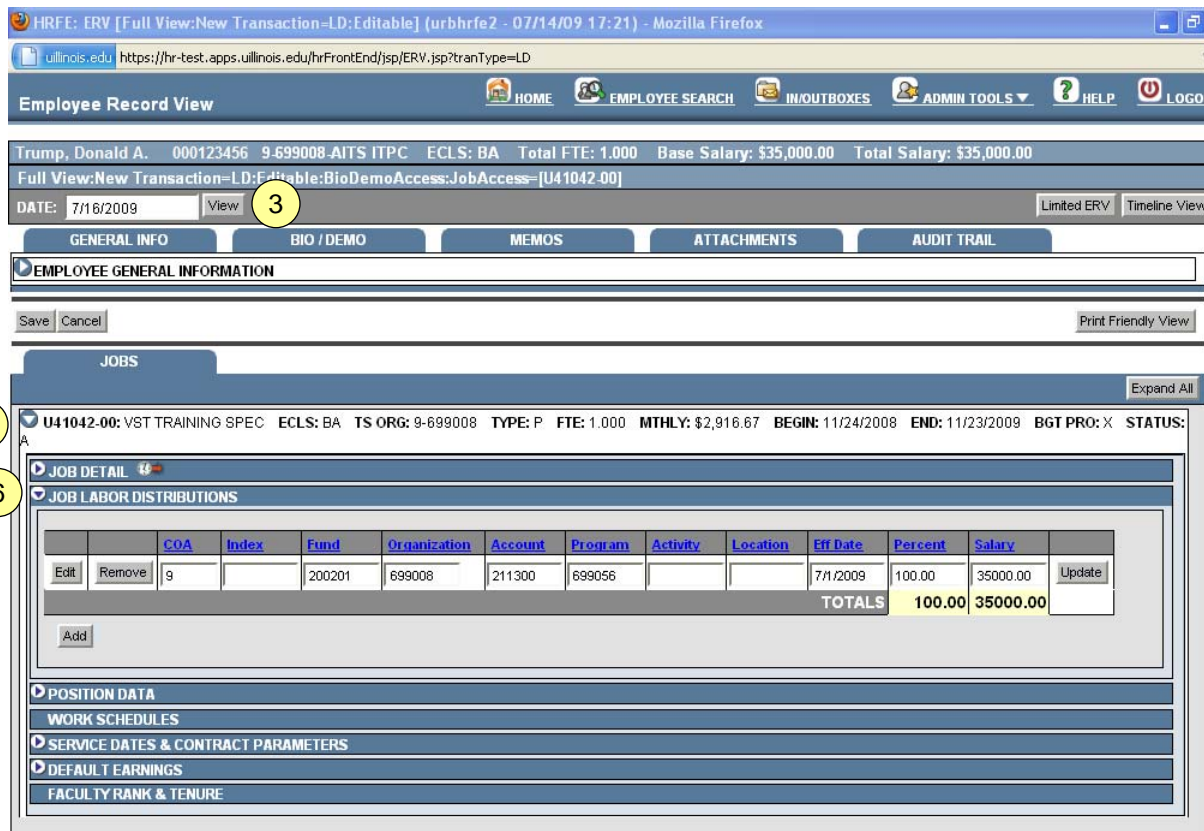


Figure 2: Labor Distribution Accordion - Expanded

Updating Existing Labor Distribution

There are two methods to add or update an existing Labor Distribution: using the drop-down menus and using the inline method. If you are certain of the data you are entering in the fields, using the inline method will save time. If you need to verify that the data entered in each field of the FOAPAL is correct, click **Edit** and use the drop-down menus.

Updating Labor Distribution Using Drop-down Menus

1. Follow the steps for beginning a Labor Distribution transaction located on pgs. 6-7 of this guide.

Current Labor Distribution is shown and is editable.

2. Click **Edit** (located to the left of the row to be changed).

Screen refreshes and a vertical menu appears showing the current LD Values and Descriptions.

3. Change the necessary Labor Distribution fields.



HINT: If you begin typing a number in any of the FOAPAL fields, you can use the menus to the right to select the correct value. Once a value is entered, check the description that is populated to verify the data entered is correct.

4. Click the **Update** button located below the list.

Labor Distribution row is updated with new values displayed in red, and old values displayed in white. Effective date is updated to match the date selected in step 3.



