SELECT THE DEPARTMENT FOR REVIEW:

- From the SAP menu open the folder Role Z_HRASR_DEPARTMENT.
- Select ZASR – Annual Salary Review Overview.
- Click the Matchcode button (on a Mac) to select Fiscal Year/Cycle/Step. The year changes each cycle year.
- Select ADM (Administrative Staff) review.
- Click the Matchcode button (on a Mac) to search for an SAP Org. Unit (under MIT-All). Note: If you know the SAP Org. Unit number you may enter it directly in the Org. Unit field. This will be an 8-digit code beginning with 1000.

Tip: See the Matchcode Search Quick Card if you do not know the specific number and need assistance.

- Click the List ASR button.
- The Status field is right next to Department name. Note: Changes cannot be made until the status is Released.

New Created by Compensation Office.
Released The Approver completed initial review and saved & released the ASR data for the DLC Administrator.
Submitted The Administrator has completed their review and saved & submitted the data in SAP.
Approved The Approver has completed their final review of the ASR data and approval it.
Activated Compensation Office activated the ASR data in SAP and it can be seen by HR and Payroll as soon as it is activated.

- Double click on the Department field to see the ASR amounts at the employee level. Note: The window lists the department’s employees who are eligible for the ASR. To sort or change the layout, refer to the Quick Card on Changing/Saving Layout.

New Column called Saved has been added in response to departments’ concerns about not knowing whose record they had changed prior to submitting. The column has a yellow triangle to indicate an employee’s record has not been updated or saved. When you make a change to the record and save it the yellow triangle becomes a green circle. This helps departments to know where they left off the last time they worked on the review.
MAKING ADJUSTMENTS: EMPLOYEE OVERVIEW SCREEN

- Make a change to either the %, Adjustment Amount, or New Total for an employee.
- After making a change, press the Enter key.
  **Note:** These three columns are connected, so changing the number in any one column will dynamically change the other two, after you press Enter.
- Click the Save button.

To export the data and use a “What If” scenario in Excel, see page 4.

MAKING ADJUSTMENTS: EMPLOYEE DETAIL SCREEN

- From the Employee Overview screen, double-click on the Employee Name field to view the Employee Detail screen.

TO REMOVE AN EMPLOYEE FROM THE REVIEW

- Click the Matchcode button in the Comment Field.
- Double click on your comment choice from the Comments Hit List.
- Press the Enter key.
- Click the Save button.
- Click the Back button to return to the Employee Overview screen. **Note:** The Adjustment Amount field for that employee is 0.00. The ASR Pool will decrease; the money cannot be re-allocated, except in the case of deferred merit.

TO ADD A LUMP SUM

- Click the Insert Line button on the Employee Detail screen.
- Click the Enter button on the Adjustment Type Hit List.
- Enter the correct amount in the Lump Sum Line. **Note:** The Lump Sum is a one-time payment and does not affect the New Total for the employee.
- Click the Save button.
- Click the Back button to return to the Employee Overview screen.
SUBMITTING THE ASR DATA:

After the Adjustment Amount changes have been completed and saved in SAP, the ASR data needs to be submitted back to the Assistant Deans for review and approval.

Note: Once the data is submitted, changes to the amounts can only be made by the Assistant Deans.

If you are not already at the Employee Overview screen, please see page 1 for instructions on Selecting your Department for Review.

- Click the Select All button to select all employee records.
- Click the Submit button. Note: The Exception column for each employee displays the “yellow light”. You can submit one employee at a time.

If you see a Base Allocation Error, this means an employee’s salary or percent effort has changed since the creation of the review. In this case, please contact Compensation.

- Click Back button to return to the Departmental Overview screen. Note: The Status has changed to Submitted on the Department Overview screen.
What If Scenario in Excel

If you prefer, you can download the employee data to an Excel spreadsheet before making adjustments in SAP. However, the final increase amounts must still be entered, saved & submitted in SAP.

- From the Employee Overview screen click the Export button.
- Select the Local File option.
- Select Spreadsheet.
- Click Enter button.
- Enter a File name. save as .xls
- Click the Generate button.
- Go to the Local File and open the spreadsheet.

Excel Spreadsheet Formatting

- Delete the 1st & 2nd blank columns.
- Insert 3 columns to the left of column D.
- Enter the following column headings in bold text: What if % What if Adj Amt What if Total
- Resize the columns as needed

Tip: To re-size all columns at once click on the box in upper right corner (above the #1) and select spreadsheet. Then place your cursor between column A & B and double click.

- Enter the formulas shown at right in columns E & F to calculate the What if Adjustment Amount & What if Total (where #=row number)

Note: Column E should show zeros and column F should show the Adjustment Base from column H.
- Enter a formula for the Total What if Adjustment Amount in column E: (On the same row as the totals for H, I, & L)

How To: Click in the cell in column F in the total row. Choose Insert ➔ Function. In the pop-up window choose SUM. In the next pop-up window, check that E7: E# defaults in the Number 1 field, if not fix the data. Click OK. Can use Auto Sum

- Enter a formula to calculate the Remaining Allocation Amount in column E below the Total What if Adjustment Amount.

Total Adjustment Amt – Total What if Adjustment Amt = Remaining Allocation Amt
=I#-E#