Edition

2008

VIRGINIA TECH

Office of Budget and Financial Planning

FACSAL User Manual

VIRGINIA TECH OFFICE OF BUDGET AND FINANCIAL PLANNING

FACSAL User Manual

© OBFP 322 Burruss Hall Blacksburg, VA 24060 Phone 540.231.6419 • Fax 540.231.6156

Table of Contents

| FACSAL OVERVIEW | 1 |
|--------------------------------|----|
| FACSAL Classic | 1 |
| FACSAL Express | 1 |
| FACSAL CLASSIC | |
| Accessing the System | 3 |
| Menu - Navigation | |
| Locating a Faculty Record | 4 |
| Drilldown Method | |
| Search Method | |
| _Updating a Faculty Record | 5 |
| Creating Meeting Report Drafts | |
| Validating Your Data | 8 |
| FACSAL EXPRESS | 10 |
| Accessing the System | 11 |
| Create Excel File | |
| Upload | 12 |
| Restore | |
| FREQUENTLY ASKED QUESTIONS | 15 |
| CONTACT INFORMATION | |
| | |

Section

FACSAL OVERVIEW

The Faculty Merit System, or FACSAL for short, is a data entry and reporting tool used for the administration of the faculty merit salary increase recommendation process. The data entry task is performed by designated users at the college and vice-presidential level. Once finalized, this data is used to produce the reports presented in each college's merit review meeting with the Dean, Provost, and President. In addition, the FACSAL system is used to produce the final recommendation report for approval by the Board of Visitors. After salary recommendations have been both reviewed internally and approved by the Board of Visitors, the FACSAL data is loaded into Banner.

There are currently two "windows" thru which a FACSAL user can access his or her data for manipulation, FACSAL Classic and FACSAL Express.

FACSAL Classic

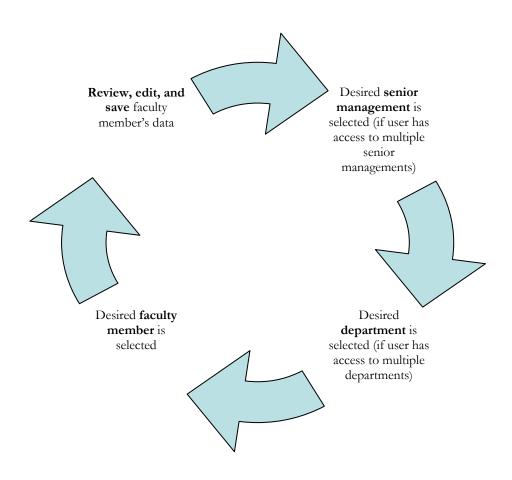
<u>FACSAL Classic</u> is the original FACSAL interface. It is a web application that allows the user to find and update one faculty member's data at a time. In addition to updating records, the user is able to generate meeting reports for their review. Please see <u>Section 2</u> for detailed instructions on how to use FACSAL classic.

FACSAL Express

<u>FACSAL Express</u> is an application which allows the user to update all of his or her FACSAL data at one time utilizing Microsoft Excel. The user is able to download a spreadsheet of their current data, make appropriate changes (merit increases, appointment changes, etc.), and then upload the revised spreadsheet into FACSAL. Please see <u>Section 3</u> for detailed instruction on FACSAL Express.

FACSAL CLASSIC

FACSAL Classic is the window thru which FACSAL data can be viewed and updated one record at a time. The following represents the basic web page/process flow of the system:

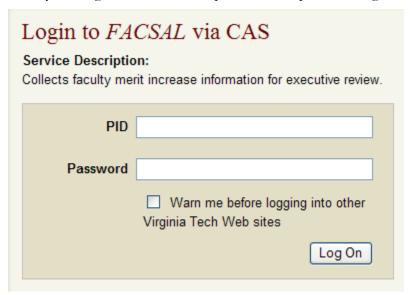


Accessing the System

The FACSAL Classic system can be accessed by clicking the FACSAL link on the Office of Budget and Financial Reporting website or by typing the following URL directly into an Internet Explorer 5.5 or later browser session: https://www.obfp.vt.edu/facsalclassic/login.aspx. To access the system the user must have a current Virginia Tech PID and password and be a designated FACSAL user.

