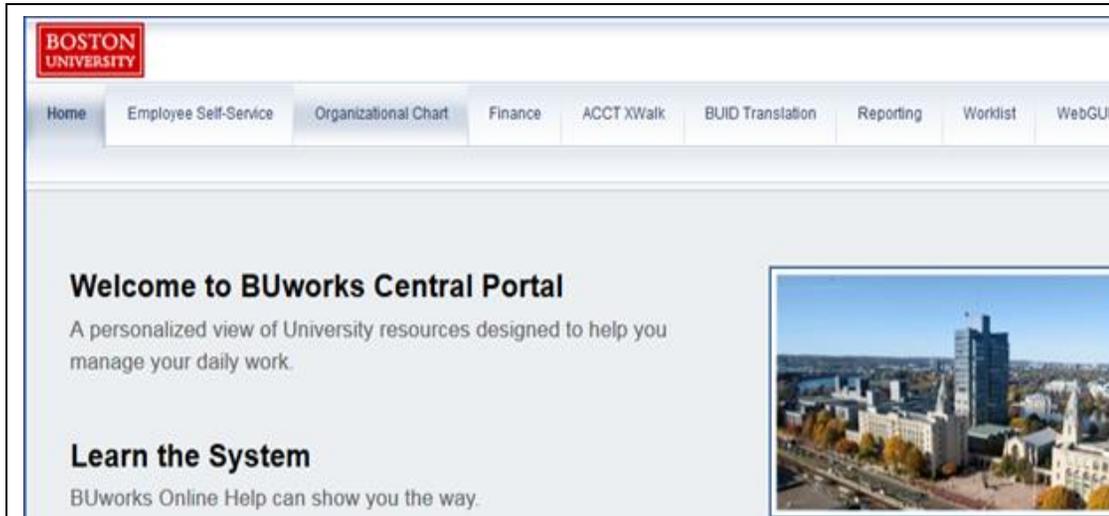


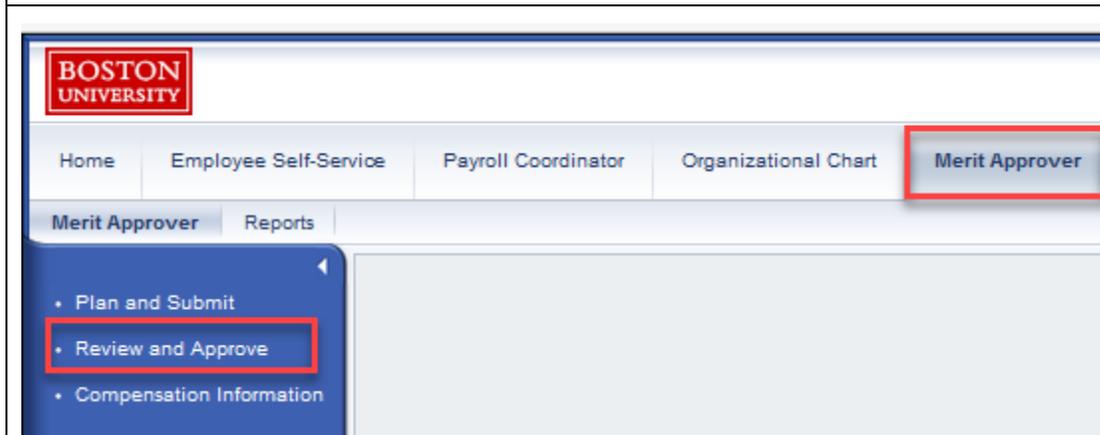


Manager Approval for Faculty Recommendations

A merit approver needs to review and approve a submission for merit increase/adjustment/promotion/retention upon submission of a faculty recommendation by a manager in his/her org unit during the annual compensation review process.

