

**Online Title Code Range Adjustment System
TCR USER GUIDE**

May 28, 2008

INTRODUCTION	3
BACKGROUND	3
OVERVIEW	3
PRE-DEFINED POPULATIONS	4
RATE EFFECTIVE DATE	4
ERROR MESSAGES	4
NAVIGATION	4
GETTING ORGANIZED	4
ORGANIZING AND PRIORITIZING RULES	5
SUMMARY OF STEPS NEEDED TO CREATE PAYSCALE FILES	6
SCREENS – ACCESSING THE SYSTEM.....	7
TCR LOGIN SCREEN.....	7
TCR HOME PAGE.....	8
TCR POPULATION EXTRACT SCREEN – EXTRACT TCS DATA FROM MAINFRAME	9
TCR POPULATION BROWSE SCREEN – LOAD EXTRACTED DATA TO YOUR PC	12
TCR RULE SET BROWSE SCREEN.....	15
TCR RULE SET DETAIL SCREEN – CREATE RULE SET	16
TCR NEW RULE SCREEN – CREATE RANGE ADJUSTMENT PARAMETERS (RULES)	17
TCR RULE APPLICATION RESULTS SCREEN – RESULTS OF CALCULATIONS.....	28
TCR RULE APPLICATION RESULTS RATE DETAIL SCREEN	29
TCR RULE APPLICATION RESULTS RATE REPORT OPTIONS SCREEN	30
TCR INCLUDE/EXCLUDE REPORT OPTIONS SCREEN	31
FINALIZING A RANGE ADJUSTMENT	32
REPORTS	33
RULE SET REPORT.....	33
RULE APPLICATION RESULTS RATE REPORT.....	34
INCLUDE/EXCLUDE REPORT	35
BATCH PROCESSING OF RANGE ADJUSTMENT	37

Introduction

Background

The Title Code Range Adjustment System was developed in response to a request by the Office of Human Resources and Benefits and was implemented in October, 2003. The system is written in **net.data**. This system provided an efficient, timely, accurate and web-based facility for processing, reviewing, reporting and transmitting of staff range adjustments to the campuses.

Overview

The University of California periodically performs changes to selected stepped pay rates – these changes are referred to as "range adjustments". These pay rate changes apply to those titles designated as eligible for a particular range adjustment as determined by UC compensation policies or collective bargaining agreements. The range adjustment processing includes a process performed at Office of the President that updates the selected pay rates in the Title Code System (TCS). This process also produces campus Payroll/Personnel System (PPS) "payscale" files, which are used by payroll program PPP900 to update employee's pay rates where the title and pay rate for an employee match those being adjusted.

The core processing for the Title Code System range adjustment is currently performed by a PC-based system called the Title Code Range system, or TCR. An overview of the processing is as follows:

- Current Pay Rate data for stepped rates is extracted from the mainframe Title Code System database and loaded into the TCR range system. To ensure database integrity, the Title Code System database is locked, to prevent online updates to non-academic titles occurring while a range adjustment is in progress.
- Using a flexible PC-based system, users prepare "rules" that determine which pay rates will get each adjustment. For example, rules might be established so that all rates for titles belonging to Title Unit Code SX at the San Diego campus get a 3.2% increase, with the exception of titles 4444 and 4445, which get a 3.5% increase. These rules are then applied to the extracted pay rates, and the resulting old and new rates are returned to the Title Code System database for processing. Rates may be increased or decreased, and may be changed retroactively as well as well into the future.
- Once the users review and approve the old and new rates as well as included and excluded titles within TCR, the Title Code System database is updated with the new pay rates, effective as of the date of the range adjustment. The Title Code System database is then "unlocked" so that online updates are allowed.
- Transactions are also prepared for the campus Payroll/Personnel Systems (PPS) for updating employees' payrates, and the file with these transactions is referred to as the "payscale" file.
- Campus TCT updates resulting from payscale file creation will appear in the very next campus TCT transactions.
- Titles can be excluded *only* by not including them.
- Once created, payscale files cannot be corrected.

The above process is also available for performing range adjustments for Shift Differential rates. TCR may also be used to increase salary ranges (mind/mid/max rates) for merit-based (open range) titles across-the-board, but payscale files in this case are produced but should not be made available to campuses.

(Academic pay rates may also be range adjusted, but the process is quite different and the PC-based system is not used for academic range adjustments. Academic pay rates are range adjusted via CICS screens and are currently processed by Jo Agustin in Academic Advancement).

Currently the central Title Code System provides the capability for carrying differing rates for a title by campus and by Pay Representation Code (Covered or Uncovered). Rates may also differ by Sub Location, so that, for example, a Medical Center at a campus can assign different rates for a title than are used by the general campus, or so UCOP rates can differ from UCLA general campus rates. Changes to the Title Code System database have been implemented to allow for differing rates for up to four Sub Locations: AG for Division of Agriculture and Natural Resources, GN for General Campus, MD for Medical Center, and OP for Office of the President. If a title's pay rates do not vary across the Sub Locations, then rates may be assigned that apply across all Sub Locations (signified by **).

Pre-defined Populations

- Rates for Stepped titles (Rate Lookup flag = S, includes per diem titles)
- Rates for Shift Differential
- Open Range rates (Rate Lookup flag = M, excludes title pointing at Grade Table)

Rate Effective Date

All shift differential and staff PSS base rates are stored in TCS by effective date. A new effective date can be established either when initially adding rates via online update to the database or via the batch update resulting from a range adjustment. The effective date of a range adjustment is established when data is extracted from the mainframe at the beginning of the range processing. Rates in the database with an effective begin date after the specified effective date of the range adjustment will not be extracted for inclusion in a range adjustment. Additionally, rates with a definite ending date later than the effective date of the range adjustment will also not be extracted for inclusion in a range adjustment.

Error Messages

System error messages will appear and should be copied and pasted into Word and sent to the programmer for assistance. Press Alt/PrintScreen keys to copy screen; press Ctrl/V to paste into Word.

Navigation

Users will navigate between the screens of TCR using two methods:

- On the left-hand side of each screen will be a menu bar with links to the major functions of the application. The contents of this menu bar may vary for the different screens depending which menu selections are appropriate for the context. .
- Each screen will contain push-buttons associated with actions to be performed for the particular screen. In many cases clicking on the button will open a different screen.