Steps:

- 1. Navigate to the FACSAL Classic authentication page via one of the methods described above
- 2. Enter your Virginia Tech PID and password and press the Log On button



FACSAL main page (Senior Management List) is displayed. If the user has access to only one senior management, the department list page will be displayed

Menu - Navigation

The FACSAL menu is the primary means of page navigation thru the system. It consists of the following buttons:

- 1. Logout To perform system logout. It is important perform a system logout to ensure that your data remains secure.
- 2. Select Sr Management To display all Senior Management areas that the user currently has access to.
- 3. Select Department To display all departments within the selected Senior Management.
- 4. Select Personnel To display all the faculty members within the selected department.
- 5. Search To perform a name or ID search for a desired faculty member
- 6. Create Meeting Report To generate a meeting report for a given Senior Management.
- 7. Check Data To perform a name search for a desired faculty member

Locating a Faculty Record

As mentioned previously, the FACSAL classic web system is primarily used to update one faculty member record at a time. To update a record the user must first find the desired faculty member in the system. The user currently has two methods to locate a desired faculty member within the system.

Drilldown Method

Each faculty member record resides within a department which resides within a Senior Management. Provided that this department/Sr. Management information is known, the system allows the user to "drilldown" to a faculty member by first selecting the member's Sr Management area, then department, and finally selecting the member from the list.

Steps:

1. **Click** the link for the desired **Senior Management** from the available list. Departments within the selected unit will be displayed.

Select Senior Management COLLEGE OF VETERINARY MEDICINE

2. **Click** the link for the desired **department** from the department list. Faculty members in that department will be displayed

Select Department ADMINISTRATION - VETERINARY MEDICINE BIOMEDICAL SCIENCE EQUINE MEDICAL ANCILLARY

3. **Click** the Name link for the desired **faculty member** from the personnel list. Faculty member record will be displayed.

| Edit Merit | Name | Rank | Current Salary | Merit | Special | Eminent | New Salary | Percent Increase | Keep in FACSAL |
|---------------|-------------------|---------------------|-------------------|---------|---------|---------|---------------|---------------------|-------------------|
| Edit | AHMED S A | Professor | \$50,000 | \$2,000 | \$0 | \$0 | \$52,000 | 4.00% | Υ |
| Edit | BLODGETT DENNIS J | Associate Professor | \$50,000 | \$0 | \$0 | \$0 | \$50,000 | 0.00% | Υ |
| Edit | BOYLE STEPHEN M | Professor | \$50,000 | \$0 | \$0 | \$0 | \$50,000 | 0.00% | Υ |
| Edit | CACECI THOMAS | Associate Professor | \$50,000 | \$0 | \$0 | \$0 | \$50,000 | 0.00% | Υ |

4. If multiple faculty members exist in the department, the Name dropdown field can be used to navigate appropriately thru the record-set to update other members of the selected department. Note: If changes have been made to the faculty member's record, the save button must be clicked before navigating to another record.

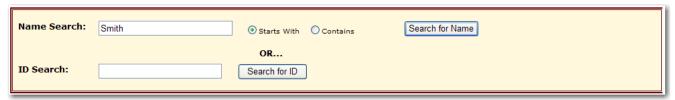


Search Method

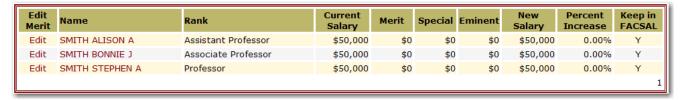
A user may retrieve a faculty member's record by performing a name search within the system. The last name is required while the first name can be entered to narrow the search

Steps:

- 1. Press the **Search link** from the menu
- 2. Type a name (last name first name –without a comma) into the **search field**.
 - a. Starts With The last name (or part of it) is required.
 - b. Contains Any part of the name (first or last) can be entered.
- 3. Press the **Search for Name** button



4. If multiple faculty members name match your search string, you will be able to select the desired record.



Updating a Faculty Record

Once a faculty member's record has been retrieved, the user may update available data if desired. The fields available for update are:

- Keep in FACSAL— Mark 'N' if this person should not be included in the Faculty Merit Process (i.e. not returning, restricted appointment, etc.).
- Type Categorize faculty as Teaching/Research, Admin Professional, Research Faculty, etc.