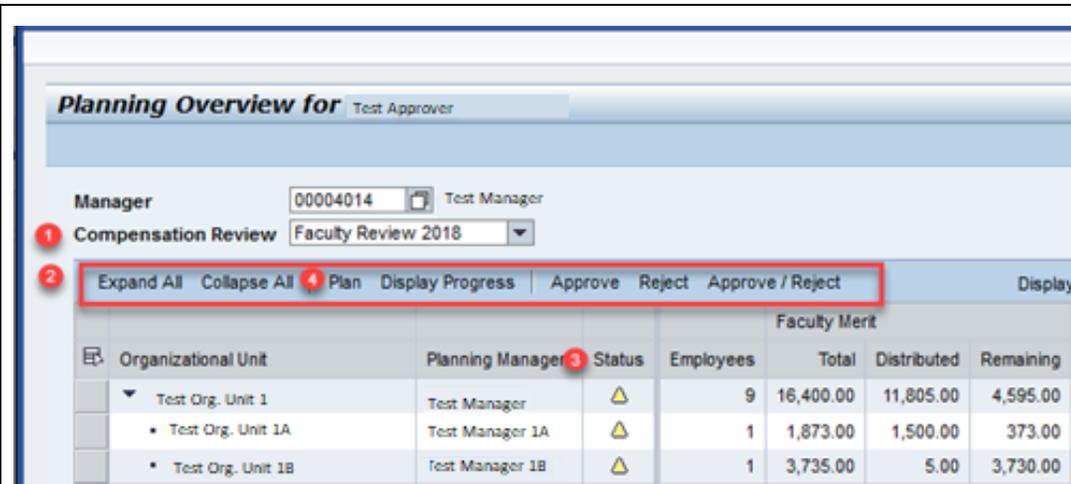


Log on to **BUworks Central**: <https://ppo.buw.bu.edu>



1. Click on the **Merit Approver** tab
2. Click on **Review and Approve**

Manager Approval for Faculty Recommendations



Planning Overview for Test Approver

Manager: 00004014 Test Manager

Compensation Review: Faculty Review 2018

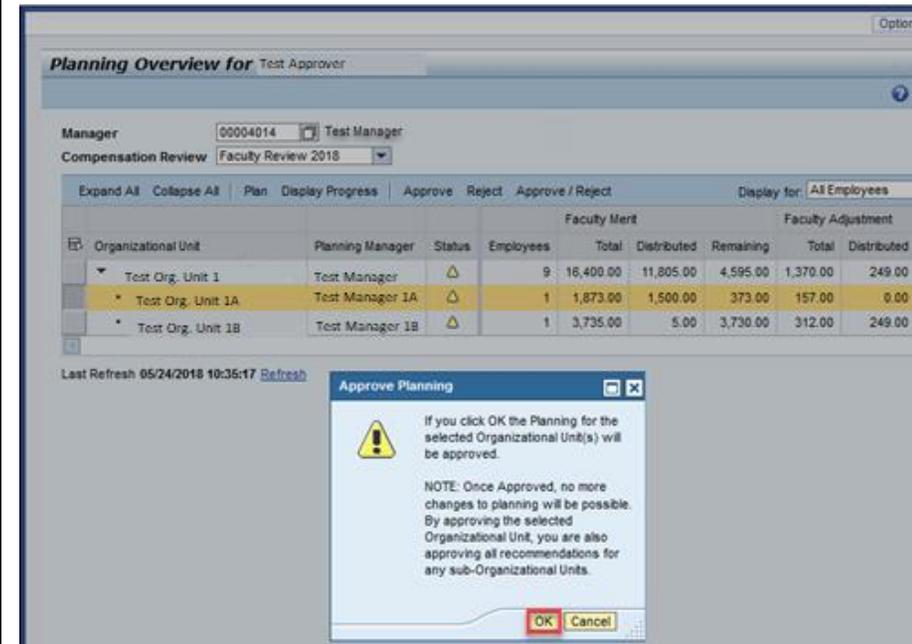
Buttons: Expand All, Collapse All, Plan, Display Progress, Approve, Reject, Approve / Reject, Display

Organizational Unit	Planning Manager	Status	Employees	Total	Distributed	Remaining
Test Org. Unit 1	Test Manager	⚠	9	16,400.00	11,805.00	4,595.00
Test Org. Unit 1A	Test Manager 1A	⚠	1	1,873.00	1,500.00	373.00
Test Org. Unit 1B	Test Manager 1B	⚠	1	3,735.00	5.00	3,730.00

1. Select the **Compensation Review** drop down and click on **Faculty Review**
2. To select an Org Unit, click on the **org unit name** (note that you can expand org units by clicking the arrow next to the unit or highlighting unit and pressing “Expand All”). For approver processing, you have 3 options to choose from:
 - Approve
 - Reject
 - Plan (see step 4)

