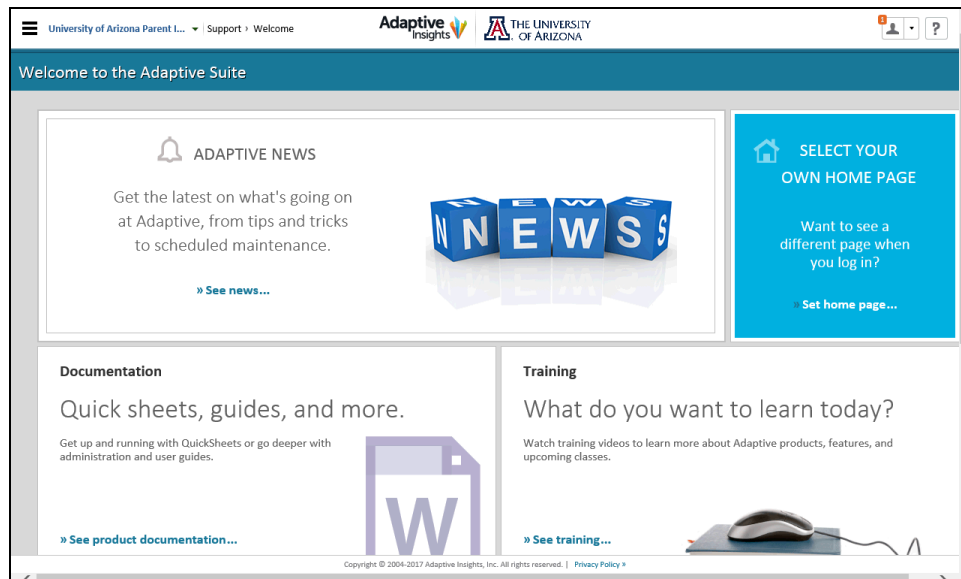





Annual Raise Planning

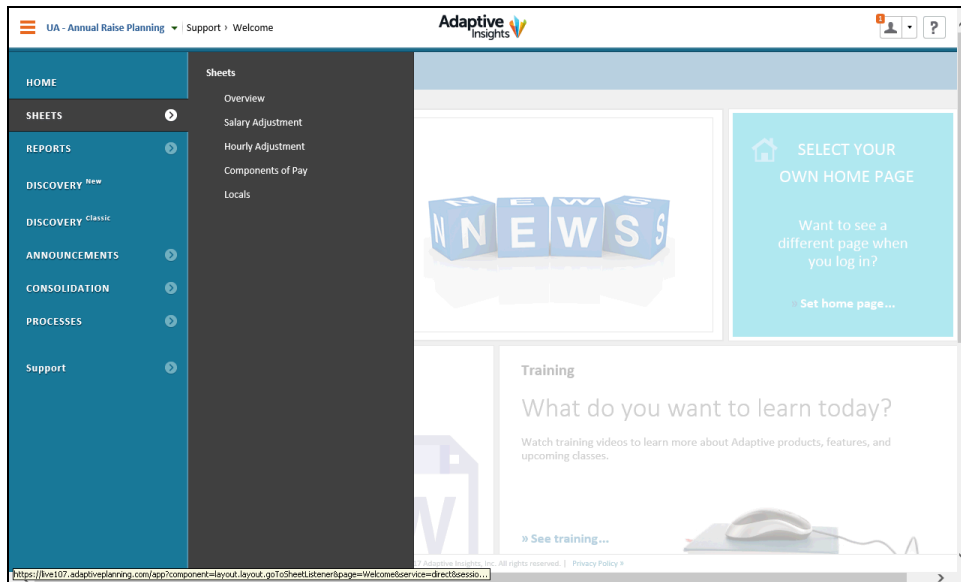
Procedure

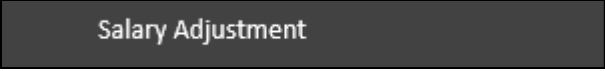
In this tutorial you will learn how to use **Adaptive Planning** to plan for the Annual Raises.

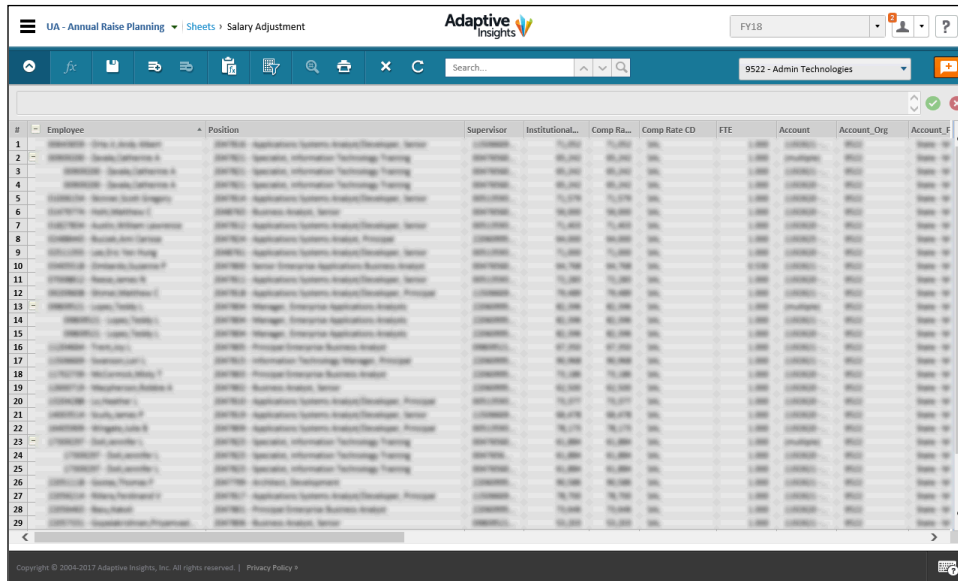
Step	Action
1.	<p>The link to the Adaptive Planning application is on the main UAccess (https://uaccess.arizona.edu/) portal.</p> <p>Note: Additional information is also available on the 2018 Salary Increase Program - FAQs (http://hr.arizona.edu/supervisors/compensation/2018-salary-increase-program-faqs) page.</p> <p>Click the Planning link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Planning</div>
2.	<p>Enter your NetID and Password.</p> <p>Click the LOGIN button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">LOGIN</div>



Step	Action
3.	Click the University of Arizona Parent drop-down arrow. 
4.	Click the UA - Annual Raise Planning list item. 
5.	While the main screen still looks the same, you are now able to access the Annual Raise Planning menus. Point to the Navigation Menu icon. 
6.	Point to the SHEETS arrow.



