

KB – Annual Setup Page

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This procedure outlines the process for setting up a new fiscal year for each institution in the CAT to prepare for the Compensation Administration Business Process.

Purpose and Overview

This KB describes a variety of annual setup and close out activities that take place throughout the Compensation Administration Cycle. Those activities include certain configuration parameters for each institution, the ‘freezing’ or turning off of the automatic feed from HRS, and the activating/locking out of individual CAT users. It will be set up on a yearly basis to meet the needs of each institution.

Annual Set Up

The first tab of annual set up parameters include annual items such as, Overall CAT Rate Calculation type, Action Reason Rate Calculation Type (Flat Dollar Amount vs. Percentage), and Base Increase percent. This is completed annually for each Business Unit by the UW System CAT Administrator.

The second tab of annual set up parameters is called “Data Freeze” and is used to stop the automatic data feed from HRS from updating the fields at the top of the CAT page (Business Unit, Home Dept, Empl Class, Pay Basis, Job Code, FTE, Comprate). This can be set at the divisional level. During set up, this data feed is defaulted to ON for all business units and divisions.

Lock Users

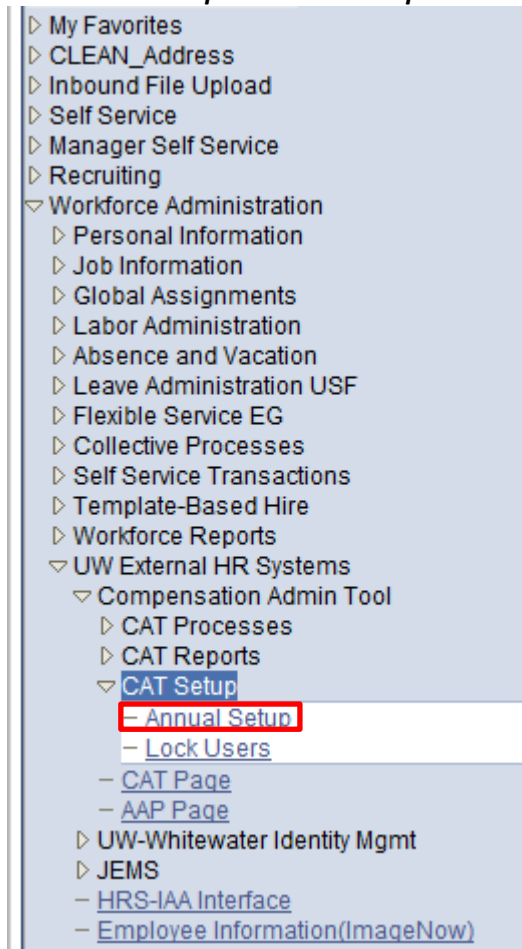
A separate page within the Comp Admin Tool. The first tab of the Lock Users page is intended to manage institutional user access, which is turned on and off throughout the comp admin cycle in order to close out the budget, and when new users are activated/deactivated. At the beginning of each Comp Admin Cycle, the UW Central CAT Admin will need to visit this page and Unlock all CAT users. When a new user is given a CAT security role, the institutional Central CAT Admin will need to visit this page and uncheck the Lock Users box to activate their access.

The second tab on the Lock Users page lists the different security roles associated with the CAT.

Procedure Steps

Annual Set Up

1. The UW System CAT Administrator will send a survey or an email, requesting information from each Institution to complete the different Annual Set Up parameters for the next fiscal year.
2. After the first year using the CAT, this set up configuration will roll over from the previous years' set up.
3. Go to **Workforce Administration > UW External HR System > Compensation Administration Tool > CAT Set Up > Annual Set Up**.



4. Create a new run control.
 - a. The Run Control ID is a unique identifier that saves different values for the run control criteria. Both the update and overwrite methods for the same file will use the same run control.
 - b. While there is no set format for the Run Control ID, a potential suggested format is Initials + next available number (e.g. "ABC01").
 - c. Click either the **"Find and Existing Value"** or **"Add a New Value"** tab depending on what you would like to do.
 - d. Enter the desired **Fiscal Year** and **Business Unit**.
 - e. Click either **"Search"** or **"Add."**
 - f. If you are searching for a run control and it does not exist, you will have the option to create a new run control.