If you are ready to approve or reject a planned and submitted (yellow triangle) org unit, highlight the org and click **approve** (or reject) and confirm your action on the pop-up warning. Once you confirm your action the org’s status will change from yellow to green (approved) or yellow to red (sets unit back to “in planning”)

3. The status column shows if an org unit is in **planning mode** (red circle ●), **needs approval** (yellow triangle ⚠) or **approved** (green square ■)
4. If you wish to see details of a planned unit or to re-plan a unit, highlight the unit, click **Plan** and follow the directions below in the [PLANNING COMPENSATION](#) section. Please note it might not be possible to re-plan a unit if it has been approved by a higher level approver



Planning Overview for Test Approver

Manager: 00004014 Test Manager

Compensation Review: Faculty Review 2018

Buttons: Expand All, Collapse All, Plan, Display Progress, Approve, Reject, Approve / Reject, Display for: All Employees

Organizational Unit	Planning Manager	Status	Employees	Total	Distributed	Remaining	Total	Distributed
Test Org. Unit 1	Test Manager	⚠	9	16,400.00	11,805.00	4,595.00	1,370.00	249.00
Test Org. Unit 1A	Test Manager 1A	■	1	1,873.00	1,500.00	373.00	157.00	0.00
Test Org. Unit 1B	Test Manager 1B	⚠	1	3,735.00	5.00	3,730.00	312.00	249.00

Last Refresh 05/24/2018 10:35:17 Refresh

Approve Planning

⚠ If you click OK the Planning for the selected Organizational Unit(s) will be approved.

NOTE: Once Approved, no more changes to planning will be possible. By approving the selected Organizational Unit, you are also approving all recommendations for any sub-Organizational Units.

OK Cancel

Manager Approval for Faculty Recommendations

Planning Overview for Test Approver

Manager: 00004014 Test Manager

Compensation Review: Faculty Review 2018

Expand All Collapse All | Plan Display Progress | Approve Reject Approve / Reject Display

Organizational Unit	Planning Manager	Status	Employees	Faculty Merit		
				Total	Distributed	Remaining
Test Org. Unit	Test Manager	⚠	9	16,400.00	11,805.00	4,595.00
Test Org. Unit 1A	Test Manager 1A	⚠	1	1,873.00	1,500.00	373.00
Test Org. Unit 1B	Test Manager 1B	⚠	1	3,735.00	5.00	3,730.00

Also note, from the approval screen you can see the total guideline and spend for your org units. The total, distributed and remaining guideline in the Merit/Adjustment is displayed all for subunits

Congratulations! You have successfully **approved** a faculty recommendation submitted by a manager.

Planning Overview for Test Approver

Manager: 00081028 Test Manager

Compensation Review: Faculty Review 2018

Expand All Collapse All | **Plan** Display Progress | Approve Reject Approve / Reject

Organizational Unit	Planning Manager	Status
Test Org. Unit	Test Manager	⚠
Test Org. Unit 1A	Test Manager 1A	✅

PLANNING COMPENSATION

- Clicking on **Plan** will take you to the **Plan Compensation Data** screen. You can make recommendations for an increase in either of two ways: **Worksheet** (shown below) mode or **Individual Planning** mode
- To begin re-planning/planning for employees in the Worksheet mode, click on **employee name**. Any employees with non-grayed out boxes could be re-planned. For a planning in worksheet mode follow the directions below

Manager Approval for Faculty Recommendations

The screenshot shows the 'Salary Planning' interface for a 'Test Manager'. It features a 'Guideline' section (1) with a 'View: Default Compensation' dropdown and 'Export', 'Individual Planning' (3), and 'Salary History' (4) buttons (5). Below is a table with columns: Check (2), Name, Rank, Curr Salary / Rate, Merit %, and Merit Amt (0.00). A second table below has columns: Adj % (6), Adj Amt (7), Promo % (8), Promo Amt (9), Ret % (10), Ret Amt (11), New Salary / Rate, BU ID, and Notes (12). The second table shows values of 0.00 for Adj Amt, Promo Amt, and Ret Amt.