Getting Organized

Prior to union contract ratification, send spreadsheets with current TCS rates to campuses for review and adjustment. When contracts are settled/ratified, organize spreadsheets with new and old rates by effective date (use monthly date) by campus and process oldest rates first. Within campus, organize both by title, and by link by title. When campuses want payscale files then TCR *must* be used to update rates. Rates can also be updated via TCS, but additional steps and conversions (i.e., stepped to open range) can be processed only through TCS.

Processing Order:

- Stepped titles first when payscale files are needed, oldest effective dates first (TCR)
- Shift Differential rates, oldest rates first. (TCR)
- Open range rates (TCR or TCS)
- Add additional steps or convert steps-to-open range, or open range-to-steps, or add rates when there were none before (TCS)

Organizing and Prioritizing Rules

A rule is an individual transaction or range adjustment parameter which will be applied and calculated against the bargaining population's rates. TCR automatically assigns a sequence and a priority number to each rule which you enter. Priority number is always 10 times the sequence number (e.g., priority is 10 for sequence number 1), and is always assigned in increments of 10 so that users may re-prioritize existing rules as necessary. When you initiate the processing of range adjustment calculations (APPLY RULES button) and they are applied to the population with which you are working, TCR processes them from the highest to lowest priority number. For example, a rule with priority 20 is processed before a rule with priority 10. While a title can be included in several rules, (e.g., within its TUC, Linkage and Location), it is calculated by only one of those rules. That is the rule which has the highest priority number.

Consequently, before you begin entering rules into TCR, be sure to first organize your rules so that the largest or most general categories of Selection Type (e.g., Linkage or TUC) are entered prior to the more detailed categories (e.g., title) which are subsets of the larger categories.

For example, following is a typical scenario in the Patient Care Technical (EX) Unit:

- Priority 10, Seq 1, Link 019, 3% at DV
- Priority 20, Seq 2, Title 9042, 4% at DV
- Priority 30, Seq 3, Link 014, 4% at SD
- Priority 40, Seq 4, Titles 9007-9008, 5% at SD

First entered and lowest priority is Link 019 which applies an across-the-board 3% increase at Davis. Next entered with a higher priority is title code 9042 with a 4% increase at Davis. Title Code 9042 is a subset of Link 019. While title 9042 already received a 3% increase in the first rule, the second rule will supersede the first rule and take priority over it due to its higher priority number, thus giving title 9042 a 4% increase. The next two rules relate to Link 014 at San Diego – the last rule is a subset of Link 014 and thus takes priority due to its higher priority number. However, if you add the following 5th rule:

- Priority 50, Seq 5, TUC = EX, 6% at SD and DV

This rule will negate the previous 4 rules and take priority over them since it contains the highest priority number and thus it applies an across-the-board 6% to the entire bargaining unit. If, however, you change the priority number on this 5th rule as follows:

- Priority 09, Seq 5, TUC = EX, 6% at SD and DV

It will take lowest priority even though it has the highest sequence number and you entered it last. This 5th rule will thus apply a 6% increase at Davis and San Diego to only any Links and titles not covered by the other 4 rules.

Once you have entered all your rules, you may want to go back and enter additional rules later on. The TCR System allows you to override the system-assigned priority number. You must first determine where the new rule falls in the scheme of your already-existing rules.

Summary of steps needed to create payscale files

- Extract preliminary data from mainframe
- Load preliminary data to the pc
- Create a ruleset
- Create rules (range adjustment parameters)
- Apply rules (process calculations)
- Check Rates reports to ensure accuracy of rates
- Check Include/Exclude reports and Rule Set report to ensure accuracy of population
- Extract final data from mainframe
- Load final data to the pc
- Finalize range adjustment
- Notify Production Control as to which jobs to run (TCSSAUP (stepped), TCSDUFUP (shift diff), TCSMMUP (open range), TCS32F (academic)). These jobs update TCS and create payscale files. See TCS OPS Doc for prompted variables.
- Production Control to email campuses notifying them of availability of payscale files

Screens – Accessing the System

TCR Login Screen

User enters ID and password

User types:

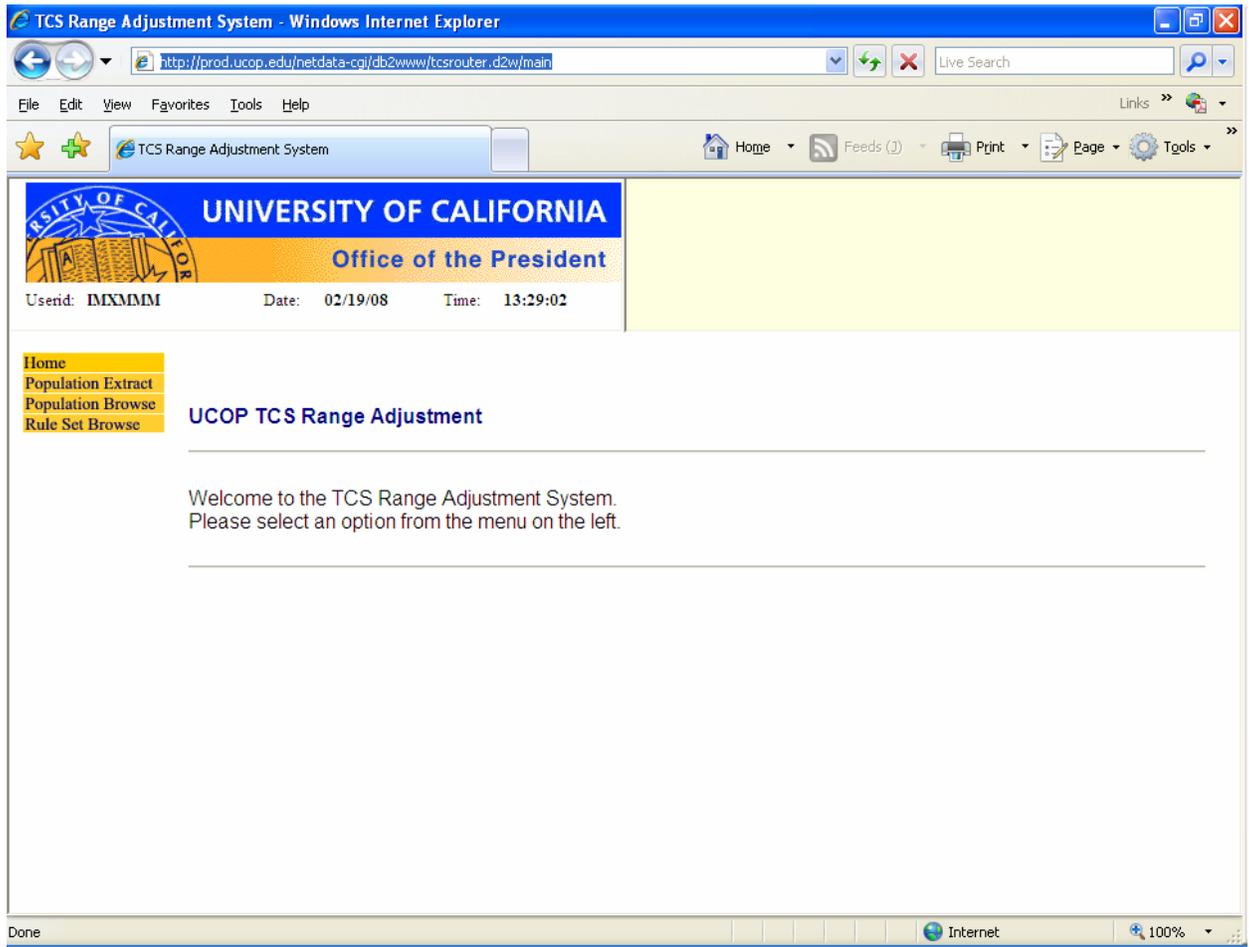
- Central super-user which has ability to extract data from mainframe (e.g. IMXMMM)
- Central user (e.g., IMXSTF, ELRMBN, ELRLLH)
- Campus super-user (to be implemented as part of TCS campus update)
- Campus user (to be implemented as part of TCS campus update)