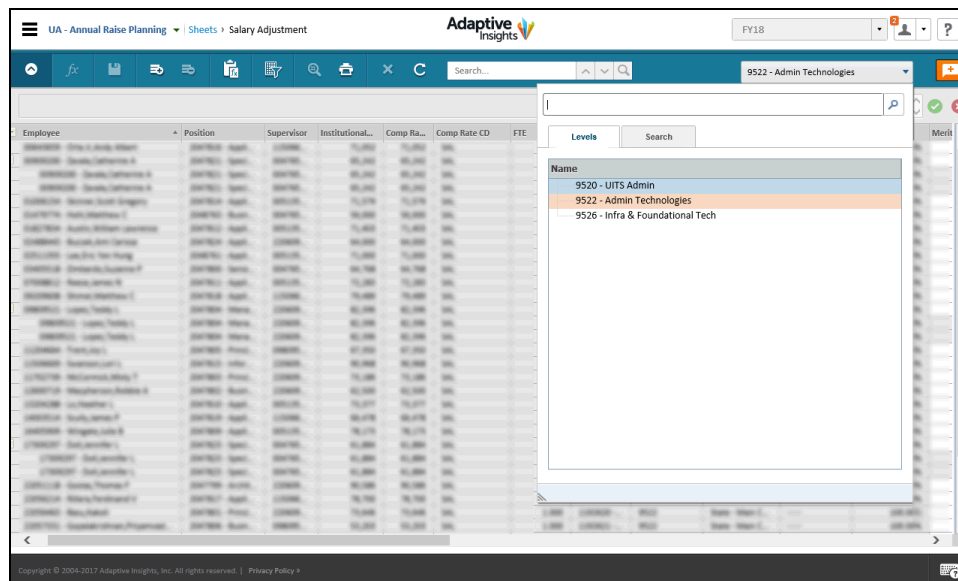
Step	Action
7.	The SHEETS menu contains links for Salary Adjustment, Hourly Adjustment, and Components of Pay. Note: This tutorial walks you through Salary Adjustment but Hourly Adjustment and Components of Pay work the same way. Click the Salary Adjustment link. 



UA - Annual Raise Planning | Sheets | Salary Adjustment | Adaptive Insights | FY18 | 9522 - Admin Technologies

#	Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Orig	Account_F
1	9522001	Chris L. Andy, Admin	9522001	9522001	75,200	75,200	50%	9522001	9522001	9522001
2	9522002	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
3	9522003	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
4	9522004	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
5	9522005	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
6	9522006	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
7	9522007	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
8	9522008	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9	9522009	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
10	9522010	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
11	9522011	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
12	9522012	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
13	9522013	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
14	9522014	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
15	9522015	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
16	9522016	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
17	9522017	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
18	9522018	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
19	9522019	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
20	9522020	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
21	9522021	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
22	9522022	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
23	9522023	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
24	9522024	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
25	9522025	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
26	9522026	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
27	9522027	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
28	9522028	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
29	9522029	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001

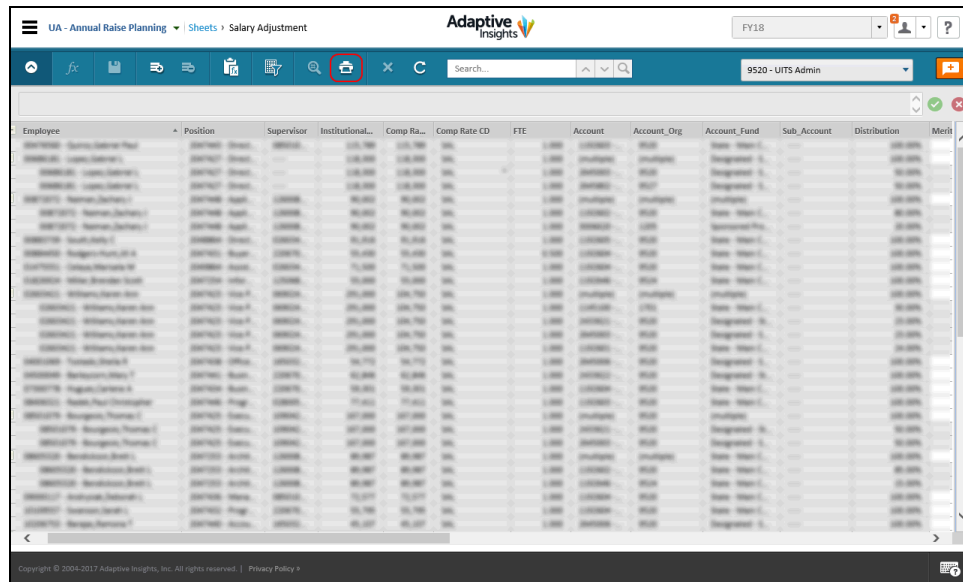
Step	Action
8.	<p>The system is configured to only give you access to the appropriate accounts. Based on that security this field may have one or more departments.</p> <p>Click the Department Name field.</p> <div style="border: 1px solid gray; padding: 5px; width: fit-content;"> 9522 - Admin Technologies </div>




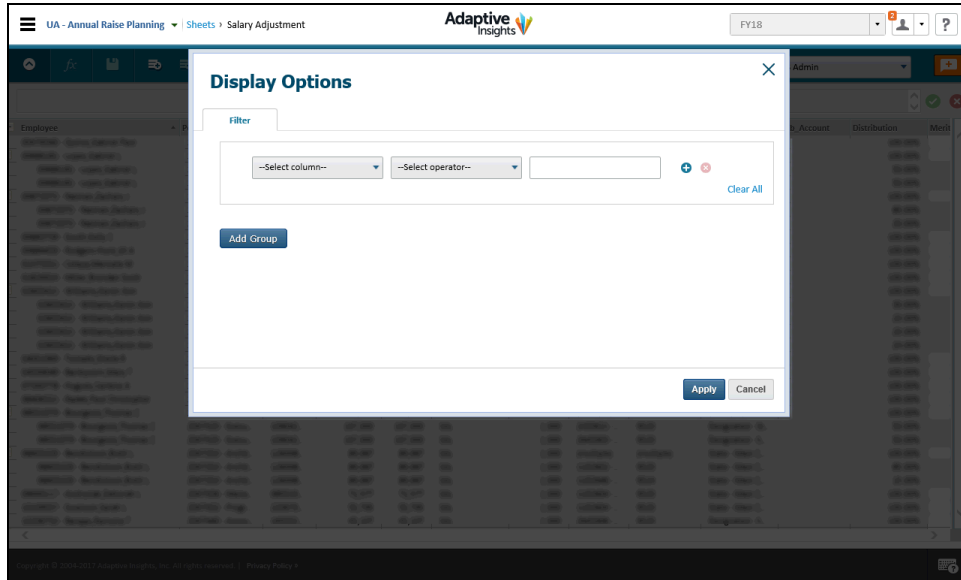
UA - Annual Raise Planning | Sheets | Salary Adjustment | Adaptive Insights | FY18 | 9522 - Admin Technologies

Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Orig	Account_F
9522001	Chris L. Andy, Admin	9522001	9522001	75,200	75,200	50%	9522001	9522001	9522001
9522002	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522003	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522004	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522005	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522006	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522007	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522008	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522009	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522010	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522011	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522012	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522013	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522014	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522015	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522016	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522017	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522018	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522019	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522020	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522021	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522022	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522023	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522024	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522025	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522026	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522027	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522028	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001
9522029	Debra L. Anderson	9522001	9522001	85,200	85,200	50%	9522001	9522001	9522001

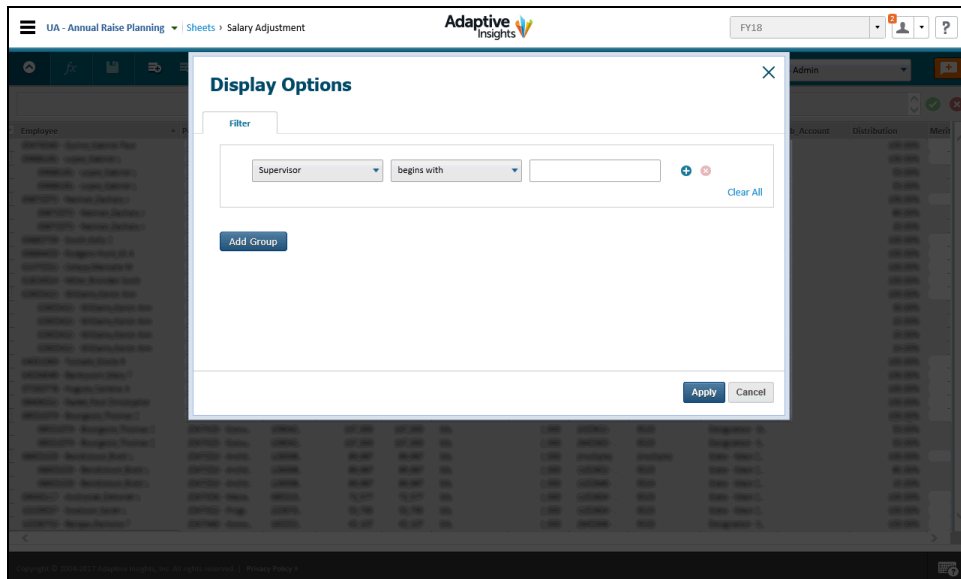
Step	Action
9.	<p>Select the department you are entering data for.</p> <p><i>Note: You can use the Search tab, which is helpful if you have a large number of departments and want to narrow down to a particular one without scrolling through the list.</i></p> <p>Click the 9520 - UITS Admin list item.</p>




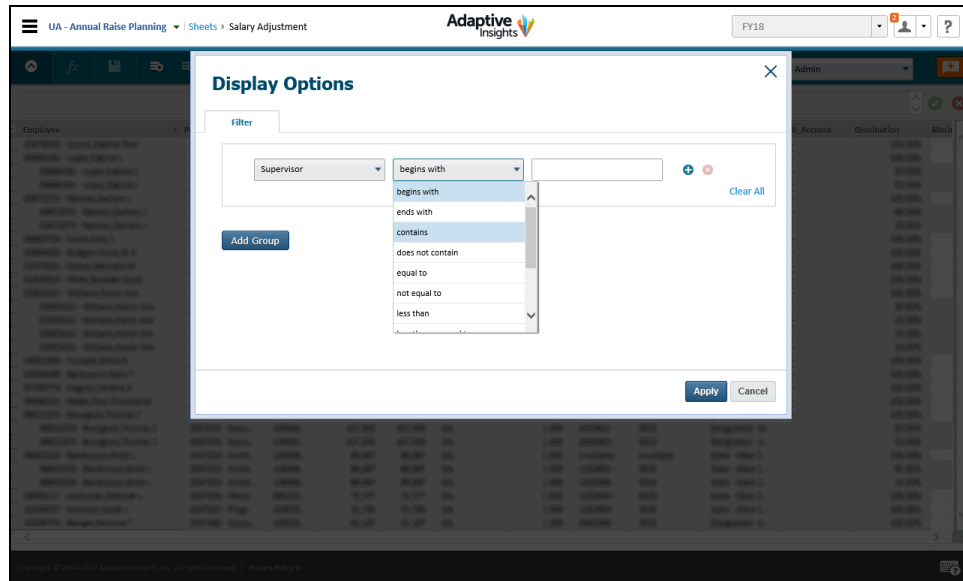
Step	Action
10.	<p>The Print icon downloads the data to Excel. Once the export is complete the information is in Excel and you can save, modify columns, print, etc.</p>
11.	<p>Use the Display Options filter your results.</p> <p><i>Note: Filtering can be helpful but is not required. You can always view results in the default view.</i></p> <p>Click the Display Options icon.</p> 




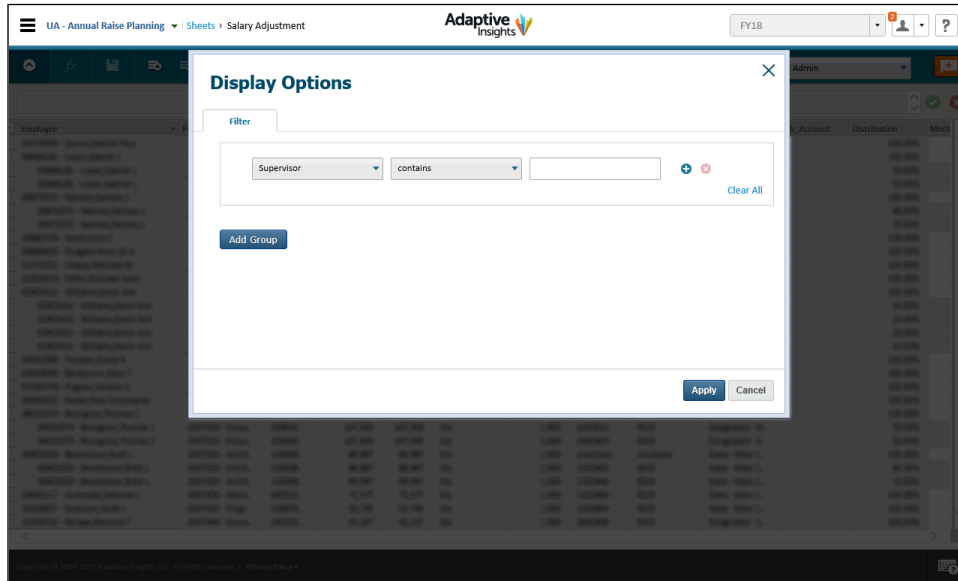
Step	Action
12.	Click the Select column drop-down list. <div style="border: 1px solid gray; padding: 2px; display: inline-block;">--Select column--</div>
13.	Click the Supervisor list item. <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Supervisor</div>