Annual Setup
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing ValueAdd a New Value

▼ Search Criteria

Fiscal Year: = 2018

Business Unit: begins with

SearchClear

Basic SearchSave Search Criteria

Find an Existing Value | Add a New Value

5. User will be routed to Annual Setup page.

Annual Setup

Fiscal Year: 2016 Business Unit: UWADM UW System Administration

Fiscal Year Update/View Status

Open - All Users ☒

Open - UWSA Users Only ☐

Closed - All Users ☐

CAT Rate Calculation Type

Off of Original Base (IPS v1) ☐

Cumulative (IPS v2) ☒

*SFS Ledger for Budget Edits: STD_BUDGET

Calculation Method and Continuing Staff Base by Reason				
Personalize Find View All First 1-7 of 48 Last				
*Reason Code	*Action Reason	*Rate Calculation Type	Include in CSB?	
001	Change in Duties-Reclass	Flat Dollar Amount	<input type="checkbox"/>	+ -
002	Reallocation	Flat Dollar Amount	<input type="checkbox"/>	+ -
003	Promotion/Progression	Flat Dollar Amount	<input type="checkbox"/>	+ -
005	Group Equity	Flat Dollar Amount	<input type="checkbox"/>	+ -
006	Individual Equity	Flat Dollar Amount	<input type="checkbox"/>	+ -
010	Schedule Change (ET,SA)	Flat Dollar Amount	<input type="checkbox"/>	+ -
011	External Rate	Flat Dollar Amount	<input type="checkbox"/>	+ -

Base Increase Percent by Empl Class and Reason				
Personalize Find View All First 1 of 1 Last				
	*Empl Class	*Reason Code	*Action Reason	Base Increase Percent
1	ALL			0.000

Fiscal year Update/View Status

Fiscal Year Update/View Status

Open - All Users ☒

Open - UWSA Users Only ☐

Closed - All Users ☐

6. From the Fiscal Year Update/View Status box select "Open – All Users", "Open – UWSA Users Only" or "Closed – All Users" to determine the access settings for all users.
 - a. **Open – All Users:** Select this option at the beginning of each comp admin cycle. This setting provides access to everyone who has been assigned a CAT security role.
 - b. **Open – UWSA Users Only:** Select this option at the end of the comp admin cycle, when all institutions have submitted their final CAT and all users/divisions have been locked. This setting only provides update access to UW System users (with the TEC HR CAT

Universal Update & Config role), so that UWSA may complete final reconciliation activities.

- g. **Closed – All Users:** Select this option once the comp admin cycle has closed at the UW System Level. In this setting, CAT data for this fiscal year is no longer available to any users. This setting will provide read only access to UW System users (with Universal CAT role) for what is now considering 'historical' CAT data. This option is what the Lookup looks to, to pull in the Fiscal Year to the run control.

CAT Rate Calculation Type

CAT Rate Calculation Type	
Off of Original Base (IPS v1) <input type="radio"/>	Cumulative (IPS v2) <input checked="" type="radio"/>

7. Select either "Off of Original Base (IPS v1)" or "Cumulative (IPS v2)" from the CAT Rate Calculation Type box based on the rate calculation method used at a particular institution. This will match the version of the IPS that a particular institution uses.
 - a. **Off of Original Base (IPS v1):** All compensation increases are calculated off the original comrate (original comrate shown in red square below). If this option is selected, Merit should be row 1, but otherwise order does not matter.
 - i. In the example below, the first row of 1.002% is multiplied by the original comrate of \$34.22 to get the change amount and new comrate. The second row of 2.00% is also multiplied by the original comrate to get the final amount.