TCR Home Page

Options

- Population Extract – extract current data from mainframe TCS (stepped, shift diff, open range)
- Population Browse – after extract, select population to be loaded to your pc
- Rule Set Browse – view and select existing rule sets



TCR Population Extract Screen – Extract TCS data from mainframe

TCR Range Adjustment System - Windows Internet Explorer

http://prod.ucop.edu/netdata-cgi/db2www/tcsrout... Live Search

File Edit View Favorites Tools Help

TCS Range Adjustment System

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 02/19/08 Time: 16:06:24

TCR Population Extract

Home
Population Extract
Population Browse
Rule Set Browse
Process Extract

Enter all information below and then press "Process Extract".

Effective Date: -- / -- / ----

Population Type: --Select One--

Use: --Select One--

Done Internet 100%

Data should be extracted from TCS at least twice for each rule set (i.e. each range adjustment), a minimum of one preliminary file, and no more than one final file. A preliminary file should be extracted when the user is ready to begin working on rules for a specific payscale file. A final file may be extracted days or weeks later, when it is time to create the campus payscale files. In the interim, rates in TCS for included/affected titles may change so rates must be re-extracted just prior to payscale creation in order to obtain the most current rates. Press Process Extract button on left side to begin the extract. Extracting can take anywhere from a few seconds to 10 minutes.

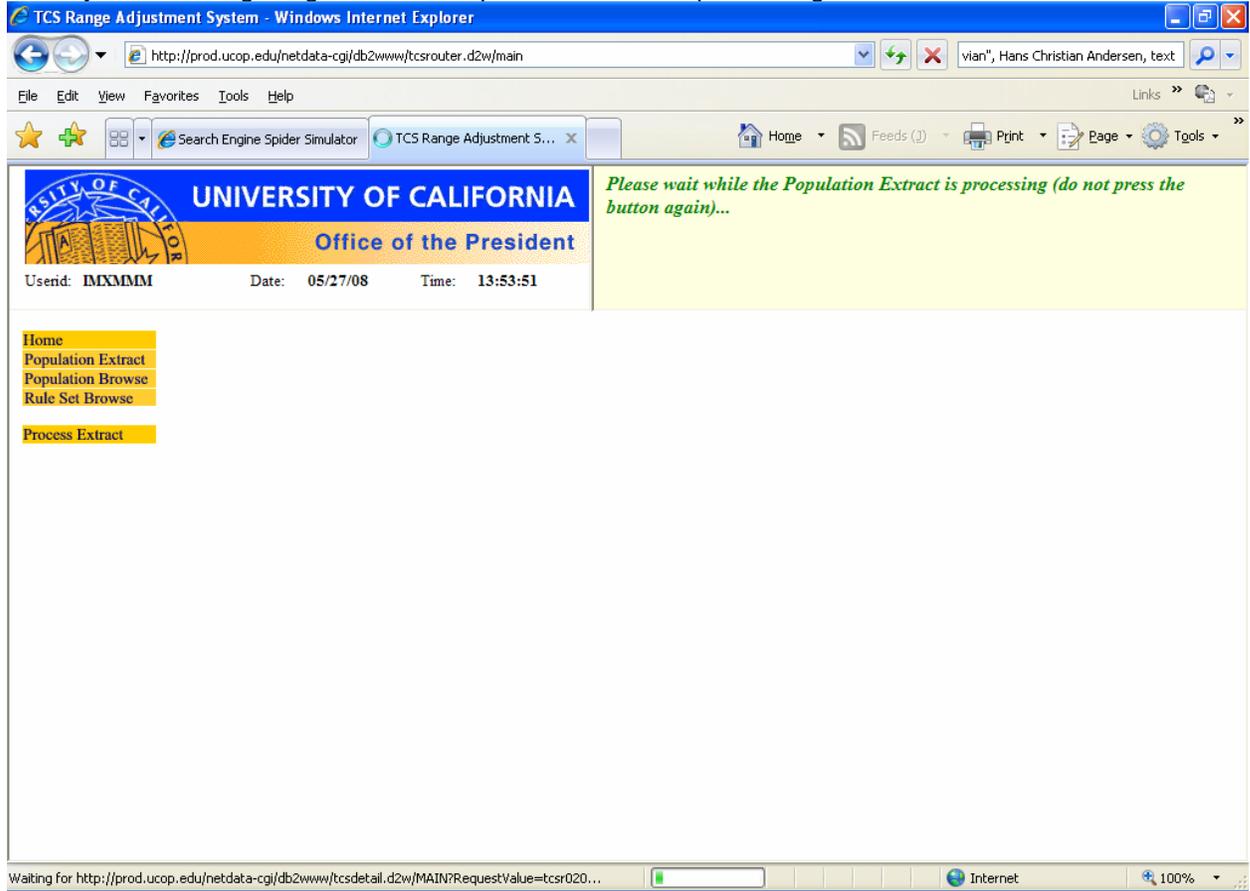
*Please note that while it is possible to create campus payscale files for both stepped and shift differential titles on the same day with the same effective date, users should never create two payscale files in the same day, for the same population (e.g., stepped titles), with the same effective date. This will result in the 2nd payscale replacing the 1st payscale files on the ftp site.