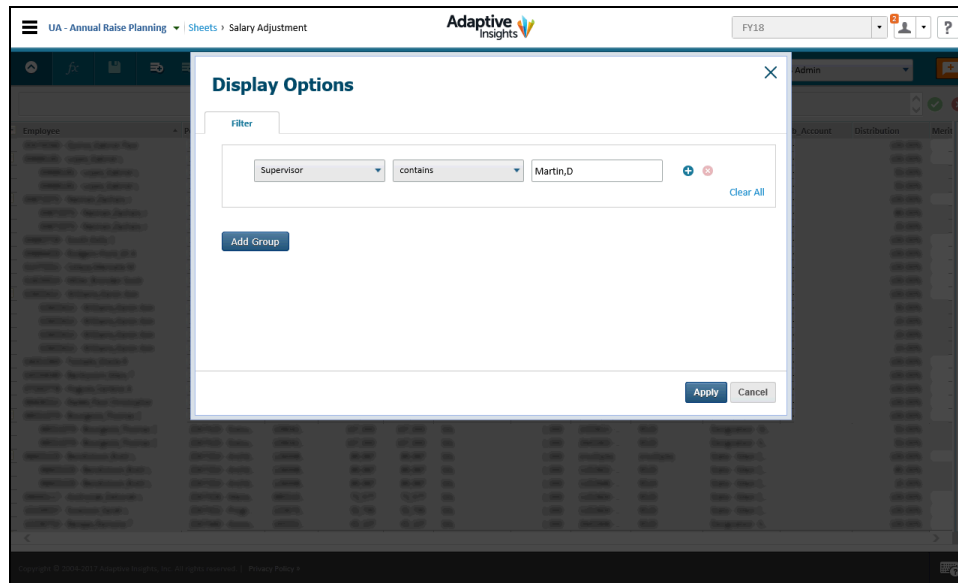
Step	Action
14.	Click the Select-operator drop-down list. 



Step	Action
15.	Both the Supervisor and Employee columns are listed by the Employee ID first, with the name behind it in the same field. If you don't know the EmplID, use the Search-operator field to search by name. Click the contains list item. 



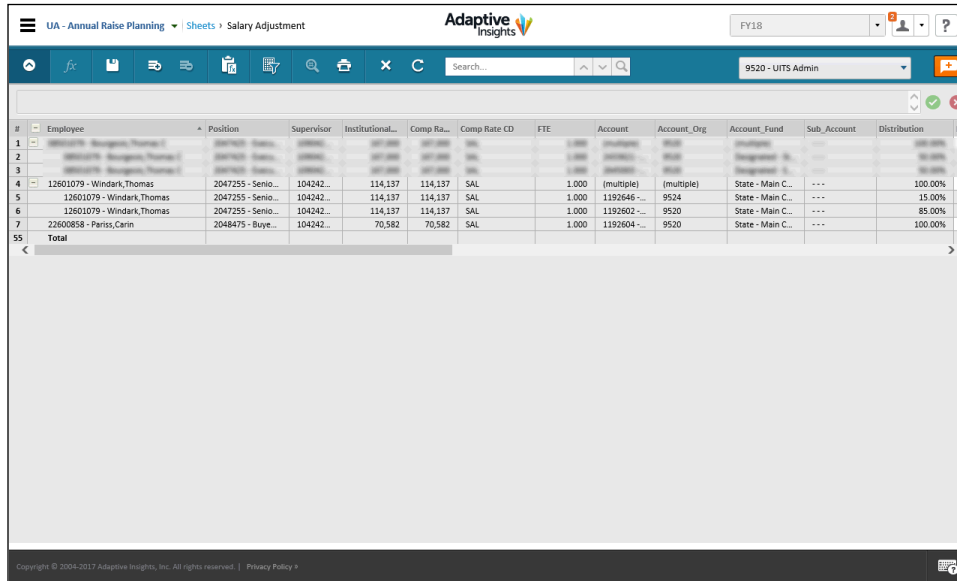
Step	Action
16.	Enter " Martin,D " in the text field.




Step	Action
17.	Notice that when you enter a name, there is not a space between the comma and first name.
18.	Click the Apply button.

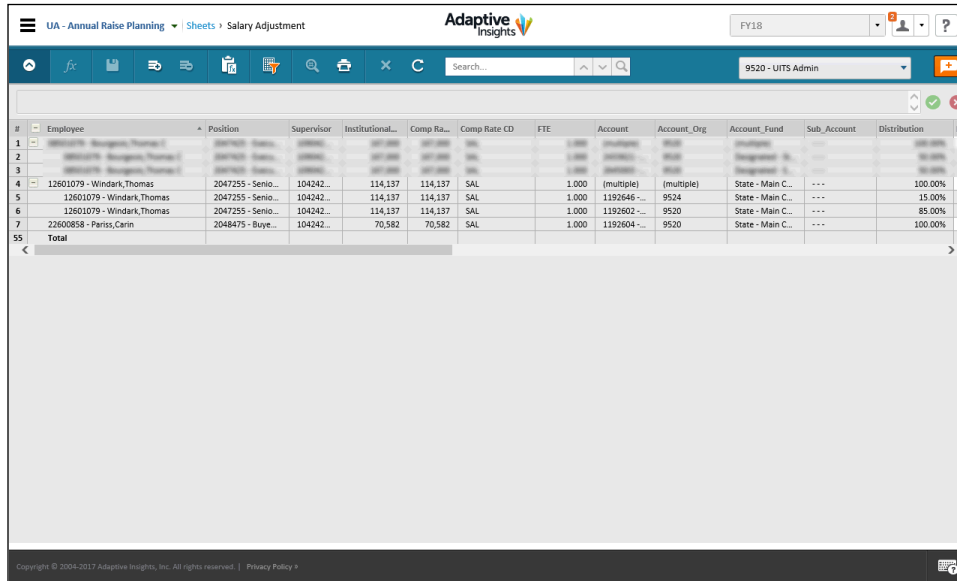


Step-by-Step Guide Annual Raise Planning




#	Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Mt
1	12601079 - Windark, Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
2	12601079 - Windark, Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192646...	9524	State - Main C...	---	15.00%	
3													
4	12601079 - Windark, Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192602...	9520	State - Main C...	---	85.00%	
5	12601079 - Windark, Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192604...	9520	State - Main C...	---	100.00%	
6	12601079 - Windark, Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192602...	9520	State - Main C...	---	85.00%	
7	22600858 - Paris, Carin	2048475 - Buye...	104242...	70,582	70,582	SAL	1,000	1192604...	9520	State - Main C...	---	100.00%	
55	Total												