Screen Overview	Description
1. Guideline	Guideline for Merit/Adjustment categories
2. Check	Warning messages related to employee's planning
3. Salary History	Employee's salary history available in SAP
4. Merit %	Merit in %
5. Merit Amt	Merit in \$ amt
6. Adj %	Adjustment in %
7. Adj Amt	Adjustment in \$ amt
8. Promo %	Promotion in %
9. Promo Amt	Promotion in \$ amt
10. Ret %	Retention in %
11. Ret Amt	Retention in \$ amt
12. Notes	These notes do not replace the Dean's comments. Can be used for recording additional information regarding the increase

Manager Approval for Faculty Recommendations

Salary Planning

Guideline 1

Faculty Merit

10,300.00 / 10,792.00 (USD)

Faculty Adjustment

0.00 / 901.00 (USD)

View: Default Compensation | Export | Individual Planning | Salary History 2

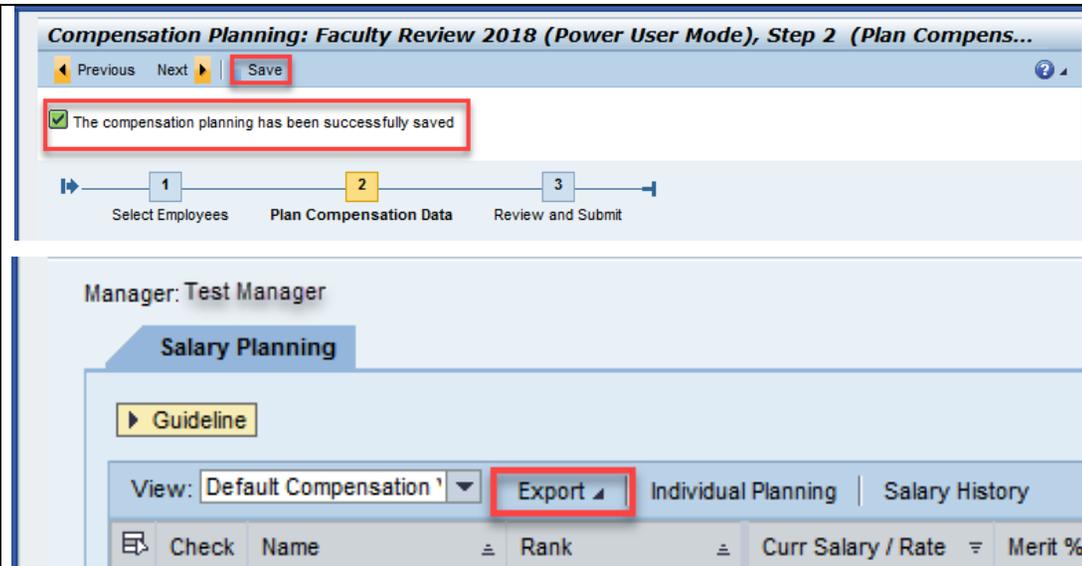
Check	Name	Rank	Curr Salary / Rate	Merit %	Merit Amt
					10,300.00
<input checked="" type="checkbox"/>	Test Faculty 1	Assistant Professor	66,203.00	3.02	2,000.00

Adj %	Adj Amt	Promo %	Promo Amt	Ret %	Ret Amt	New Salary / Rate	BU ID	Notes
0.00	0.00	0.00	0.00	0.00	0.00	68,203.00		
0.00	0.00	0.00	0.00	0.00	0.00	68,203.00		

1. To view Guideline, click on **Guideline**
2. To view Salary History available in SAP, click on **Salary History**
3. Enter either a **Merit %** OR a **Merit amount** and press Enter key.
4. Enter either **Adjustment %** OR **Adjustment amount** and press Enter Key
5. Enter either **Promo %** OR **Promotion amount** and press Enter Key
6. Enter either **Retention %** OR **Retention Amount** and press Enter Key
7. These notes do not replace the Dean's comments and can be used for recording any additional information regarding an increase

To plan for the next employee, click on the **next employee's name**

Manager Approval for Faculty Recommendations



Compensation Planning: Faculty Review 2018 (Power User Mode), Step 2 (Plan Compens...)