CAT Page

Fiscal Year: 2016	Business Unit: UWEAU	Empl Class: CP Univ Staff Ongoing Employment
Name: 	HRS Home Dept: C027600 HUMAN RESOURCES	Pay Basis: H Hourly
Empl ID: Rcd #: 0	Jobcode: 10810 HR PROGRAM OFFICER	Expected Job End Dt:
Position: 02036509	Annual - Min: \$54,876.820 Max: \$126,217.510	Other Active Jobs? N

[Useful Links: HRS Job Data Page](#) [HRS Workforce Summary](#) [HRS Multiple Jobs Summary](#)

Recent and Future HR / Compensation Transactions

Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
06/29/2014	02036509	10810	HR PROGRAM OFFICER	Pay Rt Chg	Market Factor - Classified	1.000000	34.222000	1.000000	71181.760000
06/29/2014	02036509	10810	HR PROGRAM OFFICER	Pay Rt Chg	Pay Plan-Classified	1.000000	33.222000	0.329000	69101.760000

Compensation and Funding Data

Effective Date: 06/28/2015	Planned FTE: 1.000000	Planned Title: HR PROGRAM OFFICER	Automatic HRS Job Data Feed for this Empl Rcd: Active
Rate Calculation Type: Off of Original Base (IPS v1)	Comp Rate: 34.222000	Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/>	

Compensation Change

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	019 - Merit	0.343000	1.002	\$34.565000	\$71,895.000
2 Pay Rate Change	067 - Chancellors Disc Incr.	0.685000	2.000	\$35.250000	\$73,320.000

Final Calculated Compensation as of Effective Date:

Comp Rate = \$35.250
Annual Rate Adjusted for FTE = \$73,320.000

Ok to Load to HRS ☒

Funding Change

GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status
UWEAU	102	027601	1		100.000	1.000000	73,320.000	\$73,320.000000	SFS Edits Passed

Last Update: 08/18/15 12:12:22PM by UW_IPS_LOAD (00453514)

- b. **Cumulative (IPS v2):** All compensation increases are cumulative (calculated off the most recent, updated comrate).

- i. In the example below, the first row of 1.00% is multiplied by the original comprate of \$104,050 to get the change amount and new comprate. The second row of .2% is then multiplied by the new comprate of the row above it (\$105,091) to get the final comprate.

CAT Page

Fiscal Year: 2016
 Name: [REDACTED]
 Empl ID: [REDACTED] Rcd #: 0
 Position: 00685577

Business Unit: UWMSN
 HRS Home Dept: A488300
 Jobcode: C20NN
 Annual - Min: [REDACTED] Max: [REDACTED]

L&S/SOCIOLOGY/SOCIOLOGY
 PROFESSOR

Empl Class: FA Faculty
 Pay Basis: C Academic
 Expected Job End Dt:
 Other Active Jobs? N

Useful Links: [HRS Job Data Page](#) [HRS Workforce Summary](#) [HRS Multiple Jobs Summary](#)

Recent and Future HR / Compensation Transactions

Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
08/24/2015	00685577	C20NN	PROFESSOR	Return from RBK	Start Academic Year	1.000000	104050.000000		104050.000000
07/17/2015	00685577	C20NN	PROFESSOR	Short Work Brk	Seasonal Break	1.000000	104050.000000		104050.000000
07/17/2015	00685577	C20NN	PROFESSOR	Return-LOA	Return From Leave	1.000000	104050.000000		104050.000000

Compensation and Funding Data

Effective Date: 08/24/2015
 Rate Calculation Type: Cumulative (IPS v2)
 Planned FTE: 1.000000
 Planned Title: PROFESSOR
 Comp Rate: 104050.000000
 Add Salary to Continuing Staff Base?: ☐
 Automatic HRS Job Data Feed for this Empl Rcd: Active

Compensation Change

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	067 - Chancellors Disc Incr.	1,041.000000	1.000	\$105,091.000000	\$105,091.000
2 Pay Rate Change	019 - Merit	210.000000	0.200	\$105,301.000000	\$105,301.000
3 Pay Rate Change		0.000000	0.000	\$105,301.000000	\$105,301.000

Final Calculated Compensation as of Effective Date: **Comp Rate = \$105,301.000** Annual Rate Adjusted for FTE = \$105,301.000 ☒ Ok to Load to HRS

Last Update: by

Funding Change

GL Business Unit	Fund	Department	Program	Project	Distribution %	Budgeted FTE	Budgeted Amount	Full Time Rate	Funding Edits Status
					0.000	0.000000	0.000	\$105,301.000000	SFS Edits Unverified

SFS Ledger for Budget Edits

8. The **SFS Ledger for Budget Edits** dropdown is what the Unchecked OK to Load funding splits look to, to decide which set of edits should be running for a particular business unit.
 - a. The two options are:
 - i. Actuals (SFS Edits)
 - ii. CAT (Standard Budget minus SCENARIO and PROJECT)
 - b. The CAT Edits have less edits and allow more flexibility with the funding splits.

