Labor Distributions
HR FRONT END TRAINING
HOW-TO GUIDE

URBANA-CHAMPAIGN   CHICAGO   SPRINGFIELD

UNIVERSITY OF ILLINOIS SYSTEM

Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

Copyright

Trademarks

Banner® is a trademark of Ellucian Company L.P. or its affiliates and is registered in the U.S and other countries.

Course Information

Course ID: Labor Distributions

Revision Date: October 10, 2020

Version: 1.0

<table>
<tr><td>APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION</td></tr>
<tr><td><i>Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.</i></td></tr>
<tr><td>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.</td></tr>
</table>

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

This guide will help you understand and process Labor Distributions transactions in the HR Front End. It includes an explanation of the Labor Distributions transaction and gives general guidelines about when it is appropriate to use the Labor Distributions transaction type. It also provides instructions on how to complete Labor Distributions transactions.

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

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 in- line 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.

Figure 4: Updated Labor Distribution Using the Inline Method

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%.

Figure 5: Adding a Labor Distribution

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.

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.

Figure 9: Success Applying Message

Labor Distribution Change Process Flow

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

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

THIS PAGE INTENTIONALLY LEFT BLANK

Appendix A: Screenshots from HRFE Video
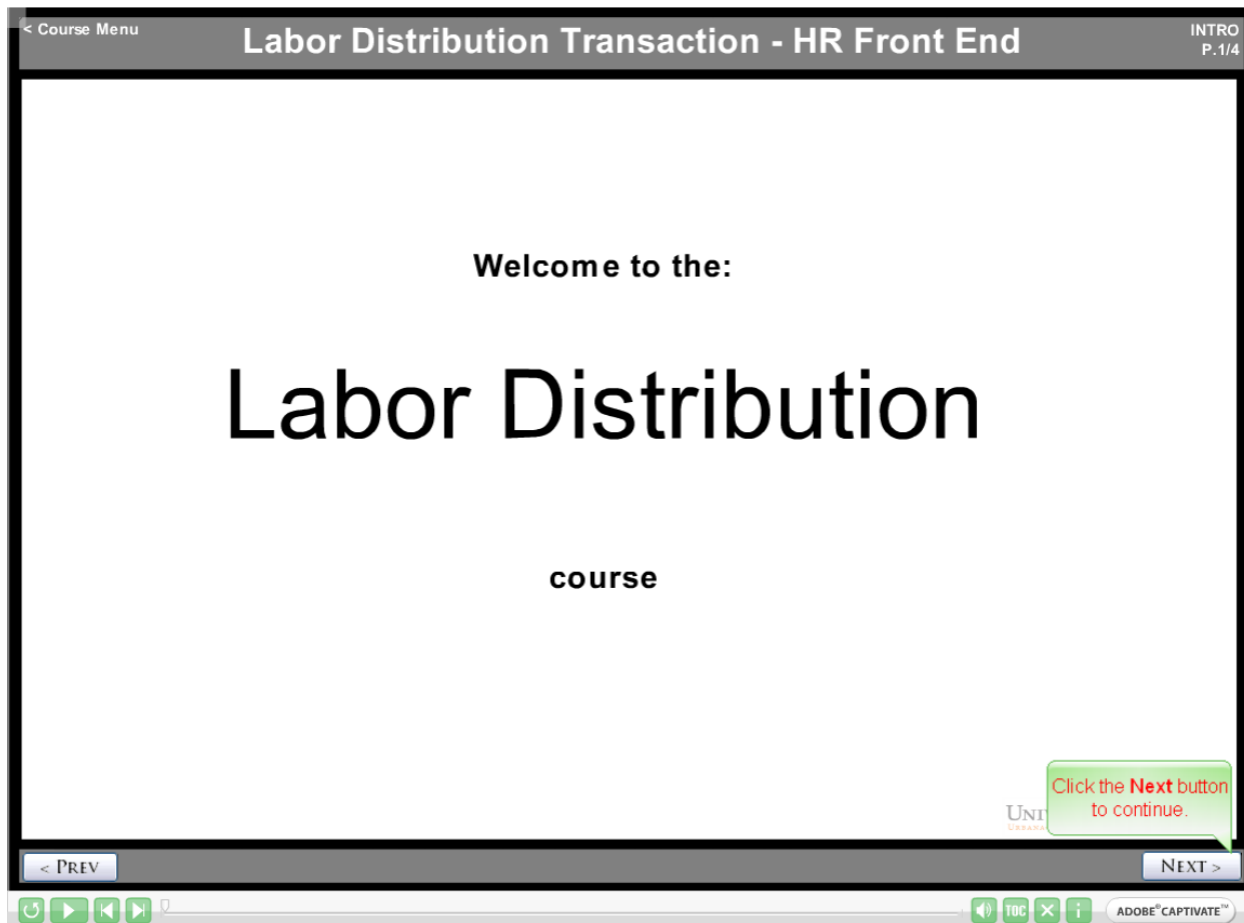
This course will help to equip you when working with Labor Distribution transactions in the HR Front End Application.