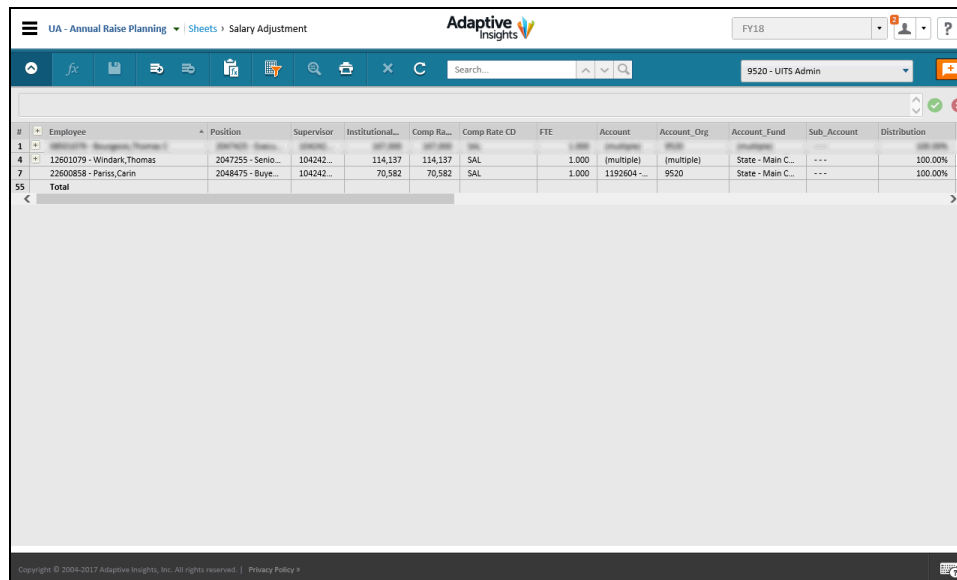
Step	Action
19.	<p>It is recommended you Save and save often.</p> <p>If you filter your results and don't want the system to default to those the next time you're in the application, you need to delete the filter and Save.</p> <p>Click the Save icon.</p> 
20.	<p>The application defaults to show all rows, including those with multiple rows for a single Employee.</p> <p>Multiple rows indicate an employee is split funded.</p> <p>In this example, look at the Account column for Thomas Windark, which shows the two different accounts tied to his salary.</p>



UA - Annual Raise Planning | Sheets | Salary Adjustment | Adaptive Insights | FY18 | 9520 - UIITS Admin

#	Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Mt
1	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
2	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192646...	9524	State - Main C...	---	15.00%	
3	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192602...	9520	State - Main C...	---	85.00%	
4	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
5	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192646...	9524	State - Main C...	---	15.00%	
6	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192602...	9520	State - Main C...	---	85.00%	
7	22600858 - Paris,Carin	2048475 - Buye...	104242...	70,582	70,582	SAL	1,000	1192604...	9520	State - Main C...	---	100.00%	
55	Total												


Step	Action
21.	<p>To hide the details on funding splits, click the minus sign in the Employee column to collapse all the multiple rows.</p> <p>Click the [-] icon.</p> 

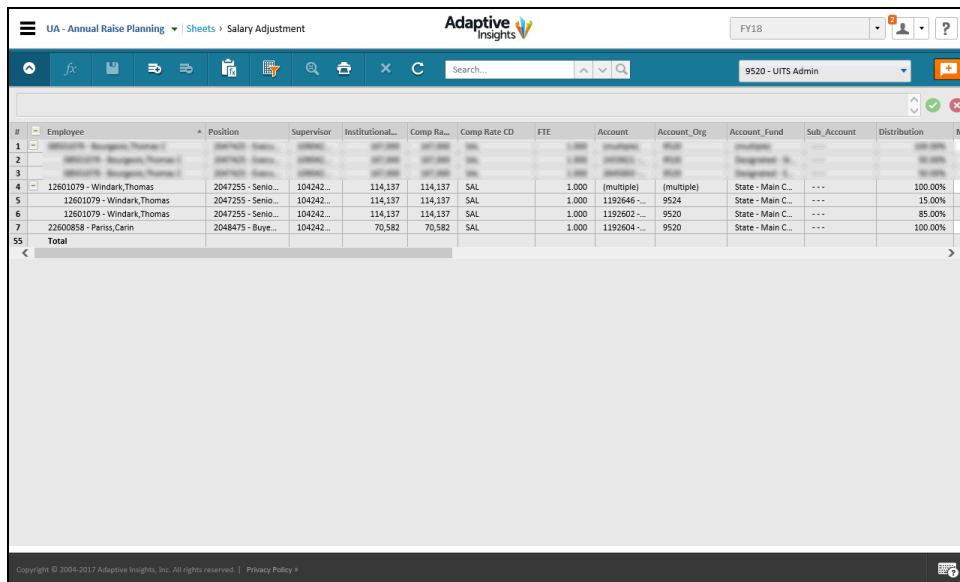


UA - Annual Raise Planning | Sheets | Salary Adjustment | Adaptive Insights | FY18 | 9520 - UIITS Admin

#	Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Mt
1	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
4	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192646...	9524	State - Main C...	---	15.00%	
7	22600858 - Paris,Carin	2048475 - Buye...	104242...	70,582	70,582	SAL	1,000	1192604...	9520	State - Main C...	---	100.00%	
55	Total												

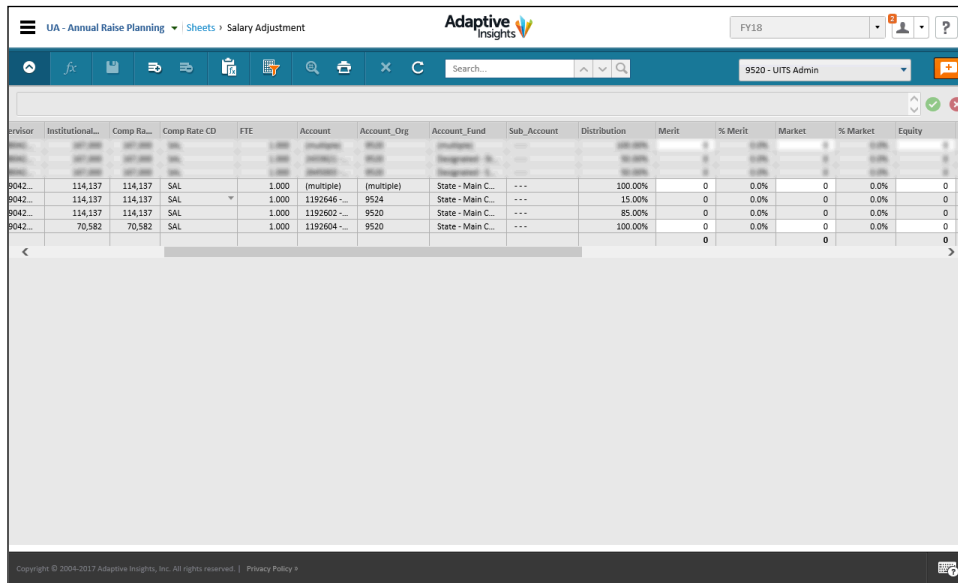
Step-by-Step Guide Annual Raise Planning