CAT Rate Calculation Type

Off of Original Base (IPS v1) ☒ Cumulative (IPS v2) ☐

*SFS Ledger for Budget Edits: **CAT**

Calculation Method and Continuation Reason

*Reason Code	*Action Reason	*Rate Calculation Type	Include in CSB?
001	Change in Duties-Reclass	Flat Dollar Amount	<input checked="" type="checkbox"/>

Calculation Method and Continuing Staff Base by Reason

9. In the Calculation Method and Continuing Staff Base by Reason table, institutions can select which Action Reasons should appear in the CAT drop down and the “Rate Calculation Type” can be selected for each Action Reason.
 - a. The view for this table will default to the first seven action reasons, ordered by reason code. Select view all to see all action reasons available in HRS.

*Reason Code	*Description	*Rate Calculation Type	Include in CSB?		
003	Promotion/Progression	Flat Dollar Amount	<input type="checkbox"/>	+	-
001	Change in Duties-Reclass	Flat Dollar Amount	<input type="checkbox"/>	+	-
002	Reallocation	Flat Dollar Amount	<input type="checkbox"/>	+	-
010	Schedule Change (ET,SA)	Flat Dollar Amount	<input type="checkbox"/>	+	-
005	Group Equity	Flat Dollar Amount	<input type="checkbox"/>	+	-
006	Individual Equity	Flat Dollar Amount	<input type="checkbox"/>	+	-
015	Different Pay Basis	Flat Dollar Amount	<input type="checkbox"/>	+	-
011	External Rate	Flat Dollar Amount	<input type="checkbox"/>	+	-
013	Trainee	Flat Dollar Amount	<input type="checkbox"/>	+	-
019	Merit	Flat Dollar Amount	<input type="checkbox"/>	+	-
016	Prevailing Rate Setting	Flat Dollar Amount	<input type="checkbox"/>	+	-
018	Mandatory	Flat Dollar Amount	<input type="checkbox"/>	+	-
023	Raise to Campus Minimum	Flat Dollar Amount	<input type="checkbox"/>	+	-
020	Pay Plan-Classified	Flat Dollar Amount	<input type="checkbox"/>	+	-
022	Market Factor - Outside Offer	Flat Dollar Amount	<input type="checkbox"/>	+	-
030	Due to Title Appeal	Flat Dollar Amount	<input type="checkbox"/>	+	-
024	Educational Attainment	Flat Dollar Amount	<input type="checkbox"/>	+	-
025	Temporary Change in Duties	Flat Dollar Amount	<input type="checkbox"/>	+	-
040	Recruitment & Retention	Flat Dollar Amount	<input type="checkbox"/>	+	-
031	Re/Activated Rate (FA,AS)	Flat Dollar Amount	<input type="checkbox"/>	+	-

- b. Institutions must first select if they would like to remove any action reasons from the list. To do so, select the minus button next to that action reason.
- c. The two choices for Rate Calculation Type are “**Flat Dollar Amount**” and “**Percentage**”. It is important to set these, so the CAT updated compensation rate (after all increases) recalculates correctly if a change in comprate is pushed from HRS to the CAT.
 - i. When a new comprate is entered in HRS during the comp admin cycle that change is pushed to the CAT.

Effective Date:		Planned FTE:	Redbook Title:	Automatic HRS Job Data Feed for this Empl Rcd:	
06/28/2015		1.000000	HR PROGRAM OFFICER	Active	
Rate Calculation Type: Off of Original Base (IPS v1)		Comp Rate: 32.000000	Add Salary to Continuing Staff Base?: <input checked="" type="checkbox"/>		
Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate	New Annual Comp Rate Adjusted for FTE
1 Pay Rate Change	019 - Merit	0.144231	0.004	\$32.144231	\$66,860.000
Final Calculated Compensation as of Effective Date:		Comp Rate = \$32.144	Annual Rate Adjusted for FTE = \$66,860.000		<input type="checkbox"/> Ok to Load to HRS

- ii. In order to recalculate the updated comprate, either \$ or % must stay the same, while the other value recalculates based on the new base comprate from HRS.
- iii. This logic will also hold true for institutions that use the Cumulative setting and insert compensation rows above/between existing compensation rows.