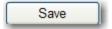
- Rank Select the faulty member's rank
- Appointment Select whether the faculty member is Academic Year, Calendar Year, or on a Research Conversion appointment.
- Title Include a Title for Department Heads, Deans, Endowed Professors. etc.
- FTE Full Time Employee
- Current Salary Amount of salary currently reflected in Banner.
- Merit Recommended dollar amount for merit.
- Special Recommended dollar amount for special increase (Above merit amount for Internal Alignment, External Market Competitiveness, Increased Responsibility, or Retention)
- Eminent Recommended dollar amount for increase to the eminent scholar supplement (above the merit/special portion)
- Notes
 - 1. Reason for Base Salary Change Dropdown list of common reasons. Refer to the annual memo for descriptions of each.
 - 2. Base Salary Change Notes Additional free form explanation for base adjustment footnote.
 - 3. Reason for Low/No Adjustment Dropdown list of common footnotes. Refer to the annual memo for descriptions of each.
 - 4. Low Adjustment Notes Additional free form explanation for low adjustment footnote.
 - 5. Reason for Special Adjustment Select one or more of the predefined reasons if a special adjustment has been given.
- Additional Comments Explanation to appear on report for meeting with the executives. This
 comment should be short and specific (i.e. try to not to use a generic comment multiple times).

Steps:

1. **Retrieve** the Faculty member's record using either the Drilldown or Search method described above.



- 2. **Update** the desired data fields listed above
- 3. Press the **Save** button. Changes will be saved. **Note:** Each faculty member's record must be saved individually before preceding to the next record. You will be notified that the record has been successfully saved.



Quick Editing of Merit

If the proposed merit amount is within the normal boundaries (2%-7%) then the merit amount can be edited without going to the faculty detail screen (seen above). This will allow the user to quickly edit the Merit adjustment amount without needed to pull up the faculty's entire record.

Steps:

- 1. **Navigate** to the Personnel selection screen as directed above.
- 2. Click the **Edit** link next to the faculty name for which you would like to edit the merit increase.
- 3. Enter the numeric merit increase amount



- 4. Click the **Update** link to save your changes.
- 5. Note: Merit amount must be greater than 2% and less than 7% of the current salary.

Creating Meeting Report Drafts

A user is able to generate a report that summarizes his or her FACSAL data at either the Senior Management or Department level. The report will contain each faculty member along with the current salary, proposed merit, merit increase, special adjustment, overall increase, recommended new salary, appointment, and any comments that have been entered.

The Senior Management Meeting report displays all faculty members within the selected senior management (e.g. College of Agriculture, College of Business, Provost, etc.) while the Department Meeting report displays only faculty members within the selected department. (e.g. English, Mechanical Engineering, etc).

Steps:

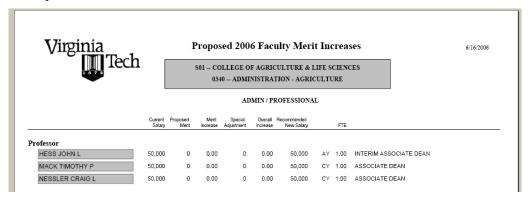
1. Click the **Create Meeting Report** link from the menu.



- 2. Select the desired **Report Type** (Senior Management or Department level)
- 3. Select the desired **Output Type** (PDF or Excel)
- 4. Select the desired Senior Management from the dropdown list.
- 5. If creating a department report, select the desired department from the dropdown list
- 6. Press the **Create Report** button.



Depending on the user's personal PC settings the report will either open in the browser or prompt for Open/Save.



Validating Your Data

The data that resides within FACSAL is a mix between data that has been brought forward from the past year and data that is extracted from Banner around the first week of July. After this combination of data is placed in the FACSAL database, it lives separately from Banner throughout the process. This segregation allows for inconsistencies to occur (via personnel actions, etc.) between the two systems. In order to verify that FACSAL data matches Banner data, a data validation report is available for your viewing.