Step	Action
22.	<p>The plus sign expands the rows again.</p> <p>Click the [+] icon.</p> 



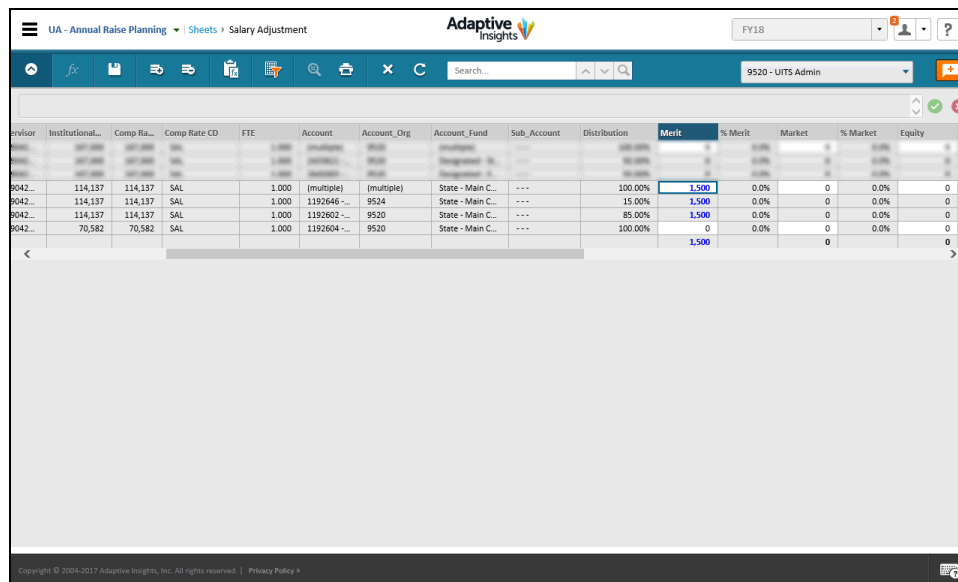
#	Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Mi
1	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
2	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192646 - ...	9524	State - Main C...	---	15.00%	
3	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192602 - ...	9520	State - Main C...	---	85.00%	
4	12601079 - Windark,Thomas	2047255 - Senio...	104242...	114,137	114,137	SAL	1,000	1192604 - ...	9520	State - Main C...	---	100.00%	
5	22600858 - Paris,Carin	2048475 - Buye...	104242...	70,582	70,582	SAL	1,000						
6	Total												

Step	Action
23.	<p>Use the scrollbar located at the bottom of the table to view more columns and data in the table.</p> <p>Click the scrollbar.</p>
24.	<p>The only editable fields are Merit, Market, Equity, and Notes.</p> <p>All increases will follow a workflow approval path.</p>



Advisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Merit	% Merit	Market	% Market	Equity	%
9042...	114.137	114.137	SAL	1.000	(multiple)	(multiple)	State - Main C...	---	100.00%	0	0.0%	0	0.0%	0	0
9042...	114.137	114.137	SAL	1.000	1192646...	9524	State - Main C...	---	15.00%	0	0.0%	0	0.0%	0	0
9042...	114.137	114.137	SAL	1.000	1192602...	9520	State - Main C...	---	85.00%	0	0.0%	0	0.0%	0	0
9042...	70.582	70.582	SAL	1.000	1192604...	9520	State - Main C...	---	100.00%	0	0.0%	0	0.0%	0	0

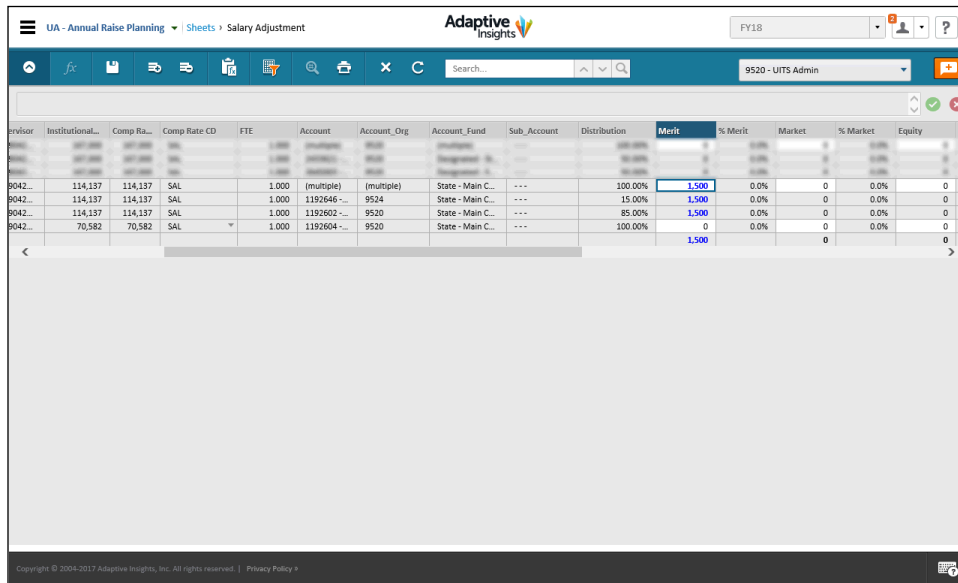
Step	Action
25.	Enter the dollar amount of the Merit increase into that column. Enter " 1000 " in the Merit field.



Advisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Merit	% Merit	Market	% Market	Equity	%
9042...	114.137	114.137	SAL	1.000	(multiple)	(multiple)	State - Main C...	---	100.00%	1,500	0.0%	0	0.0%	0	0
9042...	114.137	114.137	SAL	1.000	1192646...	9524	State - Main C...	---	15.00%	1,500	0.0%	0	0.0%	0	0
9042...	114.137	114.137	SAL	1.000	1192602...	9520	State - Main C...	---	85.00%	1,500	0.0%	0	0.0%	0	0
9042...	70.582	70.582	SAL	1.000	1192604...	9520	State - Main C...	---	100.00%	0	0.0%	0	0.0%	0	0