CHAPTER	YOU WILL LEARN ABOUT
1 – Common Terminology	• Common Terminology • What a Labor Distribution transaction is • Labor Distribution Quick View
2 – Initiating a Labor Distribution Transaction	• How to enter the appropriate view date • How to initiate a Labor Distribution transaction • How to expand the appropriate accordions
3 – Updating an Exsisting Labor Distribution using the Drop-Down Menus	• How to edit Labor Distributions using the drop-down menus • How to update the fields • How to save
4 – Updating an Existing Labor Distribution using the Inline Method	• How to edit Labor Distributions using the inline method • How to update the fields • How to save
5 – Adding a Labor Distribution	• How to add a Labor Distribution • How to populate each field • How to save
6 – Removing a Labor Distribution	• How to Remove a Labor Distribution • How to save
7 – Routing and Applying a Labor Distribution Transaction	• How to route the transaction • How to apply the transaction
8 – Course Review	• You will participate in activities that will assess your understanding of the content covered in this course

UNI

Click the **Next** button to continue.

< PREV

NEXT >

ADOBE®CAPTIVATE™

Labor Distribution Transaction - HR Front End

Appropriate Use and Security of Confidential and Sensitive Information

Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.

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

Click the **Next** button to continue.

< PREV

NEXT >

ADOBE®CAPTIVATE™

Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What a Labor Distribution transaction is
- Labor Distribution Quick View

Click the **Next** button to continue.
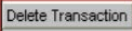
< PREV   NEXT >

Labor Distribution Transaction - Button Functionality

BUTTON	FUNCTIONALITY
Apply	The **Apply** feature completes the transaction and applies the data to Banner. The User must have **Apply** permissions for this button to be active
Close	The **Close** button enables the user to exit the transaction.
Continue	The **Continue** button is used to proceed through the screens of a Wizard
Delete Transaction	The **Delete Transaction** button is used to delete a transaction from the system.
Print Friendly View	The **Print Friendly View** button opens a separate window that will align the data from the current screen in a format that can be easily printed.
Route	The **Route** feature sends the transaction on to the next stop in the predetermined routing for the transaction.
Save	The **Save** button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User's Inbox (My Inbox)
Send To	The **Send To** feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.

Click the **Next** button to continue.

UNI

< PREV

NEXT >

ADOBE®CAPTIVATE™

What is a 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.

Labor Redistributions will still need to be done through Banner.

Click the **Next** button to continue.

< PREV   NEXT >

ADOBE®CAPTIVATE™

Labor Distribution 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.

Click the **Next** button to continue.

< PREV   NEXT >

ADOBE®CAPTIVATE™

Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What a Labor Distribution transaction is
- Labor Distribution Quick View

Click the **Next** button
to continue.

< PREV

NEXT >

Chapter 2

Initiating a Labor Distribution Transaction

In this Chapter, you will learn:

- How to enter the appropriate view date
- How to initiate a Labor Distribution transaction
- How to expand the appropriate accordions

Click the **Next** button to continue.