- iv. In the below example Douglas D's comprate increases, due to a promotion, which has been recorded in HRS. This new comprate (\$97,743.00) from HRS is pushed into the CAT. In this example, the action reason Merit has been set to maintain the original percentage increase in these scenarios, so the merit dollar amount changes from \$977.00 to \$1007.43, recalculating to 1% of the new comprate. Similarly, the action reason Chancellor's Discretionary has been set up to maintain the dollar amount in this scenario. So, the "Chancellor's Discretionary" increase stays at \$1250 and recalculates the percentage amount to 1.23%.

CAT Page

Fiscal Year: 2016
 Name: [REDACTED]
 Empl ID: [REDACTED] Rcd #: 0
 Position: 01297748

Business Unit: UWEAU
 HRS Home Dept: C060212 MATERIALS SCIENCE CENTER
 Jobcode: C20NN PROFESSOR
 Annual - Min: \$55,200.000 Max: \$100,000,000.000

Empl Class: FA Faculty
 Pay Basis: C Academic
 Expected Job End Dt: [REDACTED]
 Other Active Jobs?: Y

Useful Links: [HRS Job Data Page](#) [HRS Workforce Summary](#) [HRS Multiple Jobs Summary](#)

Recent and Future HR / Compensation Transactions

Effective Date	Position Number	Job Code	Title	Action	Action Reason	FTE	Compensation Rate	Change Amount	Annual Comp Rate Adjusted for FTE
08/25/2014	01297748	C20NN	PROFESSOR	Pay Rt Chg	Merit	1.000000	87394.000000	866.000000	87394.000000
08/25/2014	01297748	C20NN	PROFESSOR	Return from RBK	Start Academic Year	1.000000	86528.000000		86528.000000
08/25/2014	01297748	C20NN	PROFESSOR	Pay Rate Change	Promotion	1.00	\$97743.00	\$3000.00	\$100743.00

Compensation and Funding Data

Effective Date: 08/24/2015
 Rate Calculation Type: **Off of Original Base (IPS v1)**
 Planned FTE: 1.000000
 Redbook Title: PROFESSOR
 Comp Rate: 97743.000000
 Add Salary to Continuing Staff Base?: ☒
 Automatic HRS Job Data Feed for this Empl Rcd: **Active**

Compensation Change

Action	Action Reason	Change Amount (\$)	Change Percent (%)	New Comp Rate
1 Pay Rate Change	019 - Merit	977.000000	1.000	\$98,720.000000
2 Pay Rate Change	067 - Chancellors Disc Incr.	1,250.000000	1.279	\$99,970.000000
Final C	Merit	\$1007.43	1.00%	\$101750.00
	Chancellors Disc.	\$1250.00	1.23%	\$103000.00

Last Update: 07/23/15 3:29:42PM

Merit increase percentages stay the same, \$ amounts recalculate

Other increase dollar amounts stay the same, percentages recalculate

- d. All action reasons default to the Rate Calculation Type of Flat Dollar Amount except for 019 Merit which defaults to Percentage.

Calculation Method and Continuing Staff Base by Reason					Personalize Find View All [Icons]		First	1-7 of 48	Last
*Reason Code	*Description	*Rate Calculation Type	Include in CSB?						
001	Change in Duties-Reclass	Flat Dollar Amount	<input type="checkbox"/>						
002	Reallocation	Flat Dollar Amount	<input type="checkbox"/>						
003	Promotion/Progression	Flat Dollar Amount	<input type="checkbox"/>						
005	Group Equity	Flat Dollar Amount	<input type="checkbox"/>						
006	Individual Equity	Flat Dollar Amount	<input type="checkbox"/>						
010	Schedule Change (ET,SA)	Flat Dollar Amount	<input type="checkbox"/>						
019	Merit	Percentage	<input type="checkbox"/>						