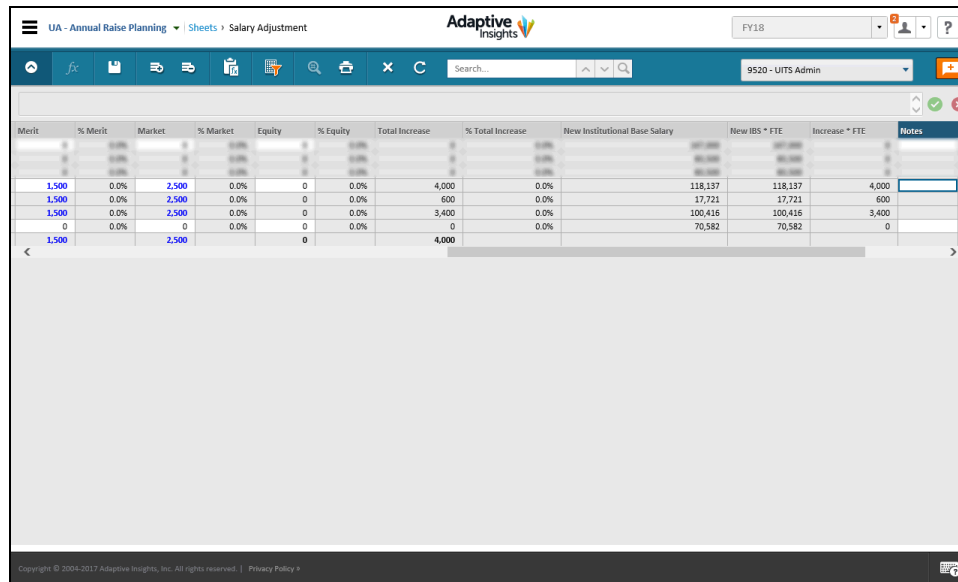
Step	Action
26.	Any fields or entries in blue indicate that information hasn't been. Note: Notice that the rest of the fields in the column automatically populate.

Step-by-Step Guide Annual Raise Planning



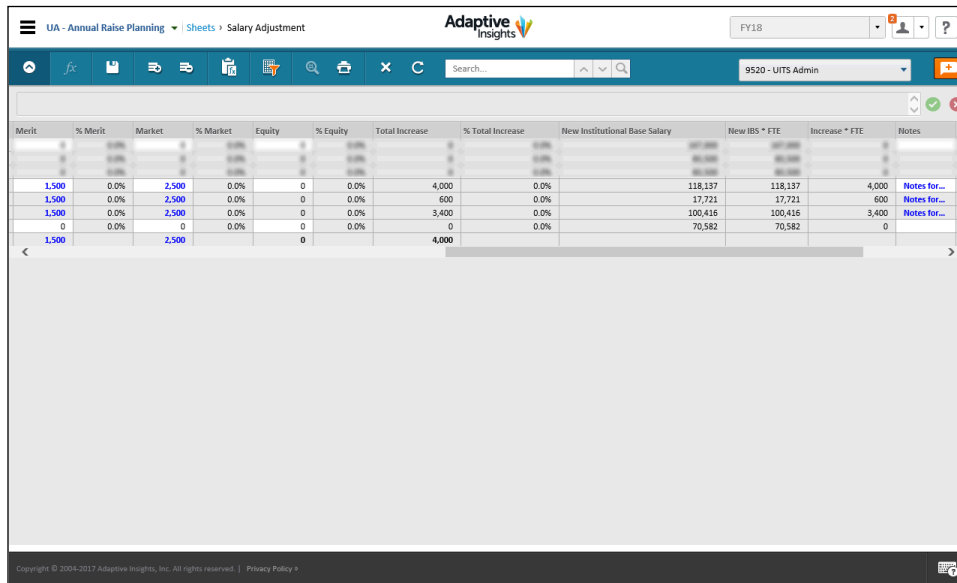
Advisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Merit	% Merit	Market	% Market	Equity
9042...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	1,500	0.0%	0	0.0%	0
9042...	114,137	114,137	SAL	1,000	1192646...	9524	State - Main C...	---	15.00%	1,500	0.0%	0	0.0%	0
9042...	114,137	114,137	SAL	1,000	1192602...	9520	State - Main C...	---	85.00%	1,500	0.0%	0	0.0%	0
9042...	70,582	70,582	SAL	1,000	1192604...	9520	State - Main C...	---	100.00%	0	0.0%	0	0.0%	0
										1,500		0		

Step	Action
27.	Enter "2500" in the Market field.




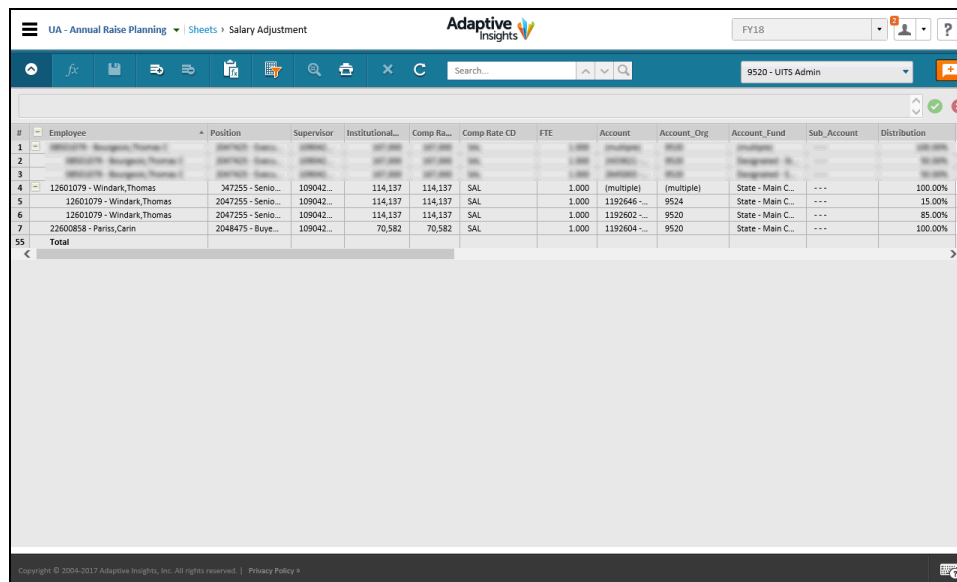
Merit	% Merit	Market	% Market	Equity	% Equity	Total Increase	% Total Increase	New Institutional Base Salary	New IBS * FTE	Increase * FTE	Notes
1,500	0.0%	2,500	0.0%	0	0.0%	4,000	0.0%	118,137	118,137	4,000	
1,500	0.0%	2,500	0.0%	0	0.0%	600	0.0%	17,721	17,721	600	
1,500	0.0%	2,500	0.0%	0	0.0%	3,400	0.0%	100,416	100,416	3,400	
0	0.0%	0	0.0%	0	0.0%	0	0.0%	70,582	70,582	0	
1,500		2,500		0		4,000					

Step	Action
28.	Enter "Notes for approvers" in the Notes field.