Navigation: Previous | Next | **Save**

Message: **The compensation planning has been successfully saved**

Progress: 1 Select Employees | 2 **Plan Compensation Data** | 3 Review and Submit

Manager: Test Manager

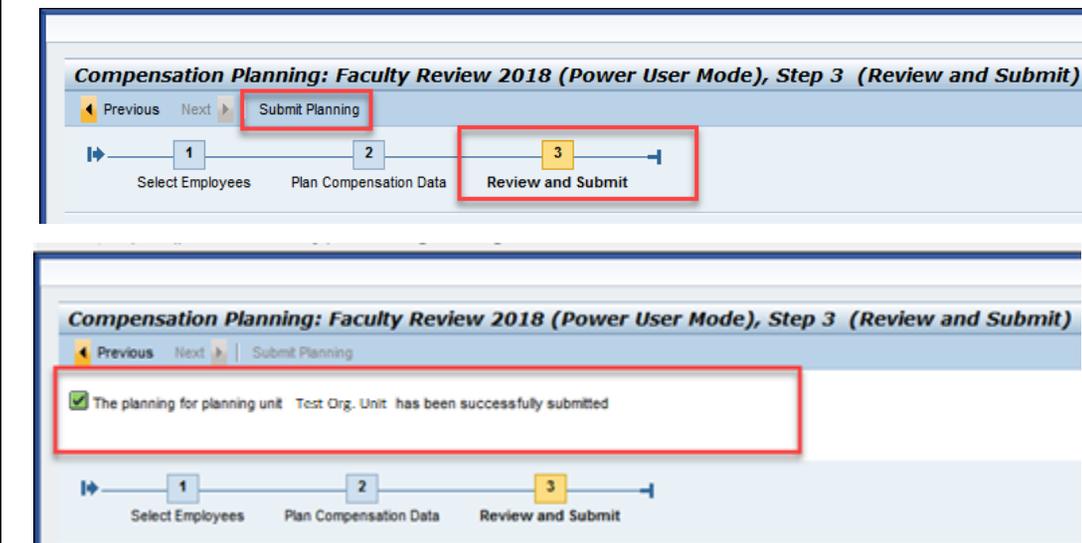
Salary Planning

Guideline

View: Default Compensation | **Export** | Individual Planning | Salary History

Check	Name	Rank	Curr Salary / Rate	Merit %
-------	------	------	--------------------	---------

1. To **re-save** any changes you have made, click on **Save**. A confirmation message **“The compensation planning has been successfully saved”** will be displayed. Please note, if you are making **updates** to an org unit that was in **submitted status** you just need to click **Save**
2. To export the worksheet data to Excel, click **Export**. All the data will be exported to a file on your local computer



Compensation Planning: Faculty Review 2018 (Power User Mode), Step 3 (Review and Submit)

Navigation: Previous | Next | **Submit Planning**

Progress: 1 Select Employees | 2 Plan Compensation Data | 3 **Review and Submit**

Compensation Planning: Faculty Review 2018 (Power User Mode), Step 3 (Review and Submit)

Navigation: Previous | Next | Submit Planning

Message: **The planning for planning unit Test Org. Unit has been successfully submitted**

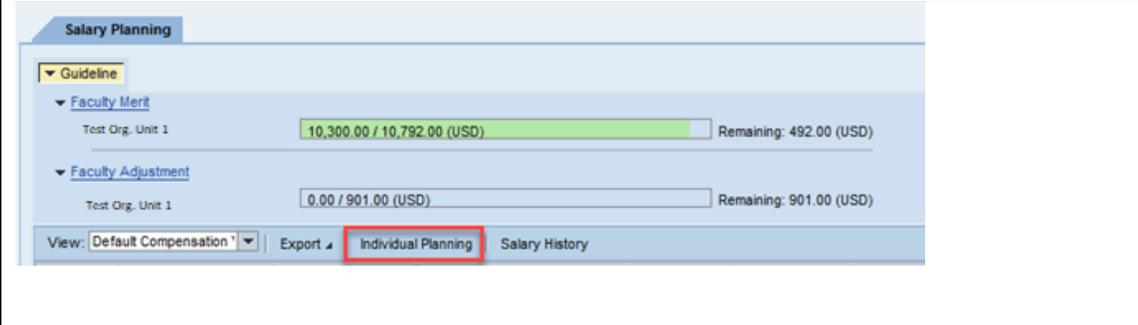
Progress: 1 Select Employees | 2 Plan Compensation Data | 3 **Review and Submit**

1. If you were making changes to a unit that was in **Planning Status**, click on **Review and Submit**
2. If you have no more changes to make, click on **Submit Planning**

A confirmation message **“The compensation planning has been successfully submitted”** is displayed. Close the window to exit the worksheet.