< PREV   NEXT >

Employee Record View   🏠 HOME   🔍 EMPLOYEE SEARCH   📋 IN/OUTBOXES   📄 TRANSACTIONS ▼   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   **651234567**   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:No Transaction:Readonly:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   [View]   Limited ERV   Timeline View

| GENERAL INFO | | ATTACHMENTS | AUDIT TRAIL |

EMPLOYEE GENERAL

Enter 1/1/2010 in the **Date** field and click **View.**

Print Friendly View

JOBS

Expand All

▶ **U82205-00:** OFFICE SUPPORT SPEC (LU)   **ECLS:** CA   **TS ORG:** 1-418001   **TYPE:** P   **FTE:** 1.000   **HRLY:** 22.169000   **BEGIN:** 12/21/2003   **BGT PRO:** R   **STATUS:** A

Print Friendly View

> x
>
> 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.

< PREV   NEXT >

Employee Record View 🏠 HOME 👥 EMPLOYEE SEARCH 📨 IN/OUTBOXES 📋 TRANSACTIONS ▼ 👥 ADMIN TOOLS ▼ ❓ HELP ⏻ LOGOUT

Navigation Section

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base S   43,229.68
Full View:No Transaction:Readonly:BioDemoAccess:JobAccess=[U82205-00]

Transaction History
Initiate New Hire
Position Creation and Maintenance
Employee Job Record Change
Labor Distributions
Historical Job Change
Reappoint/Reactivate Job
Add a Job
Separation
Employee Data
Job End Date

DATE: 1/1/2010   [View]   imited ERV   Timeline View

GENERAL INFO   BIO / DEMO   MEMOS   ATTACHMENTS   AUDIT TRAIL

EMPL...   [Print Friendly View]

You are now viewing this person as of 1/1/2010.

To initiate the transaction click Labor Distributions from the Transactions menu.

Expand All

U82205-00: OFFICE SUPPORT SPEC (LU) ECLS: CA TS ORG: 1-418001 TYPE: P FTE: 1.000 HRLY: 22.   ): R STATUS: A

[Print Friendly View]

< PREV   NEXT >

⟳ ▶ ◀ ▶| ▽   🔊 TOC ✕ ⓘ   ADOBE®CAPTIVATE™

Employee Record View

🏠 HOME   🔍 EMPLOYEE SEARCH   📧 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   View   Limited ERV   Timeline View

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

▶ EMPLOYEE GENERAL INFORMATION

Save Cancel   Print Friendly View

JOBS

Expand All

▶ U82205-00: OFFICE SUPPORT SPEC (LU)   ECLS: CA   TS ORG: 1-418001   TYPE: P   FTE: 1.000   HRLY: 22.169000   BEGIN: 12/21/2003   BGT PRO: R   STATUS: A

Save Cancel   Print Friendly View

Under the Jobs tab, click the accordion bar of the job you wish to edit.

< PREV   NEXT >

🔄 ⏸ ⏮ ⏭ ————————○—————————   🔊 TOC ✕ ℹ   ADOBE®CAPTIVATE™

Employee Record View

🏠 HOME   👥 EMPLOYEE SEARCH   📥 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 11/1/2010   [View]   [Limited ERV] [Timeline View]

| Comments | UserID | Date |

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		100010	418001	213320	418004			7/1/2009	100.00	43229.68	Update
										TOTALS	100.00	43229.68	

[Add]

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

[Save] [Cancel]   [Print Friendly View]

Both the Job Labor Distribution and the Position Labor Distribution are editable and the same changes can be made.

At this point, users will have 3 different options:

- **Edit** the Labor Distribution

- **Remove** the Labor Distribution

- **Add** a new Labor Distribution

Click the **Next** button to continue.

[< PREV]   [NEXT >]

ADOBE® CAPTIVATE™

Chapter 2 Review

In this Chapter, you have learned:

- How to enter the appropriate view date
- How to initiate a Labor Distribution transaction
- How to expand the appropriate accordions

Click the **Next** button to continue.

< PREV   NEXT >

Chapter 3
Updating an Existing Labor Distribution using the Drop-Down Menus

In this Chapter, you will learn:

- How to edit Labor Distributions using the drop-down menus
- How to update the fields
- How to save

Click the **Next** button to continue.