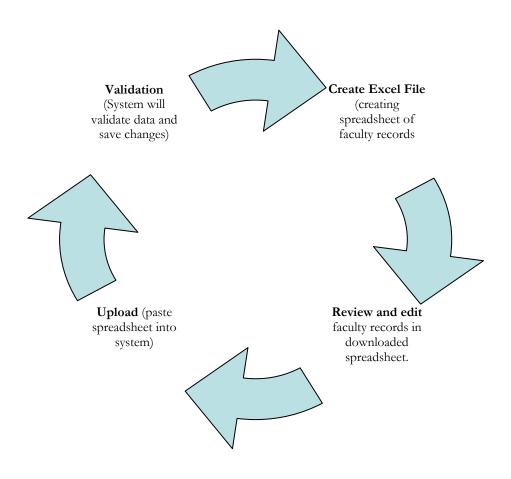
Steps:

- 1. Click the **Check Data** link from the menu to generate the validation report
- Depending on the user's personal PC settings the report will either open in the browser or prompt for Open/Save.
- 3. An Excel spreadsheet will be returned that has the following tabs
 - a. Salary Differences a difference between the "Current Salary" field in FACSAL and the faculty members Banner salary
 - b. Faculty Missing in Banner A faculty member is marked as "Keep in FACSAL" but does not have an active employee record in Banner
 - c. Appointment Differences a difference between the appointment (AY/CY) in FACSAL and the appointment reported in banner.

- d. FTE Differences A difference in the FACSAL FTE and Banner FTE
- e. Classification Differences A difference in how a faculty member is classified (i.e. AP vs. TR vs. Research)
- f. High Low Merit Issues Identifies faculty members who have a recommended increase outside the allowable boundaries (less than 2% or greater than 7%).
- g. Split Differences Identifies faculty members that reside in multiple departments (split funded) and have received different proposed merit increases.

FACSAL EXPRESS

FACSAL Express is the window thru which a user can update multiple faculty merit recommendations at one time. The system allows the user to download their current FACSAL data into a Microsoft Excel spreadsheet. Once in spreadsheet format, the user can make changes to the records as desired (except for the Name, ID, and Department fields) and upload the data at one time back into the system, replacing the previous values.



Accessing the System

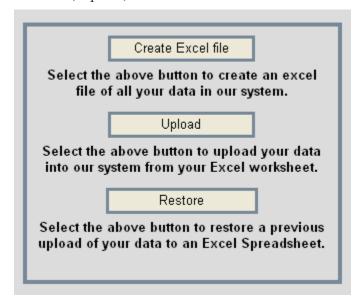
The FACSAL Express system can be accessed by clicking the FACSAL link on the Office of Budget and Financial Reporting website or by typing the following URL directly into an Internet Explorer 5.5 or later browser session: https://www.obfp.vt.edu/data%20express/login.aspx?application_code=facsal. To access the system the user must have a current Virginia Tech PID and password and be a designated FACSAL user.

Steps:

- 1. Navigate to the FACSAL Express authentication page via one of the methods described above
- 2. Enter your Virginia Tech PID and password and press the Log On button



3. FACSAL Express main page is displayed. From here the user may select one of three options: Create Excel File, Upload, or Restore.



Create Excel File

The first step in utilizing FACSAL Express is to download a current copy of your data. To do this the user must click the Create Excel File button, which creates a spreadsheet with all the faculty member records for which the user has access to. This spreadsheet can then become the working document on which merit recommendations are made and that eventually will get uploaded back into the system.

Steps:

- 1. Click the **Create Excel File button**
- 2. Depending on the setup of the user's PC, the resulting Excel file will either be opened in the browser OR the user will have the option to Open, Save, or Cancel the spreadsheet.
- 3. Assuming the **File Download** box is presented, select the desired option (Open or Save)
- 4. Alter faculty records as desired, but remember before a successful post a merit increase amount must be entered

Notes:

- Formulas. When updating your spreadsheet formulas are acceptable, FACSAL Express will pick up the cell's computed value
- Merit Amount Format. FACSAL requires a dollar amount for the merit recommendation. However you could uses percentages in your worksheet have Excel compute the merit and then upload the computed column.