Manager Approval for Faculty Recommendations

Planning for Employees in INDIVIDUAL PLANNING Mode (as opposed to Worksheet Mode.)



Salary Planning

▼ **Guideline**

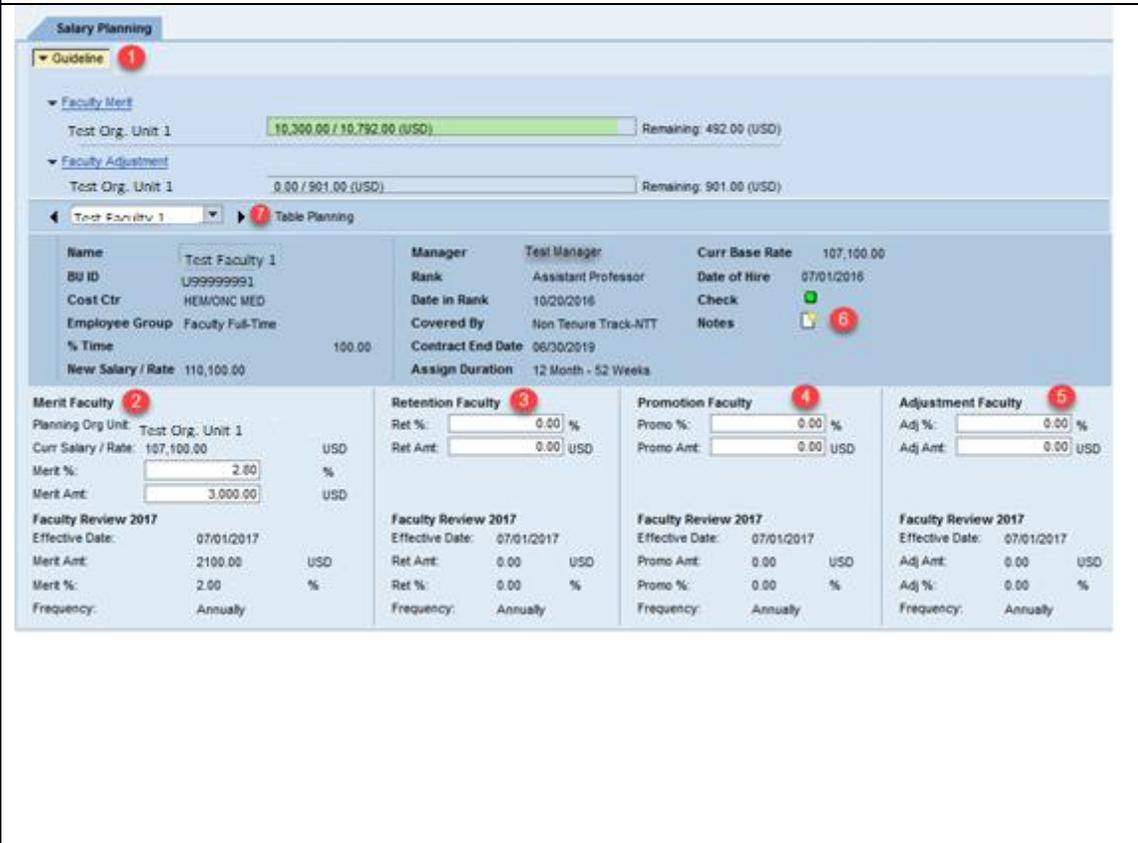
▼ **Faculty Merit**
 Test Org. Unit 1: 10,300.00 / 10,792.00 (USD) Remaining: 492.00 (USD)

▼ **Faculty Adjustment**
 Test Org. Unit 1: 0.00 / 901.00 (USD) Remaining: 901.00 (USD)

View: Default Compensation | Export | **Individual Planning** | Salary History

INDIVIDUAL PLANNING

Highlight an employee (or employees) and click on **Individual Planning** will bring up an individual's details.