< PREV   NEXT >

ADOBE®CAPTIVATE™

Labor Distribution Transaction - HR Front End

Employee Record View

🏠 HOME   🔍 EMPLOYEE SEARCH   📧 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 11/1/2010   View   Limited ERV   Timeline View

Comments	UserID	Date

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		100010	418001	213320	418004			7/1/2009	100.00	43229.68	Update
										TOTALS	100.00	43229.68	

To edit the Labor Distributions using the drop-down menus click **Edit.**

POS...

WORK SCHEDULES

SERVICE DATES & CONTRACT PARAMETERS

DEFAULT EARNINGS

FACULTY RANK & TENURE

x

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 in-line 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.

Save   Cancel   Print Friendly View

< PREV	NEXT >

🔄 ▶ ⏮ ⏭   🔊 TOC ✖ ℹ   ADOBE® CAPTIVATE™

Labor Distribution Transaction - HR Front End

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Acti
Edit	Remove	1		100010	418001	213320	418004	

Close

COA: 1 - University of Illinois - Urbana

Index:

Fund: 200100   100010 - 103 FY10 GRF/IF General Funds

Organization: 418001   418001 - Bureau Admin

Account: 213300   213320 - Staff Secretarial Salary

Program: 418004   418004 - Faculty Fellows

Activity:

Location:

Effective Date: 11/1/2010

Percent: 100.00

Salary: 43229.68

Add   Update

Enter 200100 in the Fund field and enter 213300 in the Account field
Then click Update.

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.

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.

< PREV   NEXT >

Labor Distribution Transaction - HR Front End

Employee Record View

🏠 HOME   👥 EMPLOYEE SEARCH   📬 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   [View]   Limited ERV | Timeline View

🔽 JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		200100 / 100010	418001	213300 / 213320	418004			1/1/2010 / 7/1/2009	100.00	43229.68	Update
										TOTALS	100.00	43229.68	

[Add]

▶ POSITION DATA

▶ WORK SCHEDULES

RACT PARAMETERS

> **Click Save.**

> 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 entered in the view date field.   ✕

[Save] [Cancel]   [Print Friendly View]

< PREV   NEXT >

⟳ ▶ ◀ ▶| 🔊 TOC ✕ ℹ️   ADOBE®CAPTIVATE™

Labor Distribution Transaction - HR Front End

Employee Rec... | OUTBOXES | 📄 TRANSACTIONS ▼ | 👥 ADMIN TOOLS ▼ | ❓ HELP | ⏻ LOGOUT

Doe, John
Full View:Transact...
ORG:Default:Initiat...

FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
mpleted:Editable:BioDemoAccess:JobAccess=[U82205-00], Stop:

DATE: 1/1/2010

Limited ERV | Timeline View

You will now see the Labor Distribution component in the **Proposed Changes** accordion. If you have multiple components click the view link to view the change.

☑ PROPOSED CHANGES

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View	194650	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	Delete	

Add Change

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

☑ EMPLOYEE GENERAL INFORMATION

Route | Save | Cancel   Release Ownership | Send To | Send FYI | Print Friendly View

JOBS

Expand All

☑ **U82205-00:** OFFICE SUPPORT SPEC (LU)   **ECLS:** CA   **TS ORG:** 1-418001   **TYPE:** P   **FTE:** 1.000   **HRLY:** 22.169000   **BEGIN:** 12/21/2003   **BGT PRO:** R   **STATUS:** A

Route | Save | Cancel   Release Ownership | Send To | Send FYI | Print Friendly View

Click the **Next** button to continue.

< PREV

NEXT >

ADOBE®CAPTIVATE™

Chapter 3 Review

In this Chapter, you have learned:

- How to edit Labor Distributions using the drop-down menus
- How to update the fields
- How to save

Click the **Next** button to continue.

< PREV

NEXT >

Chapter 4

Updating an Existing Labor Distribution using the Inline Method

In this Chapter, you will learn:

- How to edit Labor Distributions using the inline method
- How to update the fields
- How to save

Click the **Next** button to continue.