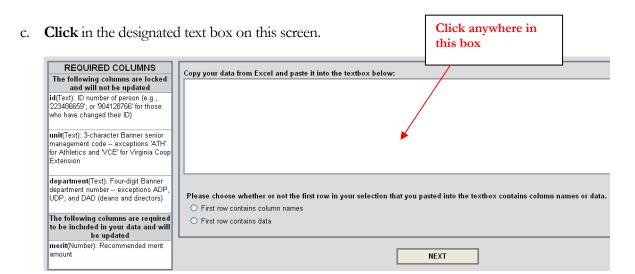
Upload

The second step in FACSAL Express is to upload the revised Excel spreadsheet into the system. This process comes after the Excel file has been created (as described above) and appropriate merit recommendations have been added as appropriate. The upload process is essentially a three step process of pasting your data, matching your columns to system defined fields, and allowing the system to validate and save the data. Assuming that the user has already updated the spreadsheet with merit recommendations the following procedure can be followed to upload the data:

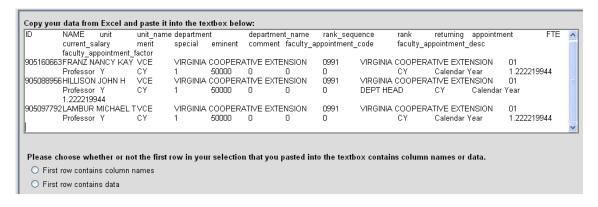
Steps:

1. Paste the spreadsheet into FACSAL Express

- a. In your Excel spreadsheet, highlight and copy the faculty records that you wish to update in the system. This can be done selecting the desired rows and utilizing the Edit > Copy command from the Excel menu.
- b. From the FACSAL Express main page click the **Upload** button. The paste page will be loaded.



d. Paste the rows copied from the Excel spreadsheet. This can be done by pressing Control + V or selecting File > Paste from the browsers menu. Your data will now be visible in the designated text box



- e. If you copied the column headings as the first row you pasted into FACSAL express select the First Row Contains column names radio button, if not select first row contains data radio button
- f. Click the **Next** button
- 2. Match the columns you pasted into FACSAL Express with the correct system identified field. It is very important that the ID, Unit, and department fields be correctly identified as these fields are used to locate the faculty record in the FACSAL database. Note: if you downloaded your excel file and have not altered the column layout (i.e. deleted or added columns) then this step will already done for you and simply need to be verified.
 - a. From the each column dropdown list, select the appropriate field name that matches the column's data. Note: If you do not wish to overwrite the data in FACSAL with the spreadsheet values for a specified column, select Do Not Import from the dropdown list.



b. Click Next

3. The system will perform some validations on the data that you entered. Once this validation has finished it will save the uploaded data and display a report of what your faculty data now looks like. Note: No user interaction is required here unless the pasted data is returned to the user as invalid. If this is the case, the user's data has not been uploaded and corrections will need to be made.

Notes:

- Spreadsheet layout. You can paste your rows and columns in any order, you have the opportunity (as described in step 2 above) to match up your columns with the data items that the system is expecting. However, as described in the interface, certain columns are required while others are optional. The required fields, id, unit, and department are needed to match up the record to the FACSAL database.
- Extra fields. You only need to paste in legitimate columns. If you have extra columns in between legitimate ones, you can tell the system to ignore them (Do Not Import).
- Repeating values. Each faculty record stands alone when it is uploaded, so the unit and department numbers must be included on every row with valid data.
- Incremental Work. Since each faculty records stands alone, you can copy and paste all faculty records or
 just a subset, i.e. you could do one department at a time if desired.

Restore

The Restore functionality in FACSAL Express can be utilized by the user to create a spreadsheet of a previous data upload.

Section

FREQUENTLY ASKED QUESTIONS

What is FACSAL?

FACSAL is a computer system that allows the entry of faculty merit salary increase recommendations. The data entry is done in the colleges and vice-presidential areas, and the data is used to produce reports that are used in each college's merit review meeting with the president, provost and dean. After the salary increases have been reviewed internally and approved by the Board of Visitors, the FACSAL data is fed automatically to Banner.