Salary Planning

▼ **Guideline** 1

▼ **Faculty Merit**
 Test Org. Unit 1: 10,300.00 / 10,792.00 (USD) Remaining: 492.00 (USD)

▼ **Faculty Adjustment**
 Test Org. Unit 1: 0.00 / 901.00 (USD) Remaining: 901.00 (USD)

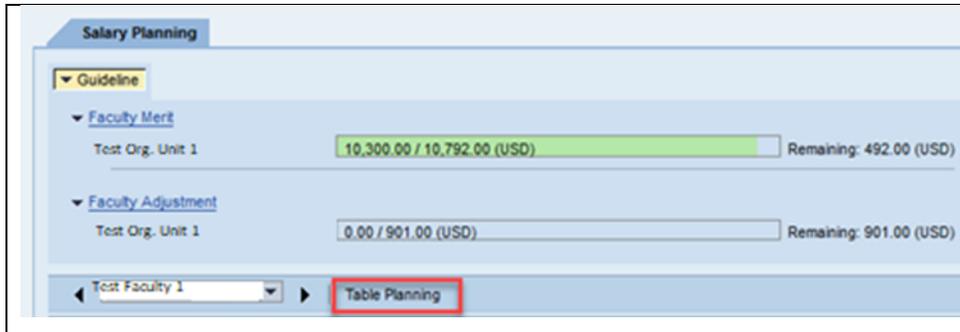
◀ Test Faculty 1 ▶ 7 Table Planning

Name : Test Faculty 1	Manager : Test Manager	Curr Base Rate : 107,100.00
BU ID : U99999991	Rank : Assistant Professor	Date of Hire : 07/01/2016
Cost Ctr : HEM/ONC MED	Date in Rank : 10/20/2016	Check : <input checked="" type="checkbox"/>
Employee Group : Faculty Full-Time	Covered By : Non Tenure Track-NTT	Notes : <input type="text"/> 6
% Time : 100.00	Contract End Date : 06/30/2019	
New Salary / Rate : 110,100.00	Assign Duration : 12 Month - 52 Weeks	

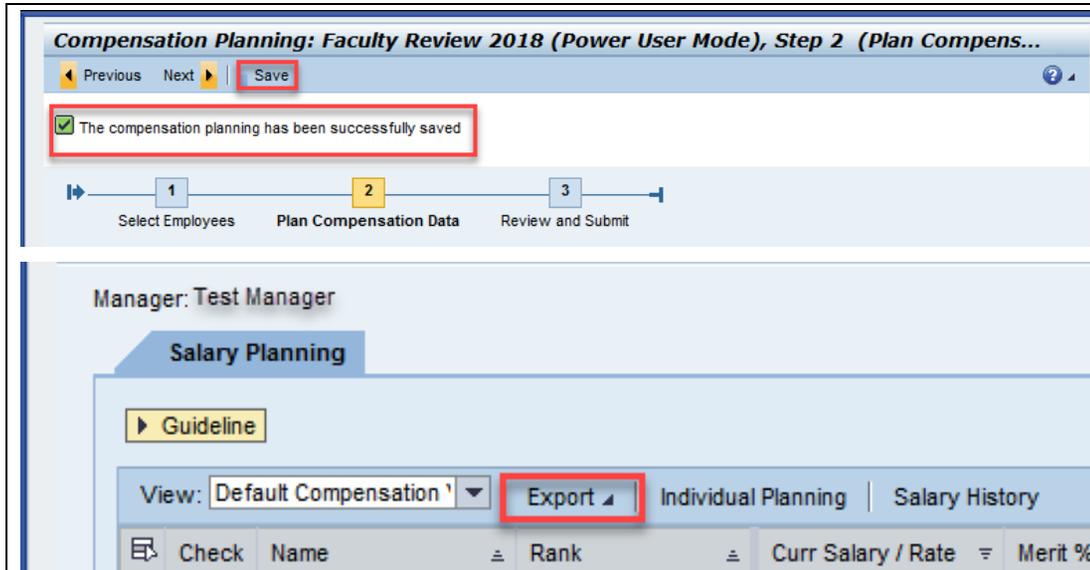
Merit Faculty 2	Retention Faculty 3	Promotion Faculty 4	Adjustment Faculty 5
Planning Org Unit: Test Org. Unit 1	Ret %: <input type="text"/> 0.00 %	Promo %: <input type="text"/> 0.00 %	Adj %: <input type="text"/> 0.00 %
Curr Salary / Rate: 107,100.00 USD	Ret Amt: <input type="text"/> 0.00 USD	Promo Amt: <input type="text"/> 0.00 USD	Adj Amt: <input type="text"/> 0.00 USD
Merit %: <input type="text"/> 2.00 %			
Merit Amt: <input type="text"/> 3,000.00 USD			
Faculty Review 2017	Faculty Review 2017	Faculty Review 2017	Faculty Review 2017
Effective Date: 07/01/2017	Effective Date: 07/01/2017	Effective Date: 07/01/2017	Effective Date: 07/01/2017
Merit Amt: 2100.00 USD	Ret Amt: 0.00 USD	Promo Amt: 0.00 USD	Adj Amt: 0.00 USD
Merit %: 2.00 %	Ret %: 0.00 %	Promo %: 0.00 %	Adj %: 0.00 %
Frequency: Annually	Frequency: Annually	Frequency: Annually	Frequency: Annually