< PREV   NEXT >

Employee Record View

HOME   EMPLOYEE SEARCH   IN/OUTBOXES   ADMIN TOOLS ▼   HELP   LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 11/1/2010   View   Limited ERV   Timeline View

Comments   UserID   Date

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1			418001		418004			7/1/2009	100.00	43229.68	Update
										TOTALS	100.00	43229.68	

Add

Enter **200100** in the Fund field and
213300 in the Account field.
Then click **Update.**

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

x

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.

Save   Cancel   Print Friendly View

< PREV   NEXT >

ADOBE CAPTIVATE

Labor Distribution Transaction - HR Front End

Employee Record View

🏠 HOME   🔍 EMPLOYEE SEARCH   📧 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   **651234567**   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   [View]   [Limited ERV] [Timeline View]

▼ JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		200100 100010	418001	213300 213320	418004			1/1/2010 7/1/2009	100.00	43229.68	Update
										TOTALS	100.00	43229.68	

[Add]

▶ POSITION DATA

▶ WORK SCHEDULES

▶ ...ACT PARAMETERS

Click Save.

> 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 entered in the view date field.

[Save] [Cancel]   [Print Friendly View]

[< PREV]   [NEXT >]

ADOBE® CAPTIVATE™

Employee Reco_____ OUTBOXES   TRANSACTIONS ▼   ADMIN TOOLS ▼   ? HELP   ⏻ LOGOUT

Doe, John   FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68   x

Full View:Transac_____ mpleted:Editable:BioDemoAccess:JobAccess=[U82205-00], Stop:
ORG:Default:Initia_____

DATE: 1/1/2010   Limited ERV   Timeline View

*You will now see the Labor Distribution component in the **Proposed Changes** accordion. If you have multiple components click the view link to view the change.*

◆ PROPOSED CHANGES

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View	194650	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	Delete	

Add Change

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

◆ EMPLOYEE GENERAL INFORMATION

Route   Save   Cancel   Release Ownership   Send To   Send FYI   Print Friendly View

JOBS

Expand All

◆ U82205-00: OFFICE SUPPORT SPEC (LU)   **ECLS:** CA   **TS ORG:** 1-418001   **TYPE:** P   **FTE:** 1.000   **HRLY:** 22.169000   **BEGIN:** 12/21/2003   **BGT PRO:** R   **STATUS:** A

Route   Save   Cancel   Release Ownership   Send To   Send FYI   Print Friendly View

*Click the **Next** button to continue.*

< PREV   NEXT >

ADOBE® CAPTIVATE™

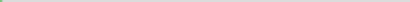# Chapter 4 Review

In this Chapter, you have learned:

- How to edit Labor Distributions using the inline method
- How to update the fields
- How to save

Click the **Next** button to continue.

< PREV

NEXT >

ADOBE®CAPTIVATE™

Chapter 5

Adding a Labor Distribution

In this Chapter, you will learn:

- How to add a Labor Distribution
- How to populate each field
- How to save

Click the **Next** button to continue.

< PREV

NEXT >

Labor Distribution Transaction - HR Front End

Employee Record View

🏠 HOME   👥 EMPLOYEE SEARCH   📧 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 11/1/2010   [View]

Limited ERV   Timeline View

| Comments | UserID | Date |

🔽 **JOB LABOR DISTRIBUTIONS**

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		100010	418001	213320	418004			7/1/2009	100.00	43229.68	Update
										TOTALS	100.00	43229.68	

[Add]

▶ POS
▶ WO
▶ SER

To add another Labor Distribution, click **Add.**

After completing the same steps in Chapter 2, you are ready to add a Labor Distribution.

DEFI
FACULTY RANK & TENURE

[Save] [Cancel]

[Print Friendly View]

[< PREV]   [NEXT >]

ADOBE® CAPTIVATE™

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Acti
Edit	Remove	1		100010	418001	213320	418004	

Close

COA: 1 - University of Illinois - Urbana
Index:
Fund:
Organization:
Account:
Program:
Activity:
Location:
Effective Date: 1/1/2010
Percent:
Salary: 0.00
Add   Update

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.

