Labor Distributions

Human Resources Front End

How-To Guide

HR Front End Training Team
Labor Distributions

HR Front End

How-To Guide

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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.

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## 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.**
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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.*

![Figure 1: Employee Search Screen](image)
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

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*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.
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.*
Adding a 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 Add.
   *Labor Distribution fields are populated.*

3. Enter the necessary Labor Distribution information
   *As information is entered, the description menus are refreshed and data can be selected from the menus.*

4. Enter the percentage or salary information for the Labor Distribution.

5. When all necessary fields have been completed, click Add.
   *New Labor Distribution row is displayed*

6. 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%. 

### Labor Distributions

**Figure 5: Adding a Labor Distribution**

![Figure 5: Adding a Labor Distribution](image)

**Figure 6: Labor Distribution Section after Adding New Row**

![Figure 6: Labor Distribution Section after Adding New Row](image)
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.

![Figure 7: Removing a Labor Distribution Row](image-url)

**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.

**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.

![Success Applying Message](image-url)

*Figure 9: Success Applying Message*
Labor Distribution Change Process Flow

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

1. Access Employee Record View for the employee
2. Enter date that transaction should become effective in the Date Field.
3. Select Labor Distributions from the Transaction Menu.
4. Expand the Job Accordion and the Job Labor Distribution Accordion
5. Modify, remove or add Labor Distribution information as needed.
6. Save the Transaction.
7. Review transaction
8. Route the Transaction
9. Transaction is routed and reviewed until it reaches the Apply Stop.
10. Apply the Transaction.