WARNING: When using the vertical menu to edit Labor Distribution, you must use the Update button located below the list. Using the Update button to the right of the row will result in an error. Also, clicking the Save button without first clicking Update will result in changes being lost.

5. Click **Save**.

Transaction is saved. Changes are shown under the Proposed Changes accordion.

JOBS Expand All

U86653-00: OFFICE MGR (LU) ECLS: CA TS ORG: 9-661000 TYPE: P FTE: 1.000 HRLY: 21.786000 BEGIN: 12/21/2003 BGT PRO: RO STATUS: A

JOB DETAIL

JOB LABOR DISTRIBUTIONS

	COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
8	9		100009	661000	212900	661001			1/20/2009	100.00	42482.70	Update
TOTALS										100.00	42482.70	

Close

COA: 9 - University of Illinois - Admin

Index:

Fund: 100009 100009 - 103 FY09 GRF/IF General Funds

Organization: 661000 661000 - Decision Support 9

Account: 212900 212900 - Miscellaneous Assistant Salary

Program: 661001 661001 - Decision Support

Activity:

Location:

Effective Date: 1/22/2009

Percent: 100.00

Salary: 42482.70

Add Update 10

POSITION DATA

WORK SCHEDULES

SERVICE DATES & CONTRACT PARAMETERS

DEFAULT EARNINGS

FACULTY RANK & TENURE

10 Save Cancel Print Friendly View

Figure 3: Updating Labor Distribution with Drop-down Menus

Updating Labor Distribution Using the Inline Method

The Inline method for changing Labor Distribution information allows for faster changes. Note that if this method is used, the user will not see the descriptions for each of the Labor Distribution fields.

1. Follow the steps for beginning a Labor Distribution transaction located on pgs. 6-7 of this guide.

Current Labor Distribution is shown and is editable.

2. Click inside the desired labor distribution fields to be changed and enter the new data.
3. Click **Tab** to move to next field.

New values show in red. Old values show in white below.

4. When all fields have been changed, click the **Update** button to the right of the row.

Labor Distribution row is updated with new values displayed in red, and old values displayed in white. Effective date is updated to match the date selected in step 3.

5. Click **Save**.

Transaction is saved. Changes are shown under the Proposed Changes accordion.

U41042-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 1.000 MTHLY: \$2,916.67 BEGIN: 11/24/2008 END: 11/23/2009 BGT PRO: X STATUS:

COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary
19		100010	699000	211300	699055			7/1/2009	100.00	35000.00
200201			699008		699056					
TOTALS									100.00	35000.00

Save Cancel Print Friendly View

Figure 4: Updated Labor Distribution Using the Inline Method

Adding a Labor Distribution

- Follow the steps for beginning a Labor Distribution transaction located on pgs. 6-7 of this guide.
Current Labor Distribution is shown and is editable.
- Click **Add**.
Labor Distribution fields are populated.
- Enter the necessary Labor Distribution information
As information is entered, the description menus are refreshed and data can be selected from the menus.
- Enter the percentage or salary information for the Labor Distribution.
- When all necessary fields have been completed, click **Add**.
New Labor Distribution row is displayed
- Click **Save**
Transaction is saved. Changes are displayed under Proposed Changes accordion.



HINT: If the new Labor Distribution row is similar to an existing row, click **Edit** next the existing row, modify the data, and then click **Add** to add as a new row.



NOTE: Remember that the total percentage of all Labor Distribution rows must equal 100%.

JOB DETAIL

JOB LABOR DISTRIBUTIONS

	COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary		
Edit	Remove	9		200201	699008	211300	699006			7/16/2009	100.00	35000.00	Update
TOTALS											100.00	35000.00	

Close

COA: 9 - University of Illinois - Admin

Index:

3 Fund: 200100 200100 - 100 Consolidated Group Investments

Organization: 699000 699000 - Admin Info Technology Services

Account: 211300 211300 - Administrative/Professional Salary

Program: 699009 699009 - AITS COE Operating

Activity:

Location:

Effective Date: 7/17/2009

Percent: 50 **4**

Salary:

5 Add Update

6 Save Cancel

Print Friendly View

POSITION DATA
 WORK SCHEDULES
 SERVICE DATES & CONTRACT PARAMETERS
 DEFAULT EARNINGS
 FACULTY RANK & TENURE

Figure 5: Adding a Labor Distribution

JOBS

Expand All

U41042-00: VST TRAINING SPEC ECLS: BA TS ORG: 9 699008 TYPE: P FTE: 1.000 MTHLY: \$2,916.67 BEGIN: 11/24/2008 END: 11/23/2009 BGT PRO: X STATUS:

JOB DETAIL

JOB LABOR DISTRIBUTIONS

	COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary		
Edit	Remove	9		200201	699008	211300	699006		7/16/2009	75.00	26250.00	Update	
									7/16/2009	100.00	35000.00		
Edit	Remove	9		200200	699002	211300	699017		7/16/2009	25.00	8750.00	Update	
TOTALS											100.00	35000.00	

Add

Figure 6: Labor Distribution Section after Adding New Row

Removing an Existing Labor Distribution

1. Follow the steps for beginning a Labor Distribution transaction located on pgs. 6-7 of this guide.

Current Labor Distribution is shown and is editable.

2. Click **Remove** next to the row to be removed.

Screen refreshes and Labor Distribution row is removed.

3. Make any other needed changes to other Labor Distribution rows (for example, changing the percentage of salary or adding additional rows).

4. Click **Save**.

Transaction is saved. Changes are displayed under the Proposed Changes accordion.

JOB LABOR DISTRIBUTIONS													
		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
	Remove	9		100010	904000	211300	904003			7/16/2009	100.00	60900.00	Update
										7/17/2009			
Edit	Remove	9		100010	904001	211300	904004			7/18/2009	100.00	60900.00	Update
TOTALS											200.00	121800.00	
Add													

Figure 7: Removing a Labor Distribution Row

Routing and Applying the Transaction

Routing the Transaction

1. Once all changes have been entered, click **Save**.
2. Click **Route**.

Once the transaction routes, a success message will appear in green, located above the transaction.



NOTE: If the Labor Distribution transaction is able to be directly applied, you will see a **Take Ownership** button on the Employee Record View after routing.

The screenshot shows the 'Employee Record View' interface. At the top, there is a navigation bar with links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, ADMIN TOOLS, HELP, and LOGOUT. Below this, a yellow message box displays the text: 'Success routing to ORG:Default:Apply B U-9-AG-904-904000 (32665:162543)'. The main content area shows employee details for Donald A. Trump, including his ID (000123456), organization (9-904000-Univ Ofc for Human Resources), and salary information. A 'Full View' section provides a detailed transaction summary. Below this, a 'PROPOSED CHANGES' table is visible, listing a change for the job 'U81177-00 TRAINING PROG COORD' on 07/16/2009. At the bottom, there are tabs for GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL, along with buttons for 'Take Ownership' and 'Print Friendly View'.

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
View 62163	07/16/2009		U81177-00 TRAINING PROG COORD	9-904000 Univ Ofc for Human Resources		LD	

Figure 8: Success Routing Message

Applying the Transaction

In most instances, Labor Distribution Only changes are able to be applied to Banner by the Department Initiator. After the Initial route, you will see a **Take Ownership** button in the Employee Record View.

To apply the transaction:

1. Click **Take Ownership**.
2. Review the transaction and make any necessary changes
3. Click **Apply**.

*The screen will refresh with the **Historical Employee Record View** and a **Success Applying** message. Both of these factors indicate that the data has been successfully applied to Banner.*



NOTE: If the labor distribution was changed to an organization that you do not have security for, the transaction will need to route to that other organization for review before it can be applied to Banner.

Historical Employee Record View

• Success applying

Trump, Donald A. 000123456 9 904000 Univ Ofc for Human Resources ECLS: BA Total FTE: 1.000 Base Salary: \$60,900.00 Total Salary: \$60,900.00
 Historical Employee Record View Transaction (32665:162544) LD (62163):Owner-No (None):Completed:Readonly:BioDemoAccess:Job Access=[U82507-00,
 U81177-00, U00928-09, U44478-00, U00928-00, U00928-02, U00928-04, U00928-01, U00928-08, U00928-05, U00928-03, U40120-00], Stop: ORG:Default:Apply B U.S.AG-
 904-904000 (32665:162544)