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

Enter the following in each field:
Fund: **200100**
Orgination: **418001**
Account: **213300**
Program: **418004**
Percent: **50**

Then click **Add.**

< PREV   NEXT >

ADOBE®CAPTIVATE™

Employee Record View

HOME   EMPLOYEE SEARCH   IN/OUTBOXES   ADMIN TOOLS ▼   HELP   LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   View   Limited ERV   Timeline View

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		100010	418001	213320	418004			1/1/2010	50.00	21614.84	Update
										7/1/2009	100.00	43229.68	
Edit	Remove	1		200100	418001	213300	418004			1/1/2010	50.00	21614.84	Update
								TOTALS			100.00	43229.68	

Add

POSITION DATA

WOR

SER   Click Save.   ARAMETERS

DEF/

FAC

There are now two rows. Note that the new values display in red. Effective date is updated to match the date entered in the view date field. Remember if you are adding a new Labor Distribution you must also edit the percent for the existing Labor Distribution. Together they must equal 100 Percent.

Save   Cancel   Print Friendly View

< PREV   NEXT >

ADOBE® CAPTIVATE™

Labor Distribution Transaction - HR Front End

Employee Rec...

OUTBOXES 📄 TRANSACTIONS ▼ 👥 ADMIN TOOLS ▼ ❓ HELP ⏻ LOGOUT

Doe, John
Full View:Transact...
ORG:Default:Initiat...

FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
...mpleted:Editable:BioDemoAccess:JobAccess=[U82205-00], Stop:

DATE: 1/1/2010

Limited ERV | Timeline View

You will now see the Labor Distribution component in the Proposed Changes accordion. If you have multiple components click the view link to view the change.

○ PROPOSED CHA...

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View	194650	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	Delete	

Add Change

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

○ EMPLOYEE GENERAL INFORMATION

Route | Save | Cancel

Release Ownership | Send To | Send FYI | Print Friendly View

JOBS

Expand All

○ **U82205-00:** OFFICE SUPPORT SPEC (LU)   **ECLS:** CA   **TS ORG:** 1-418001   **TYPE:** P   **FTE:** 1.000   **HRLY:** 22.169000   **BEGIN:** 12/21/2003   **BGT PRO:** R   **STATUS:** A

Route | Save | Cancel

Release Ownership | Send To | Send FYI | Print Friendly View

Click the Next button to continue.

< PREV

NEXT >

ADOBE® CAPTIVATE™

Chapter 5 Review

In this Chapter, you have learned:

- How to add a Labor Distribution
- How to populate each field
- How to save

Click the **Next** button to continue.

< PREV

NEXT >

ADOBE®CAPTIVATE™

Chapter 6
Removing a Labor Distribution

In this Chapter, you will learn:

- How to Remove a Labor Distribution
- How to save

Click the **Next** button
to continue.

< PREV   NEXT >

ADOBE®CAPTIVATE™

Employee Record View   🏠 HOME   🔍 EMPLOYEE SEARCH   📧 IN/OUTBOXES   🔧 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   [View]   [Limited ERV] [Timeline View]

JOB COMMENTS

Comments	UserID	Date
Labor distribution change.	sandrsn	12-4-2009 09:26:56

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		100010	418001	213320	418004			1/1/2010	50.00	21614.84	Update
Edit	Remove	1		200100	418001	213300	418004			1/1/2010	50.00	21614.84	Update
										TOTALS	100.00	43229.68	

[Add]

> To remove a Labor Distribution, click **Remove.**

▶ POSITION
▶ WORK SCH
▶ SERVICE DATES & CONTRACT PARAMETERS
   DEFAULT EARNINGS
   FACULTY RANK & TENURE

[Save] [Cancel]   [Print Friendly View]

[< PREV]   [NEXT >]

ADOBE® CAPTIVATE™

Labor Distribution Transaction - HR Front End

Employee Record View

🏠 HOME   🔍 EMPLOYEE SEARCH   📧 IN/OUTBOXES   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68

Full View:New Transaction=LD:Editable:BioDemoAccess:JobAccess=[U82205-00]

DATE: 1/1/2010   [View]   [Limited ERV] [Timeline View]

JOB COMMENTS

Comments	UserID	Date
Labor distribution change.	sandrsn	12-4-2009 09:26:56

JOB LABOR DISTRIBUTIONS

		COA	Index	Fund	Organization	Account	Program	Activity	Location	Eff Date	Percent	Salary	
Edit	Remove	1		100010	418001	213320	418004			1/1/2010	100.00 / 50.00	43229.68 / 21614.84	Update
										TOTALS	100.00	43229.68	

[Add]

Click Save.