- e. The “Include in CSB” indicator determines whether or not a particular action reason is included when calculating the sum of all salaries for the Continuing Staff Base. This parameter is important for the CAT summary page which tracks against a unit’s Continuing Staff Base and merit allocation.
- If the formula for calculating the Continuing Staff Base is: Sum off the salaries of all eligible employees before all rate increases, then the ‘Include in CSB’ checkbox should remain unchecked for all action reasons.
 - If the formula for calculating the Continuing Staff Base is: Sum of the salaries of all eligible employees after all rate increases except merit, then the ‘Include in CSB’ checkbox should remain checked for all action reasons except for Merit.
 - The CSB checkbox next to the Action Reason Merit should always be unchecked

*Reason Code	*Description	*Rate Calculation Type	Include in CSB?		
001	Change in Duties-Reclass	Flat Dollar Amount	<input type="checkbox"/>	+	-
002	Reallocation	Flat Dollar Amount	<input type="checkbox"/>	+	-
003	Promotion/Progression	Flat Dollar Amount	<input type="checkbox"/>	+	-
005	Group Equity	Flat Dollar Amount	<input type="checkbox"/>	+	-
006	Individual Equity	Flat Dollar Amount	<input type="checkbox"/>	+	-
010	Schedule Change (ET,SA)	Flat Dollar Amount	<input type="checkbox"/>	+	-
019	Merit	Percentage	<input type="checkbox"/>	+	-

Base Increase Percent by Empl Class and Reason

10. This section is used to reflect pay plan guidelines for a set Merit (or other action reason) percentage. Enter “the Action Reason” and “Base Increase Percent” into Base Increase Percent based on the Board of Regent or institutional Pay Plan Guidelines. This will be used in the CAT Summary report to track Merit Available vs. Merit Allocated.
- Description is the long name of the Action Reason Code (i.e. Merit)
 - Employee Class can be specified if the pay plan guidelines indicate specific percentages for specific employee classes.

	*Empl Class	*Reason Code	*Description	Base Increase Percent		
1	ALL	019	Merit	1.000	+	-

11. Select “Save” followed by “Add” at the bottom of the page to add the system parameters for the selected Business Unit and Fiscal Year.

Save

Return to Search

Notify

Add

Update/Display

Annual Setup | [Data Freeze](#)

Annual Setup

Find an Existing Value

Add a New Value

Fiscal Year: 2016

Business Unit: UWOSH

Add

[Find an Existing Value](#) | [Add a New Value](#)

- Users SHOULD NOT change any section of the set up after the initial set up (during the comp admin cycle). To do so could alter employees' final compensation rates.

Data Freeze

- When the time comes to perform final reconciliation, each institution will select a date to turn off the automatic job data feed from HRS.
- To turn the data feed off, to finalize your CAT numbers, navigate to **Workforce Administration > UW External HR Systems > CAT Set Up > Annual Set Up > Find or Add a New Value > Data Freeze**.
- Select the Data Feed Stopped? Checkbox to turn the automatic feed off.

Annual Setup

Data Freeze

Fiscal Year: 2016 Business Unit: UWGBY UW Green Bay

Lock All

Unlock All

Division	Division Name	Data Feed Stopped?	Last Updated By	Last Update Date/Time
D01	DIV-GENERAL EDUCATIONAL ADMIN	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D03	DIV-ATHLETICS	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D09	DIV-INTRAMURALS AND RECREATION	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D12	DIV-ACADEMIC AFFAIRS	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D13	DIV-OUTREACH AND ADULT ACCESS	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D14	DIV-STUDENT SERVICES	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D18	DIV-DEAN OF STUDENTS	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D26	DIV-LIBERAL ARTS AND SCIENCES	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D30	DIV-PROFESSNL AND GRAD STUDIES	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D33	DIV-COMPUTING & INFO TECH	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D40	DIV-BUSINESS AND FINANCE	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D45	DIV-FACILITIES PLANNING & MGMT	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D50	DIV-UNIVERSITY UNION	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D55	DIV-WEIDNER CNTR FOR PERF ARTS	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D65	DIV-UNIVERSITY ADVANCEMENT	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM
D99	DIV-STUDENT WORK-STUDY PROGRAM	<input type="checkbox"/>	00173821	08/11/15 12:48:10PM

16. This can be executed at the Divisional level, or for an entire institution at once.

User Access Set Up

This page is used to 'lock' users, especially towards the end of the budgeting cycle. When a user is locked, their access is switched to View Only. When a user is unlocked, their access is switched to Update (if they have that role). If a user only has the View only role, they will remain view only regardless of if they are locked or unlocked. At the beginning of each Comp Admin year and when a new user is given a CAT security role, the UW System CAT Admin must visit this page and unlock them in order for the new user to be given their full access.