Data Entry Field Details – Accessed from main menu by super users only:

- **Effective Date** is the new effective date which will be used for new rates when the range adjustment is run. Rates in the TCS database with an effective begin date on or after the range adjustment effective date will not be extracted for inclusion in the range adjustment. Also, rates with a definite ending date (i.e., not 12/31/9999) will not be extracted for inclusion in the range adjustment. The effective date *must* be a monthly rather than biweekly date.
- **Population type** is a drop-down combo box with pre-defined title populations:

- All Merit-based Titles (includes open range titles not pointing to the grade table)
- All Step-based Titles (includes Per Diem titles)
- Shift Differential Rates
- **Use** is a drop-down combo box with the following selections:
 - Preliminary (to be used when ready to begin creating payscale file rules)
 - Final (to be used only when campus payscale files are ready to be created and will cause TCS database to be locked (i.e., no data entry allowed) until payscale files are created.

Note system message in green while Population Extract is processing:



Note system message in green when population extract is complete:

UNIVERSITY OF CALIFORNIA
Office of the President

Usend: IMXMMM Date: 05/27/08 Time: 13:53:51

Extract Complete.

Home	Population Type	Step
Population Extract	Effective Date	07/01/2008
Population Browse	Use	Prelim
Rule Set Browse		

Process Extract

TCR Population Browse Screen – Load extracted data to your PC

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 02/22/08 Time: 15:42:15

TCS Population Browse

Select	Population Type	Use	Effective Date	Latest Extract Date/Time	Loaded	Loaded Extract Date/Time	Range ID	Locked
<input type="radio"/>	Step	Prelim	10/01/2008	02/21/2008 03:02 PM	YES	02/21/2008 03:02 PM	STEPS1008	No

Locked populations have been finalized, but the range adjustment has not yet been run. They cannot be modified.

The Population Browse Screen is accessed from the main menu and displays a list of all populations available for loading to your PC. After extracting a population, select population to be loaded and press “Load” on left side. Loading will take anywhere from a few moments to 10 minutes.

Note system message in green while data is loading to the pc:

The screenshot shows a Windows Internet Explorer browser window. The title bar reads "TCS Range Adjustment System - Windows Internet Explorer". The address bar contains the URL "http://prod.ucop.edu/netdata-cgi/db2www/tcsrout.d2w/main". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The toolbar shows "Search Engine Spider Simulator" and "TCS Range Adjustment S...". The main content area features the University of California logo and "Office of the President" branding. A yellow banner displays the message "Processing Load. Please do not press the button again...". Below this, the user ID "Userid: IMXMMM", date "Date: 05/27/08", and time "Time: 13:53:51" are shown. A list of navigation links is provided: Home, Population Extract, Population Browse, Rule Set Browse, Load, Unload, and Delete. The status bar at the bottom indicates "Waiting for http://prod.ucop.edu/netdata-cgi/db2www/tcsdetail.d2w/MAIN?RequestValue=tcsr030..." and shows the "Internet" icon and "100%" zoom level.

Note system message in green when data has finished loading:

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/27/08 Time: 13:53:51

TCS Population Browse

Select	Population Type	Use	Effective Date	Latest Extract Date/Time	Loaded	Loaded Extract Date/Time	Range ID	Locked
<input type="radio"/>	Merit	Prelim	10/01/2008	02/27/2008 03:35 PM	YES	02/27/2008 03:35 PM	MERIT1008	No
<input checked="" type="radio"/>	Step	Prelim	07/01/2008	05/27/2008 01:54 PM	YES	05/27/2008 01:54 PM	STEPS0708	No

Locked populations have been finalized, but the range adjustment has not yet been run. They cannot be modified.

TCR Rule Set Browse Screen

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 02/22/08 Time: 15:42:15

TCS Rule Set Browse

View only your own rule sets
 View Other Users' Rule Sets

Select	User	Pop.	Description	ID	Rule Set Locked?	Pop Avail?	Range Eff Date	Extract Date	Use
<input type="radio"/>	IMXMMM	Merit	7/1/03 Open Range HX	1	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	PCT EX 1/1/04	2	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	SX test	3	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	10/1/05 SX Open Range	4	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	7/1/06 SX Open Range	5	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	10/1/06 SX Open Range	6	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	9/1/06 UCB EX open range	7	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	4/1/07 SX Low Wage	8	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	4/1/07 EX Low Wage	9	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	4/1/07 SX UCSF	10	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	10/1/2007 SX	11	No	YES	10/01/2007	09/25/2007 01:14 PM	Final
<input type="radio"/>	IMXMMM	Merit	4/2/07 UCSB SX Low	12	No	YES	10/01/2007	09/25/2007 01:14 PM	Final

A rule set is a group of range adjustment parameters or “rules”. The Rule Set Browse Screen is accessed from the main menu and displays a list of all of the rule sets belonging to the current user, or optionally, all rule sets belonging to all users. Select an existing rule set, or create a new one. If you wish to create a new rule set, select New Rule Set on the left side.