Note that the new values display in red. Effective date is updated to match the date entered in the view date field.

...CT PARAMETERS

FACULTY RANK & TENURE

[Save] [Cancel]   [Print Friendly View]

[< PREV]   [NEXT >]

ADOBE® CAPTIVATE™

Labor Distribution Transaction - HR Front End

Employee Reco

OUTBOXES   TRANSACTIONS ▼   ADMIN TOOLS ▼   ? HELP   LOGOUT

Doe, John

Full View:Transac
ORG:Default:Initia

FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
mpleted:Editable:BioDemoAccess:JobAccess=[U82205-00], Stop:

DATE: 1/1/2010

Limited ERV | Timeline View

You will now see the Labor Distribution component in the **Proposed Changes** accordion. If you have multiple components click the view link to view the change.

❏ PROPOSED CHA

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View	194650	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	Delete	

Add Change

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

❏ EMPLOYEE GENERAL INFORMATION

Route | Save | Cancel   Release Ownership | Send To | Send FYI | Print Friendly View

JOBS

Expand All

❏ **U82205-00:** OFFICE SUPPORT SPEC (LU)   **ECLS:** CA   **TS ORG:** 1-418001   **TYPE:** P   **FTE:** 1.000   **HRLY:** 22.169000   **BEGIN:** 12/21/2003   **BGT PRO:** R   **STATUS:** A

Route | Save | Cancel   Release Ownership | Send To | Send FYI | Print Friendly View

Click the **Next** button to continue.

< PREV   NEXT >

ADOBE®CAPTIVATE™

Chapter 6 Review

In this Chapter, you have learned:

- How to remove a Labor Distribution
- How to save

Click the **Next** button to continue.

< PREV   NEXT >

Chapter 7

Routing and Applying a Labor Distribution Transaction

In this Chapter, you will learn:

- How to route the transaction
- How to apply the transaction

Click the **Next** button to continue.

< PREV

NEXT >

Labor Distribution Transaction - HR Front End

Doe, John 651234567 1-418001-Bureau Admin ECLS: CA Total FTE: 1.000 Base Salary: $43,229.68 Total Salary: $43,229.68

Full View:Transaction (92465:505780) LD (194651):Owner=No (None):Not Completed:Readonly:BioDemoAccess:JobAccess=[U21633-00, U67339-00, U09929-00, U60002-00, U55027-00, U55027-01, U00661-00, U82205-00, U00661-01, U54241-00, U54241-01, U09021-00, U54241-04, U00916-00, U54241-02, U54241-03, U66297-00], Stop: ORG:Default:Apply C U-1-KN-418-418001 (92465:505780)

DATE: 1/1/2010 [View]   Limited ERV | Timeline View

PROPOSED CHANGES

	ID	Change Date	Personnel Date	Job	TS Org	Apply Status
View	194651	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-4180 Admin	

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.

| GENERAL INFO | BIO / DEMO | MEMOS | |

EMPLOYEE GENERAL INFORMATION

[Route] [Save] [Cancel]

Once the transaction is completed, it is ready to be routed. Click **Route**.

U8   : CA   TS ORG: 1-418001   TYPE: P   FTE: 1.000   HRLY: 22.169000   BEGIN: 12/21/2003   BGT PRO: R   STATUS: A

[Expand All]

< PREV   NEXT >

Employee Record View

HOME   EMPLOYEE SEARCH   IN/OUTBOXES   ADMIN TOOLS ▼   HELP   LOGOUT

• Success routing to ORG:Default:Apply C U-1-KN-418-418001 (92465:505780).

Once the transaction has been routed you will get a success routing message.