DATE: 7/16/2009

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
View 62163	07/16/2009		U81177-00 TRAINING PROG COORD	9-904000 Univ Ofc for Human Resources		LD	Pass

GENERAL INFO | BIO / DEMO | MEMOS | ATTACHMENTS | AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

Print Friendly View

JOBS

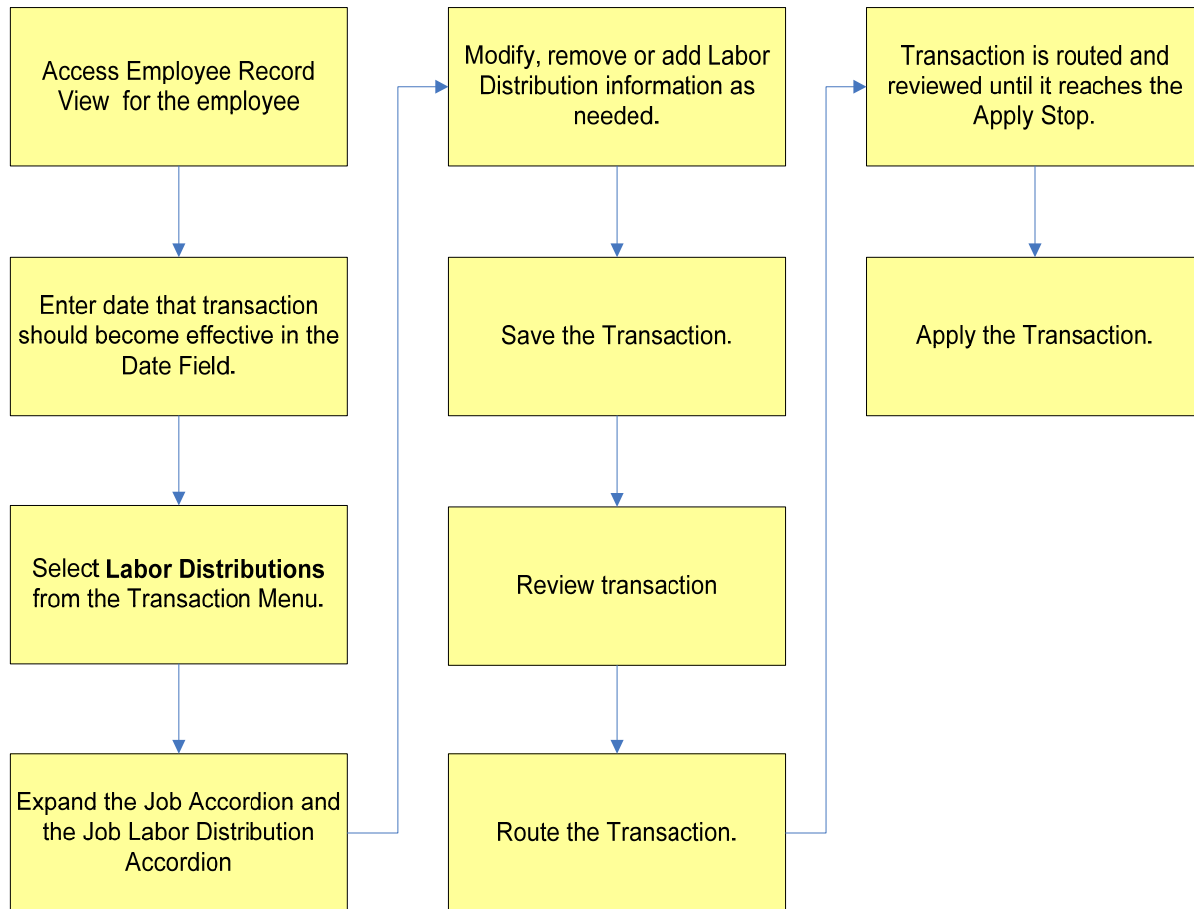
Expand All

U81177-00: TRAINING PROG COORD ECLS: BA TS ORG: 9-904000 TYPE: P FTE: 1.000 MTHLY: \$5,075.00 REGID: 12/16/2007 BGT PRO: R STATUS: A

Figure 9: Success Applying Message

Labor Distribution Change Process Flow

Below is the flow of the Job Labor Distribution Changes process.



THIS PAGE INTENTIONALLY LEFT BLANK