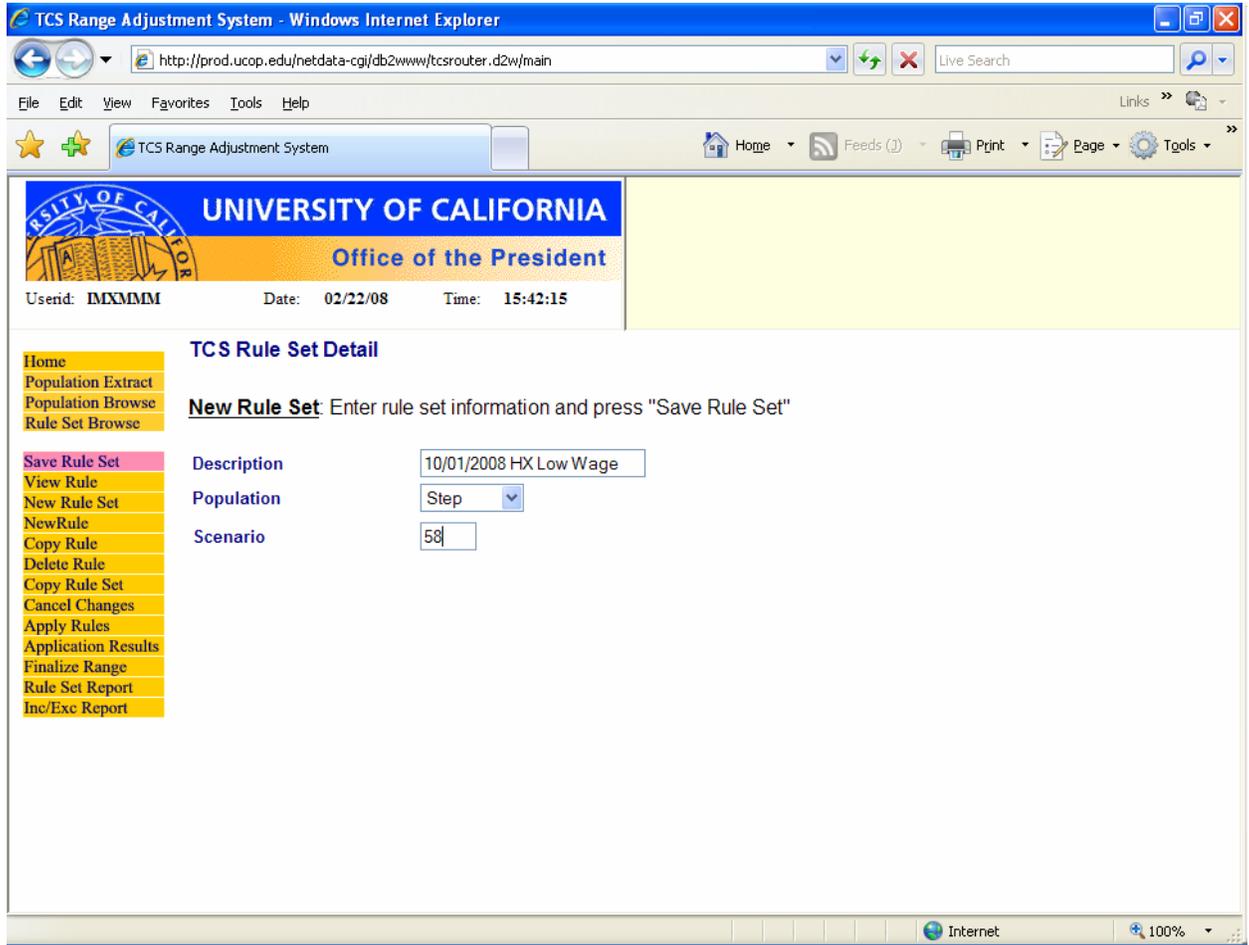
If you select an existing rule set, next select one of the following options on the left side:

Options

- View selected rule set detail screen
- Copy selected rule set (opens rule set detail screen)
- Delete selected rule set
- Apply selected rule set to the designated population. This initiates calculations of new rates. Error and warning messages may be displayed
- View Application Results for selected rule set
- Finalize adjusted rates for selected rule set for TCS range adjustment process (valid for final populations only). This will cause the extracted population and all user copies to be locked
- View/Print Rule Set Report for the selected rule set
- View/Print Include/Exclude Report for the selected rule set

If you wish to create a new rule set, select New Rule Set on the left side and the following TCR Rule Set Detail Screen will appear:

TCR Rule Set Detail Screen – create Rule Set



This screen will display detail information which uniquely identifies each rule set.

Data Entry Field Details:

- Rule Set Description any descriptive text. E.g., 10/01/07 NX.
- Population type is a drop-down combo box with the following selections:
 - Merit – use for open range titles (e.g., SX, EX) but do not make resulting payscale files available to campuses.
 - Step – use for stepped bargaining units (RX, HX, NX, CX, TX, EX-UCSF)
 - Shift – use when campuses want payscale files for shift differential increases.
- Scenario represents how many scenarios which exist for a specific population type. The example above reflects scenario 58 which means there are already 57 existing stepped scenarios. Use next available number.

TCR New Rule Screen – Create range adjustment parameters (rules)

Accessed from Rule Set Detail or Rule Detail screens by selecting "New Rule. Allows creation of individual range adjustment parameters called "rules".

The screen requires that the user select a rule type from the list of available types. Selection will control the available fields displayed on the rule detail screen.

Field Details:

- Seq No – assigned by system - a display only field showing the relative sequence number of the rule within the rule set.
- Rule type is a drop-down combo box with the following selections:
 - Single Title
 - Title Range
 - Title/Pay Interval – use for entering individual steps
 - CTO
 - Link
 - Link Range
 - Link/TUC
 - TUC/CTO
 - TUC
- Priority is the relative priority of the rule within the rule set. Rules with higher priority values will be processed first. Assigned by system in 10's – e.g., 10, 20, 30, 40, etc so that user can insert a priority if needed.