1. To view the guideline in the Merit/Adjustment categories click on **Guideline**
2. Enter either **Merit % OR Merit Amount** and press Enter key
3. Enter either **Retention % OR Retention Amount** and press Enter key
4. Enter either **Promo % OR Promotion Amount** and press Enter key
5. Enter either **Adj % OR Adjustment Amount** and press Enter key
6. Click on **Notes** to enter a comment. These notes do not replace the Dean's comments.
7. Click on **arrows next to employee name** to move between employee records

Manager Approval for Faculty Recommendations

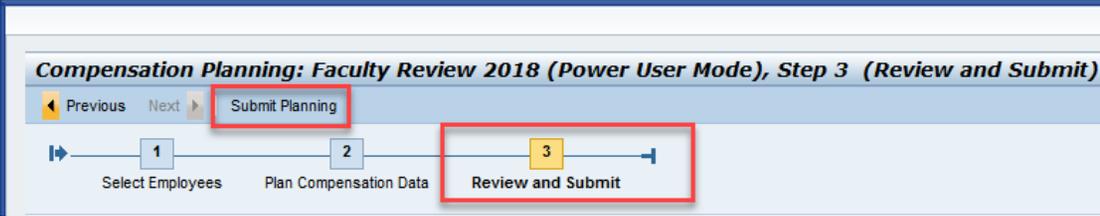
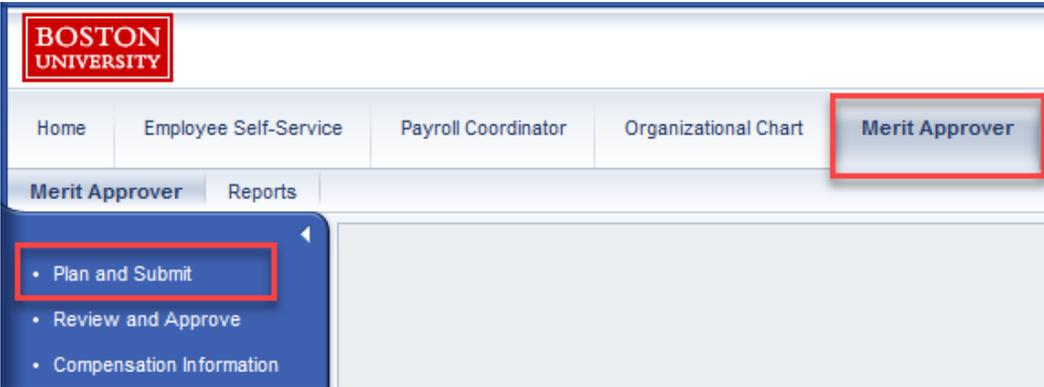


1. At any time to return to table format, click on **Table Planning**



3. To **re-save** any changes you have made, click on **Save**. A confirmation message “**The compensation planning has been successfully saved**” will be displayed. Please note, if you are making **updates** to an org unit that was in **submitted status** you just need to click **Save**
4. To export the worksheet data to Excel, click **Export**. All the data will be exported to a file on your local computer

Manager Approval for Faculty Recommendations

	<ol style="list-style-type: none">1. If you were making changes to a unit that was in Planning Status, click on Review and Submit2. If you have no more changes to make, click on Submit Planning <p>A confirmation message “The compensation planning has been successfully submitted” is displayed. Close the window to exit the worksheet</p>
	<p>A Merit Approver can also plan and submit recommendations for his/her eligible reports. Please refer to Faculty Merit Recommendation guide for instructions</p>