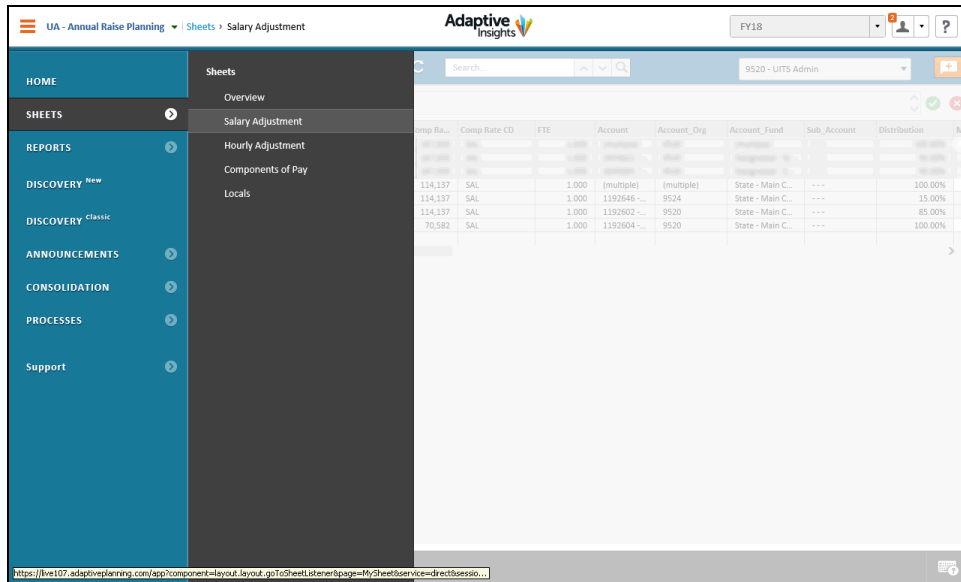
Merit	% Merit	Market	% Market	Equity	% Equity	Total Increase	% Total Increase	New Institutional Base Salary	New IBS * FTE	Increase * FTE	Notes
1,500	0.0%	2,500	0.0%	0	0.0%	4,000	0.0%	118,137	118,137	4,000	Notes for...
1,500	0.0%	2,500	0.0%	0	0.0%	600	0.0%	17,721	17,721	600	Notes for...
1,500	0.0%	2,500	0.0%	0	0.0%	3,400	0.0%	100,416	100,416	3,400	Notes for...
0	0.0%	0	0.0%	0	0.0%	0	0.0%	70,582	70,582	0	
1,500		2,500		0		4,000					


Step	Action
29.	Click the Save icon. 
30.	You can save and come back to the sheets as often as necessary during the timeframe given to enter and submit the data. Note: The percent (%) columns for Merit, Market, and Equity auto-calculate when you save the sheet.

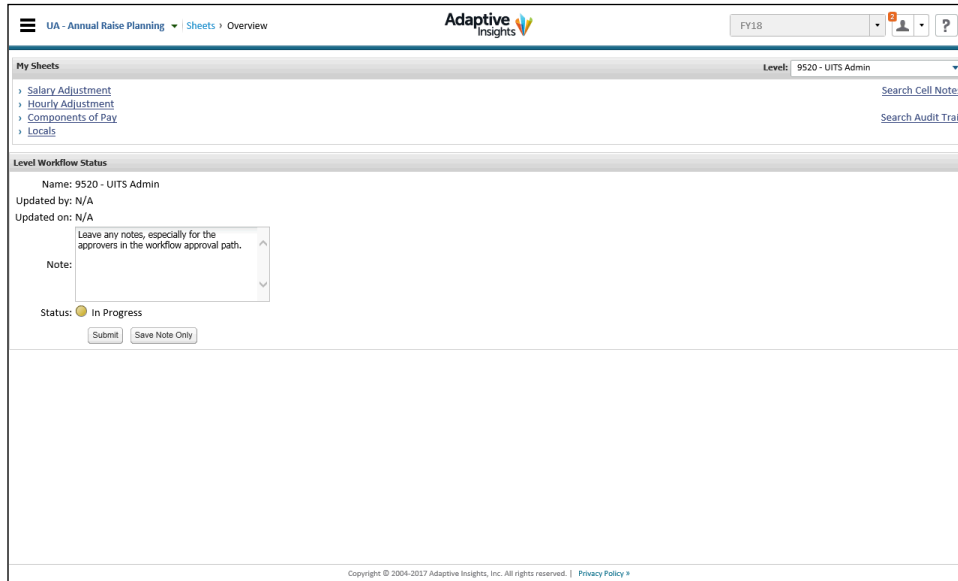


#	Employee	Position	Supervisor	Institutional...	Comp Ra...	Comp Rate CD	FTE	Account	Account_Org	Account_Fund	Sub_Account	Distribution	Mt
1	12601079 - Windark,Thomas	2047255 - Senio...	109042...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
2	12601079 - Windark,Thomas	2047255 - Senio...	109042...	114,137	114,137	SAL	1,000	1192646 -	9524	State - Main C...	---	15.00%	
3	12601079 - Windark,Thomas	2047255 - Senio...	109042...	114,137	114,137	SAL	1,000	1192602 -	9520	State - Main C...	---	85.00%	
4	12601079 - Windark,Thomas	2047255 - Senio...	109042...	114,137	114,137	SAL	1,000	(multiple)	(multiple)	State - Main C...	---	100.00%	
5	12601079 - Windark,Thomas	2047255 - Senio...	109042...	114,137	114,137	SAL	1,000	1192646 -	9524	State - Main C...	---	15.00%	
6	12601079 - Windark,Thomas	2047255 - Senio...	109042...	114,137	114,137	SAL	1,000	1192602 -	9520	State - Main C...	---	85.00%	
7	22600858 - Pariss,Carin	2048475 - Buye...	109042...	70,582	70,582	SAL	1,000	1192604 -	9520	State - Main C...	---	100.00%	
55	Total												

Step	Action
31.	<p>Once you've completed all changes you need to submit the document so that it can begin routing through the approval process.</p> <p>Point to the Navigation Menu icon.</p> 



Step	Action
32.	<p>To access the page with the Submit button, this time you need to click on SHEETS instead of hovering over the arrow.</p> <p>Click the Sheets link.</p> 



UA - Annual Raise Planning | Sheets | Overview
 Adaptive Insights
 FY18
 Level: 9520 - UITS Admin
 My Sheets
 > Salary Adjustment
 > Hourly Adjustment
 > Components of Pay
 > Locals
 Search Cell Notes
 Search Audit Trail
 Level Workflow Status
 Name: 9520 - UITS Admin
 Updated by: N/A
 Updated on: N/A
 Note:
 Leave any notes, especially for the approvers in the workflow approval path.
 Status: ● In Progress
 Submit Save Note Only
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Step	Action
33.	<p>The My Sheets section has another way to access the Salary Adjustment, as well as links to the Hourly Adjustment and Components of Pay.</p> <p>In the Level Workflow Status section enter any applicable or relevant notes.</p>
34.	<p>At this point you can either Save Note Only (if you're not ready to Submit yet) or Submit.</p> <p>Once you Submit, you are no longer able to edit the Annual Raise Planning.</p> <p>Click the Submit button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Submit</div>
35.	<p>Once submitted this document routes through several levels of approvals.</p> <p>After all approvals are made, the information on Merit increases only will be automatically loaded into UAccess Employee.</p> <p>Note: <i>Market and Equity increases go through the electronic approval path but, once approved, those need loaded into UAccess Employee manually.</i></p>