- Campus – select one or many or all campuses
- Sublocation – select one or several or all sublocations
- PAYREP – select COV or UNC or BOTH – use COV for bargaining agreements
- Shift Type – appears only when processing shift differential increases (when the population type is "Shift".) Select DAY, EVENING, NIGHT, SPLIT, WEEKEND DAY, WEEKEND EVENING, WEEKEND NIGHT.
- Values – enter values for Single Title, Title Range, CTO, Link Range, Link/TUC, TUC/CTO, TUC depending on Rule Type selected. See following screens for examples.
- Amount Type – Selected Percent, Dollar or New Amount. Use Percent for across-the-board percent increase. Use Dollar for across-the-board dollar or cent increase (e.g., \$.10 added to shift differential across-the-board). Use New Amount *only* with Title/Pay Interval Rule Type when all steps are being individually entered.
- Amount/Percent – Enter % or dollar amount by which rates will be increased. Indicate whether increase will be positive (+) or negative (-). Enter 5.00 for 5% and 50.00 for \$50.00

Be sure to SAVE each rule! (pink button on left side)

Rule Type – Single Title: Enter a single staff title in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem 7/1/03 Population: SB Use: Final Owner: IMXMMM

Seq No: **New Rule**

Rule Type: Single Title

Priority: 210

Campus(es): Select All BK DV IR LA ME RV SD SF SB SC
Clear All

Subloc(s): Select All ** GN AG MD OP
Clear All

Pay Rep: --Select--

Values: Title

Amount Type: --Select-- Amount/Percent: + . *Don't forget to press save before exiting*

Done Internet 100%

Rule Type – Title Range: Enter a range of staff titles in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem 7/1/03 Population: SB Use: Final Owner: IMXMMM

Seq No	New Rule										
Rule Type	Title Range										
Priority	210										
Campus(es)	Select All	BK	DV	IR	LA	ME	RV	SD	SF	SB	SC
	Clear All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Subloc(s)	Select All	**	GN	AG	MD	OP					
	Clear All	<input type="checkbox"/>									
Pay Rep	--Select--										
Values	Title 1	<input type="text"/>	Title 2	<input type="text"/>							
	Amount Type	Amount/Percent									
	--Select--	<input type="text"/>	+	<input type="text"/>	.	<input type="text"/>	<i>Don't forget to press save before exiting</i>				

Rule Type – Title/Pay Interval: Use for entering individual steps for a staff title

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

Rule Set: HX Per Diem 7/1/03 Population: SB Use: Final Owner: IMXMMM

Seq No: **New Rule**

Rule Type: Title/Pay Interval

Priority: 210

Campus(es): Select All BK DV IR LA ME RV SD SF SB SC
Clear All

Subloc(s): Select All ** GN AG MD OP
Clear All

Pay Rep: --Select-- Check to select subloc

Values: Title

Pay Interval	Amount Type	Amount/Percent
<input type="text"/>	--Select--	+ <input type="text"/> . <input type="text"/> <i>Don't forget to press save before exiting</i>
<input type="text"/>	--Select--	+ <input type="text"/> . <input type="text"/> <i>Don't forget to press save before exiting</i>

Done Internet 100%

Rule Type – CTO: Enter a CTO in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem 7/1/03 Population: SB Use: Final Owner: IMXMMM

Seq No: **New Rule**

Rule Type: CTO

Priority: 210 Enter Priority number

Campus(es): Select All BK DV IR LA ME RV SD SF SB SC
Clear All

Subloc(s): Select All ** GN AG MD OP
Clear All

Pay Rep: --Select--

Values: CTO

Amount Type: --Select-- Amount/Percent: + .

Don't forget to press save before exiting

Rule Type – Link: Enter a Link code in the Values field

TCS Rule Detail

Rule Set: HX Per Diem Population: SB Use: Final Owner: IMXMMM
7/1/03

Seq No: **New Rule**

Rule Type: Link

Priority: 210

Campus(es): Select All BK DV IR LA ME RV SD SF SB SC
Clear All

Subloc(s): Select All ** GN AG MD OP
Clear All

Pay Rep: --Select--

Values: Link

Amount Type: --Select-- Amount/Percent: + .

Don't forget to press save before exiting

Rule Type – Link Range: Enter a range of link codes in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem 7/1/03 Population: SB Use: Final Owner: IMXMMM

Seq No: New Rule

Rule Type: Link Range

Priority: 210

Campus(es): Select All BK DV IR LA ME RV SD SF SB SC
Clear All

Subloc(s): Select All ** GN AG MD OP
Clear All

Pay Rep: --Select--

Values: Link 1 Link 2

Amount Type: --Select-- Amount/Percent: + . *Don't forget to press save before exiting*

Rule Type – Link/TUC: Enter a Link and TUC in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem Population: SB Use: Final Owner: IMXMMM
7/1/03

Seq No	New Rule										
Rule Type	Link/TUC										
Priority	210										
Campus(es)	Select All	BK	DV	IR	LA	ME	RV	SD	SF	SB	SC
	Clear All	<input type="checkbox"/>									
Subloc(s)	Select All	**	GN	AG	MD	OP					
	Clear All	<input type="checkbox"/>									
Pay Rep	--Select--										
Values	Link	<input type="text"/>	TUC	<input type="text"/>							
	Amount Type	Amount/Percent									
	--Select--	+ <input type="text"/>	.	<input type="text"/>							

Don't forget to press save before exiting

Rule Type – TUC/CTO: Enter a TUC and CTO in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem 7/1/03 Population: SB Use: Final Owner: IMXMMM

Seq No	New Rule											
Rule Type	TUC/CTO											
Priority	210											
Campus(es)	Select All	BK	DV	IR	LA	ME	RV	SD	SF	SB	SC	
	Clear All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Subloc(s)	Select All	**	GN	AG	MD	OP						
	Clear All	<input type="checkbox"/>										
Pay Rep	--Select--											
Values	TUC	<input type="text"/>	CTO				<input type="text"/>					
	Amount Type	Amount/Percent										
	--Select--	<input type="text"/>	+	<input type="text"/>	.	<input type="text"/>	<i>Don't forget to press save before exiting</i>					

Rule Type – TUC: Enter a TUC in the Values field

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/22/08 Time: 12:55:07

TCS Rule Detail

Rule Set: HX Per Diem Population: SB Use: Final Owner: IMXMMM
7/1/03

Seq No: **New Rule**

Rule Type: TUC

Priority: 210

Campus(es):
 Select All BK DV IR LA ME RV SD SF SB SC
 Clear All

Subloc(s):
 Select All ** GN AG MD OP
 Clear All

Pay Rep: --Select--

Values: TUC

Amount Type: --Select-- Amount/Percent: + .