1. Go to **Workforce Administration > UW External HR System > Compensation Administration Tool > CAT Set Up > Lock Users.**



2. Enter "HR Deptid" and "Row Level Security" in search criteria.
 - Click the magnifying glass beside the "HR Deptid" and "Row Level Security" fields to display a list of all available options for the selected field.
 - Optional to enter "Security Role", "Last Name", "Employee ID" and "Access Status" in order to narrow search criteria.
3. **Select** Search to pull results based on search criteria entered.

A screenshot of the "Lock Users" search form. The title "Lock Users" is in a blue box at the top left. Below it are several search fields: "*HR Deptid:" with a text box containing "UWS" and a magnifying glass icon (highlighted with a red box); "Security Role:" with an empty text box and a magnifying glass icon; "*Row Level Security:" with a text box containing "ALL" and a magnifying glass icon (highlighted with a red box); "Last Name:" with an empty text box; "Employee ID:" with an empty text box; and "Access Status:" with a dropdown menu. At the bottom is a "Search" button.

4. In the CAT Users Table check the "Lock User" box to change user access from view to update.
 - Boxes that are unchecked are unlocked (users have full access to the CAT).

CAT Users										Lock All	Unlock All
User ID	Empl ID	Business Unit	HR Department	Description	Name	Last Name	Row Level Security	Security Role	Lock User		
00699009	00699009				VIVEK CHERIAN	CHERIAN	ALL	UW_TEC_HR_CAT_CONFIG	<input type="checkbox"/>		
HREE610							UWEAU	UW_UNV_HR_CAT_FUNCTIONAL	<input type="checkbox"/>		
00793622	00793622				MALLORY WHEATON	WHEATON	ALL	UW_TEC_HR_CAT_CONFIG	<input type="checkbox"/>		
00499252	00499252				KEVIN SIPPL	SIPPL	ALL	UW_TEC_HR_CAT_CONFIG	<input type="checkbox"/>		
00830576							ALL	UW_SSC_HR_CAT_ADMIN	<input type="checkbox"/>		
00830577							ALL	UW_SSC_HR_CAT_ADMIN	<input type="checkbox"/>		
HREE611							A0620	UW_UNV_HR_CAT_FUNCTIONAL	<input type="checkbox"/>		

5. Select save to enact all changes made.

- If the Lock User checkbox is checked, Kevin Sippl will be switched to “Read Only” access, even though he has a full UWSA Universal Security Role assigned.

Lock Users

*HR Deptid: UWS

Security Role:

*Row Level Security: ALL

Last Name:

Employee ID:

Access Status:

Search

Lock All

Unlock All

CAT Users										Lock All	Unlock All
User ID	Empl ID	Business Unit	HR Department	Description	Name	Last Name	Row Level Security	Security Role	Lock User		
00499252	00499252				KEVIN SIPPL	SIPPL	ALL	UW_TEC_HR_CAT_CONFIG	<input type="checkbox"/>		
00699009	00699009				VIVEK CHERIAN	CHERIAN	ALL	UW_TEC_HR_CAT_CONFIG	<input type="checkbox"/>		
00793622	00793622				MALLORY WHEATON	WHEATON	ALL	UW_TEC_HR_CAT_CONFIG	<input type="checkbox"/>		
00830576							ALL	UW_SSC_HR_CAT_ADMIN	<input type="checkbox"/>		
00830577							ALL	UW_SSC_HR_CAT_ADMIN	<input type="checkbox"/>		
HREE610							UWEAU	UW_UNV_HR_CAT_FUNCTIONAL	<input type="checkbox"/>		
HREE611							A0620	UW_UNV_HR_CAT_FUNCTIONAL	<input type="checkbox"/>		