Doe, John   6512345   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
Full View:Transaction (92465:   completed:Readonly:BioDemoAccess:JobAccess=[U21633-00, U67339-00, U09929-00,
U60002-00, U55027-00, U55027   -00, U54241-01, U09021-00, U54241-04, U00916-00, U54241-02, U54241-03, U66297-00],
Stop: ORG:Default:Apply C U-   KN-418-418001 (92465:505780)

DATE: 1/1/2010   View   Limited ERV   Timeline View

⬥ **PROPOSED CHANGES**

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
View	194651	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	

If the Labor Distribution is able to be directly applied, you will see a **Take Ownership** button. Click **Take Ownership**.

| GENERAL INFO | BIO / DEMO | MEMOS | |

⬥EMPLOYEE GENERAL INFORMATION

Take Ownership   Print Friendly View

JOBS

Expand All

⬥ U82205-00: OFFICE SUPPORT SPEC (LU)   ECLS: CA   TS ORG: 1-418001   TYPE: P   FTE: 1.000   HRLY: 22.169000   BEGIN: 12/21/2003   BGT PRO: R   STATUS: A

Take Ownership   Print Friendly View

< PREV   NEXT >

ADOBE®CAPTIVATE™

Labor Distribution Transaction - HR Front End

Employee Record View   🏠 HOME   👥 EMPLOYEE SEARCH   📧 IN/OUTBOXES   📄 TRANSACTIONS ▼   👤 ADMIN TOOLS ▼   ❓ HELP   ⏻ LOGOUT

Doe, John   651234567   1-418001-Bureau Admin   ECLS: CA   Total FTE: 1.000   Base Salary: $43,229.68   Total Salary: $43,229.68
Full View:Transaction (92471:505795) LD (194661):Owner=Yes (sandrsn):Not Completed:Editable:BioDemoAccess:JobAccess=[U21633-00, U67339-00, U09929-00, U60002-00, U55027-00, U55027-01, U00661-00, U82205-00, U00661-01, U54241-00, U54241-01, U09021-00, U54241-04, U00916-00, U54241-02, U54241-03, U66297-00], Stop: ORG:Default:Apply C U-1-KN-418-418001 (92471:505795)

DATE: 1/1/2010   [View]   [Limited ERV] [Timeline View]

🔽 PROPOSED CHANGES

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View	194661	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	[Delete]	

[Add Change]

> **Click Apply.**

MO   MEMOS   ATTACHMENTS   AUDIT TRAIL

ON

[Apply] [Return] [Save] [Cancel]   [Release Ownership] [Send To] [Send FYI] [Print Friendly View]

JOBS

[Expand All]

🔽 U82205-00: OFFICE SUPPORT SPEC (LU)   ECLS: CA   TS ORG: 1-418001   TYPE: P   FTE: 1.000   HRLY: 22.169000   BEGIN: 12/21/2003   BGT PRO: R   STATUS: A

[Apply] [Return] [Save] [Cancel]   [Release Ownership] [Send To] [Send FYI] [Print Friendly View]

[< PREV]   [NEXT >]

Historical Employee Record View   HOME   EMPLOYEE SEARCH   IN/OUTBOXES   ADMIN TOOLS ▼   HELP   LOGOUT

• Success applying.

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.

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.

	ID	Date	Date	Job	TS			Apply Status
View	194651	01/01/2010		U82205-00 OFFICE SUPPORT SPEC (LU)	1-418001 Bureau Admin		LD	☀ Pass

GENERAL INFO	BIO / DEMO	MEMOS	ATTACHMENTS	AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

Print Friendly View

JOBS

Expand All

U82205-00: OFFICE SUPPORT SPEC (LU)   ECLS: CA   TS ORG: 1-418001   TYPE: P   FTE: 1.000   HRLY: 22.169000   BEGIN: 12/21/2003   BGT PRO: R   STATUS: A

Click the **Next** button to continue.

< PREV   NEXT >

ADOBE®CAPTIVATE™

Chapter 7 Review

In this Chapter, you have learned:

- How to route the transaction
- How to apply the transaction

Click the **Next** button
to continue.

< PREV

NEXT >

ADOBE®CAPTIVATE™

Labor Distribution Transaction - HR Front End

You have reached the conclusion of the Labor Distribution Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the **COMPLETE COURSE** button below.

COMPLETE COURSE

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV

BEGIN COURSE

ADOBE®CAPTIVATE™