Don't forget to press save before exiting

TCR Rule Application Results Screen – results of calculations

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/23/08 Time: 10:49:10

TCS Rule Application Results

Description	test hx for user manual	Use	Prelim
Population	Step (Available)	Effective Date	07/01/2008
Scenario	65	Rule Set Owner	IMXMMM
<input type="checkbox"/> Show Rate Results <input type="checkbox"/> Show Messages <input checked="" type="checkbox"/> Rules Last Applied		Rules Last Applied	05/23/2008 02:11 PM

Warning and Error Messages
There are no messages to display

Rate Results
Rate results not displayed. Check 'Show Rate Results' to view details. There are 3228 rates to display. It may take a few minutes to display this number of results.

This screen appears when you are done creating rules and you press APPLY RULES on the left side. The screen reflects results of increase calculations. Enter a check mark in the Show Rate Results box to see results of calculations on the screen, or select Rate Report on left to print off calculation results. This screen will reflect the number of rates calculated as well as any error messages resulting from calculations.

TCR Rule Application Results Rate Detail Screen

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/23/08 Time: 10:49:10

TCS Rule Application Results

Description	test hx for user manual	Use	Prelim
Population	Step (Available)	Effective Date	07/01/2008
Scenario	65	Rule Set Owner	IMXMMM
<input type="checkbox"/> Show Rate Results <input checked="" type="checkbox"/> Show Messages		Rules Last Applied	05/23/2008 02:11 PM

Warning and Error Messages
There are no messages to display

Rate Results

Title	Camp	Sub	Rep	Link	In/Shift	Rule#	Incr/New	Old Rate	New Rate
5421 DIETITIAN, PD	DV	**	COV	026	1	1	5.00 %	37.4400	39.3100
5421 DIETITIAN, PD	IR	**	COV	026	1	1	5.00 %	30.7500	32.2900
5421 DIETITIAN, PD	LA	**	COV	026	1	1	5.00 %	31.0000	32.5500
5421 DIETITIAN, PD	LA	**	COV	026	2	1	5.00 %	36.0000	37.8000
5421 DIETITIAN, PD	SD	**	COV	026	1	1	5.00 %	26.6900	28.0200
5421 DIETITIAN, PD	SF	**	COV	026	1	1	5.00 %	32.3900	34.0100
5421 DIETITIAN, PD	SF	**	COV	026	2	1	5.00 %	35.6700	37.4500
5428 DIETITIAN I	BK	**	COV	026	1	1	5.00 %	3642.0000	3824.0000
5428 DIETITIAN I	BK	**	COV	026	2	1	5.00 %	3715.0000	3901.0000

Accessed from the Rule Application Results Screen, this screen shows the detail of rule application results for a selected rate, but is not printable. To print calculation results, select Rate Report on left.

TCR Rule Application Results Rate Report Options Screen

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/23/08 Time: 10:49:10

TCS Rate Report Options

Description	test hx for user manual	Use	Prelim
Population	Step (Available)	Effective Date	07/01/2008
Scenario	65	Rule Set Owner	IMXMMM
		Rules Last Applied	05/23/2008 02:11 PM

Generate Report

Enter Report Options:

Link

Title Code

Campus

Accessed from Rule Application Results screen by selecting "Rate Report". To generate the report, enter options (Link, Title Code and/or Campus) and press "Generate Report".

TCR Include/Exclude Report Options Screen

UNIVERSITY OF CALIFORNIA
Office of the President

Userid: IMXMMM Date: 05/23/08 Time: 10:49:10

TCS Include/Exclude Report Options

Description	test hx for user manual	Use	Prelim
Population	Step (Available)	Effective Date	07/01/2008
Scenario	65	Rule Set Owner	IMXMMM
		Rules Last Applied	05/23/2008 02:11 PM

Select Report Type:

Include Report: Report on all rates which were changed by this rule set

Exclude Report: Report on all rates which were NOT changed by this rule set (with options entered below)

Include and Exclude Report: Report on all rates (with options entered below)

Enter Report Options:

Subloc: All TUC REL99

Link: _____

QR Link Range: _____

Accessed from Ruleset Browse or Ruleset Detail screens. Select Report Type (Include or Exclude). If Exclude report type is selected, enter report options shown on screen.

Finalizing a range adjustment

The screenshot shows the 'TCS Rule Set Detail' page. The header includes the University of California logo and 'Office of the President'. The user is identified as 'IMXMMM' on '05/27/08' at '13:53:51'. The main content area displays the following details:

- Description:** test hx for user manual
- Population:** Step (dropdown), Available
- Scenario:** 65
- Use:** Prelim
- Effective Date:** 07/01/2008
- Rule Set Owner:** IMXMMM
- Rules Last Applied:** 05/23/2008 02:11 PM

Below these details is a table with the following data:

Select	Priority	Rule	Type	Campuses	Sublocs	Rep	Value 1	Value 2
<input type="radio"/>	10	1	Single TUC	ALL	ALL	COV	HX	

The left navigation menu includes: Home, Population Extract, Population Browse, Rule Set Browse, Save Rule Set, View Rule, New Rule Set, NewRule, Copy Rule, Delete Rule, Copy Rule Set, Cancel Changes, Apply Rules, Application Results, Finalize Range, Rule Set Report, and Inc/Exc Report.

To finalize a range adjustment/payscale file, press **FINALIZE RANGE** on the left side of the Rule Set Detail Screen. This locks the TCS database and is the point of no return. A green message will appear at the top of this screen which indicates that the range adjustment has been finalized. A batch process must next be run to update new rates in the TCS database, createayscale files and unlock the database.

Reports

Rule Set Report

TCS Rule Set Report - Windows Internet Explorer

http://prod.ucop.edu/netdata-cgi/db2www/tcsrpt01.d2w/main?HideRuleSetOwner=IMXMMM &HideRuleSetOwnerCampus=99&HideRuleSetNo=101&HideR

File Edit View Favorites Tools Help Links >>

Report ID: TCSRPT01 **TITLE CODE RANGE ADJUSTMENT SYSTEM**

Scenario ID: 65 **Rule Set Report** **Report Run Date:** 05/23/2008

Description: test hx for user manual **Step - Effective 07/01/2008 Prelim** **Report Run Time:** 02:36 PM

Rule#	Priority	Type	Pay Rep	Value(s)	Locations	Sublocs	#Records Affected	Int/Shift	Increase or New Amount
1	10	TUC	COV	HX	ALL	ALL	3228		5.00 %
Total							3228		

Done Internet 100%

This report shows the details of all of the rules of a rule set. This report is generated when the user presses "Rule Set Report" from the Rule Set Browse screen.