Who uses FACSAL?

Each college and VP area has one or two people assigned to enter data, usually the college fiscal officer and/or an assistant.

What are some important dates for FACSAL?

The system will be available on July 9 this year. The deadline for entering all data is August 23. The meetings with the president take place in September. Raises will be approved by the Board at its November meeting.

How do I get to FACSAL?

Go to the Budget Office website, <u>www.obfp.vt.edu</u>, and click on FACSAL. You will log in with your Virginia Tech PID and password. If the system says you are unauthorized, please contact Brad Sumpter (231-2239) or Allen Campbell (231-4563) in the Budget Office.

Do I need any special software to use FACSAL?

No. FACSAL is a web application and best viewed in Internet Explorer. If you use FACSAL EXPRESS, you must prepare your upload data using Microsoft Excel.

How does FACSAL EXPRESS work?

You log in with your PID and password and click UPLOAD. A blank window appears in which you can copy and paste your Excel worksheet contents. Click on Next and the system will guide you through the interface.

What does my worksheet have to look like?

FACSAL EXPRESS shows you a list of columns you can upload. Some are required, others are optional. The required fields *unit*, *department* and *id* are needed to match up to the FACSAL database.

Do the rows and columns in my worksheet have to be in a certain order?

You can paste in your rows and columns in any order. You will have the opportunity to match up your columns with the data items the system is expecting. The system uses the values of *unit*, *department* and *id* to match to individual faculty members in the FACSAL database.

Can I use formulas?

Formulas are fine; FACSAL EXPRESS will pick up each cell's computed value.

What about column width and format?

Column width and format should not matter, except in two special cases. Excel's default format will drop leading zeroes from the *id* and *department* columns. If you paste the data to EXPRESS that way, the system will fail to match those records. Use this trick to fix the data before uploading it: Format the cells using the 'Custom' category; in the 'Type' box, type 0000 (for *department*) or 000000000 (for *id*).

What if I leave a cell blank, for example, I leave the *special* column blank on one faculty member, but have valid numbers for *special* on everybody else?

That's okay. The system will ignore any blank columns and leave the original data alone in the FACSAL database.

Valid values in other cells will be picked up and copied to FACSAL.

Do I need to repeat the unit and department codes on each line?

Yes. Each row stands alone when it is uploaded, so the unit and department numbers must be included on every row with valid data.

Can I upload a percentage and let FACSAL compute the merit amount?

No. FACSAL requires a dollar amount for the merit recommendation. However, you could use percentages in your worksheet, have Excel compute the merit, and then upload the computed column.

I tried to upload and EXPRESS gave me this message: "The following records that you pasted cannot be found in our system". What does that mean?

EXPRESS is matching your data one-to-one with the data it has on file in the regular FACSAL system. If you include a faculty member it doesn't have, or who it thinks belongs in a different unit or department, the system will reject your upload. You must add or delete rows to match FACSAL exactly, then try again. You will also get this message if you forgot to format the *id* and *department* fields to add leading zeroes.

How do I know which faculty are in my unit, according to FACSAL?

There are several ways. You can log into regular FACSAL and click the 'Print Unit' button to get a draft meeting report. You can look at the data in FACSAL, or print departments individually. You can have FACSAL EXPRESS create a spreadsheet containing all of your faculty records, each of which will display a unit and department. To do this, click 'Create Excel File' immediately after you log in.



CONTACT INFORMATION

FACSAL is administered by the Budget Office. Please refer to the following contact list when assistance is needed:

- For questions about individual faculty members (e.g. current salary, leave status, home department, etc) contact **Feride Daku** at fdaku@vt.edu or 540.231.8286
- For help with technical problems contact **Allen Campbell** at <u>acampb@vt.edu</u> or 540.231.4563 or **Brad Sumpter** at <u>bsumpter@vt.edu</u> or 540.231.2239
- For questions on general policy related to the merit process, please refer to the annual memorandum from Pat Hyer and Dwight Shelton or contact **Pat Hyer** at hyerp@vt.edu or 540.231.2350 or Tm Hodge at tlhodge@vt.edu or 540.231.6419.