Rule Application Results Rate Report

Title		TUC/	Pay	Int/	New	Increase		
Link	Code	PERB	Rep	Shift	Rate	or New	Amount	Rule#
027	8938	HX	COV	1	6612.0000	5.00 %	6943.0000	1
		DV	COV	2	6744.0000	5.00 %	7081.0000	1
		DV	COV	3	6880.0000	5.00 %	7224.0000	1
		DV	COV	4	7017.0000	5.00 %	7368.0000	1
		DV	COV	5	7158.0000	5.00 %	7516.0000	1
		DV	COV	6	7301.0000	5.00 %	7666.0000	1
		DV	COV	7	7447.0000	5.00 %	7819.0000	1
		DV	COV	8	7595.0000	5.00 %	7975.0000	1
		DV	COV	9	7748.0000	5.00 %	8135.0000	1
		DV	COV	10	7903.0000	5.00 %	8298.0000	1
		DV	COV	11	8061.0000	5.00 %	8464.0000	1
		DV	COV	12	8222.0000	5.00 %	8633.0000	1
		DV	COV	13	8387.0000	5.00 %	8806.0000	1
		DV	COV	14	8554.0000	5.00 %	8982.0000	1
		DV	COV	15	8724.0000	5.00 %	9160.0000	1
		IR	COV	1	6222.0000	5.00 %	6533.0000	1
		IR	COV	2	6348.0000	5.00 %	6665.0000	1
		IR	COV	3	6475.0000	5.00 %	6799.0000	1
		IR	COV	4	6603.0000	5.00 %	6933.0000	1

This report shows the rule application results (old rate, new rate, % or dollar increase) for a specified link or title code (and optionally campus code). When the user presses "Rate Report" on the Rule Application Results screen, the Rate Report Options screen is presented. After the user enters options and presses "Generate Report", this report is generated.

Include/Exclude Report

Include Report

TCS Include/Exclude Report - Windows Internet Explorer

http://prod.ucop.edu/netdata-cgi/db2www/tcsrpt03.d2w/main?HideRuleSetOwner=IMXMMM &HideRuleSetOwnerCampus=99&HideRuleSetNo=101&HideR

File Edit View Favorites Tools Help Links >>

Report ID: TCSRPT03 TITLE CODE RANGE ADJUSTMENT SYSTEM
 Scenario ID: 65 Included Titles - All Report Run Date 05/23/2008
 Description: test hx for user manual Step - Effective 07/01/2008 Prelim Report Run Time 02:44 PM

Link	Title Code	Title Name	TUC/ PERB	REL99	CTO	Loc	Subloc	Pay Rep	Increase or New Amount	Rule#
026	5421	DIETITIAN, PD	HX	HX	C10	DV	**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
026	5428	DIETITIAN I	HX	HX	C10	BK	**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
027	8938	SCIENTIST SPEC,CLIN LAB,SR	HX	HX	H20	DV	**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
027	8939	SCIENTIST SPECIALIST,CL LAB	HX	HX	H20	BK	**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1
							**	COV	5.00 %	1

Done Internet 100%

Exclude Report

Link	Title Code	Title Name	TUC/PERB	REL99	CTO	Loc	Subloc	Pay Rep	Increase or New Amount	Rule#
026	5421	DIETITIAN, PD	HX	HX	C10	IR	**	UNC		
027	8956	SCIENTIST,CLIN LAB,PER DIEM	HX	HX	H20	SD	**	UNC		
						SF	**	UNC		
027	8959	SCIENTIST,CLIN LAB,SPEC,PD	HX	HX	H20	SD	**	UNC		
027	8997	CYTOTECHNOLOGIST, SR, PER DIEM	HX	HX	H20	SD	**	UNC		
027	8998	CYTOTECHNOLOGIST, PER DIEM	HX	HX	H20	DV	**	UNC		
028	9249	PHARMACIST, PER DIEM	HX	HX	H50	SF	**	UNC		
028	9250	PHARMACIST II, PER DIEM	HX	HX	H50	SD	**	UNC		
029	9315	SOCIAL WORKER, CLINICAL, I	HX	HX	H65	BK	**	UNC		
						DV	**	UNC		
029	9316	SOCIAL WORKER II, CLINICAL P D	HX	HX	H65	SF	**	UNC		
029	9341	SOCIAL WORK ASSOCIATE	HX	HX	H70	BK	**	UNC		
						DV	**	UNC		
029	9342	SOCIAL WORK ASSOCIATE, ASST	HX	HX	H70	BK	**	UNC		
						DV	**	UNC		
029	9393	PSYCHOMETRIST	HX	HX	H70	BK	**	UNC		
						DV	**	UNC		
031	9467	THERAPIST, RECREATION, PD	HX	HX	H80	SF	**	UNC		
031	9471	SPEECH, PATHOLOGIST, PER DIEM	HX	HX	H80	IR	**	UNC		
						SF	**	UNC		

This report lists titles which have or have not been affected by rule application based on options entered on the Include/Exclude Report Options screen. When the user presses "Include/Exclude" report from the Rule Set Browse screen, the options screen is presented. After the user enters report options and presses "Report", this report is generated.

Batch Processing of Range Adjustment

Once an online user has finalized a new set of rates, the batch range adjustment process must be run to apply the new rates to TCS, unlock the database, and create campus payscale files.

Jobs to be run:

- TCSSAUP for stepped titles
- TCSDFUP for shift differential rates
- TCSMMUP for open range titles – do **not** notify campuses regarding availability of payscale files. Payscale files for open range titles contain only min/mid/max rates and may not be used to update employee records. Process open range titles via TCR only when applying an across-the-board increase to open range rates. Otherwise, open range rates must be updated via CICS screens.