PUBLICSALARY
CityTech USA, Inc.

USER GUIDE

I. Introduction

User Account Management

PublicSalary offers members full control of their account:

- managing account balance/payment information
- billing and account contact information
- creating and assigning additional users per account

Cross-sector Design

By design, PublicSalary allows cross sector analysis to its members. Data is provided under a unified host of salary and benefit data from different public agencies: *municipalities, park districts, community colleges, counties, and forest preserve districts*.

Unlimited Comparable Creation

PublicSalary allows the creation of multiple comparable groups. This feature allows the comparison of data against different sets of agencies, e.g., fire unions, clerical employee unions, etc. In addition, multiple comparables are more attractive when selecting comparable agencies from different sectors as the sector boundaries are eliminated.

Comprehensive Benefit Analysis

PublicSalary allows members to enter and compare benefits by user defined items based on contribution levels (hours, percentage, or direct dollars). More importantly, the benefit section allows members to associate benefits to a particular position(s) so that a full cost description of the position can be demonstrated; making the analytical data an invaluable factor for the decision-making process.

Advanced Data Entry

Salary data is stored under a two-tier structure:

Position Categories: are predefined categories similarly structured like department names, defined by each sector. In other words, *Position Categories* are uniquely setup for each public agencies' needs and definitions. While entering data, your membership defines which sector you belong to, thus allowing you to select proper categories for comparison.

Position Template: are predefined templates, consisting of a common title (Finance Director, Accountant II, etc) that may be changed to meet the needs of your organization's position title along with a short description that describes the template for better comparison purposes later. *Example*: one member's position may be titled "Executive Secretary, meanwhile the same position may be titled as "Executive Administrative Assistant" even though they were chosen from the same starting position template. This feature allows public agencies to make meaningful comparisons although the position titles may differ.

Job Description: for each position template also offers a generic job description. Users can modify the generic job description to reflect the nature of position in their own agency. It is suggested that unless there is significant differences between the generic job description and that of your agency,

the generic job description remain unchanged.

General Data Entry Rules

<u>Always SAVE your work!</u> PublicSalary is a web-based application. Any new data and/or changes will be lost if you fail to save your work before clicking anywhere else

<u>Required Fields.</u> If a required field is left empty, the system will not allow you leave. Required fields are indicated by bold fonts.

II. Navigation

1. Logging in

PublicSalary uses member email addresses as login names. In the event a member forgets his/her password, click "forgot your password." Follow the steps and PublicSalary will automatically reset and send the new password to the email address on file.

2. Component Introductions

Dashboard — is the default page users see after logging in. It serves as a member bulletin board where program announcements, member events, and technical notes are posted.

Account Management — is available only to the main account holder. For security reasons, all secondary users will not be able to see this function.

Click My Account in the right-upper corner (next to Logout). At the right side of the screen, there is an account management box listing three (3) management options:

Account Information — manage billing and contact information. NOTE — a member will be able to cancel their membership. Please read the instructions carefully. Once the membership is cancelled, it will require the member to contact CityTech USA Inc directly to re activate the membership.

> **User Settings:** manage current member accounts and add new secondary members
> **User Security:** manage current user's security levels

Organization — basic information regarding the agency and salary information. A comparative report can also be generated under this option.

Comps — This option allows members to select various collections of comparable agencies for their analysis. Before meaningful reports can be generated, at least one collection has to be established.

Collections can contain agencies from different types of sectors, e.g., municipalities, park districts, etc., and they can be set for different employee groups, i.e., fire union, police union, clerical employees union, etc.

Positions — This section contains all of the salary information members entered and share with other members. The program offers many advanced features for members to enter, store, retrieve and compare their data. Please refer to the following section for more detailed data entry and analysis operations.

Benefits — constitute an important part of the cost for employers. This section allows members to enter cost for any type of benefits that associate with any given position entered in the program for advanced analysis

Document Management — The program has a document management component that allows members to share any HR related files. The advanced search function enables members to conduct very sophisticated search among thousands documents members stored in the program.

III. Dashboard

As briefly described, the dashboard is the default login screen that every user will see. This screen serves many purposes: announcements, member events, and technical notes. You may close any informational window(s) by clicking in the upper right-hand corner of the message.

Mail list

Communication is important amongst members and therefore the mail list allows members to send emails message to one another about topic specific questions.

Create Mail list Message

1. Verify your **From** email address. If it has changed please make the appropriate changes under the **Account Management** area of the application
2. Select » **To** (list of comparables)
3. Type » **Subject**
4. Type » **Message** (this is just like composing a regular email message)
5. Click » **Send Email**

Account Status Message: Dormant

PublicSalary has many triggers behind the scenes to make sure that all members are accountable to data accuracy. Occasionally you may receive an email when a position(s) in your account might cause your account to default to a dormant status. (*see Section X. Status Definitions*)

In addition to an email, the dashboard will present you with the same message. Your action to this message is to correct the positions in question or **Justify** the account.

Justify Your Account

Explain any reasons (labor/union negotiations) or circumstances (COLAs defered for 3 months) which prevent you from updating your position data. Justifications are valid for **90 days**, after which time your data must be updated or your account justified again.

1. Click » **Justify your Account**
2. Type » **Subject** (explain why the position(s) needing updating cannot be at this time)
3. Click » **Save Changes**

IV. Account Management

Account Information

Data provided in this section expedites professional and timely communication between your agency and CityTech USA Inc. We **strongly** suggest reviewing this information yearly, if not more frequently, to help maintain invoicing, account status, mailing and billing addresses, user accounts, and security setting information.

User Settings

User settings allow you to create, edit, or delete any given user.

Create a New User

1. Click » **Add New User** (right menu)
2. Type » **Display Name**
3. Type » **Login / Email**
4. Type » **Phone**
5. Type » **Password**
6. Retype » **Password Again**
7. Click » **Save Changes**

Edit a User

1. Click » **Edit** (menu in user account)
2. Make changes to account
3. Click » **Save Changes**

Delete a User

1. Click » **Delete** (menu in user account)
2. Confirm delete action
3. Click » **Ok**

User Security

By default, newly created users have <u>read-only</u> access to data. To grant them edit rights, simply click on the **Edit Security** and check the box(es) that the user will now have edit rights to and click **Save Changes**.

V. Comparables

Comparables are the building blocks that all data can be examined and reported on within the application. As a member you may setup as many comparable groups as you wish (e.g. all in my state, All EAV greater than 1M, etc).

Create New Comparable

1. Click » **Create New Collection** (right menu)
2. Type a name for this comparable (e.g.)
3. Click » **Edit** at anytime to rename the title of the comparable collection.

<u>**Basic Search**</u> (right menu)
Basic search allows the member to add other members simple by typing the other members organization name. Example: start typing "Addison", this example will bring up organizations that have these letters in them. To add the member to this newly create comparable set, just click on the **ADD** text in front of the organization's name.

Basic search also allows you to apply filters to your search. Click **Filter your search** below the search box for examples of this feature.

<u>**Advanced Search**</u> (right menu)

As indicated this search allows members to add comparables based on **area(sq mi), EAV, fiscal year budget, general fund revenue, population, property tax, sales tax**, and **total payroll**.

Select from the drop down the item that you wish to search against and enter the numeric value and the list will show you the members that fall within that search.

<u>**Add all...**</u> : this option is available to members that wish to add everything from the search results at once instead of selecting each result individually.

Delete a single member within a Comparable

1. Click » **Delete** (trash can icon) next to the name of the organization.

Delete <u>all</u> members within a Comparable

1. Click » **Remove All Comparables** (right menu) this removes ALL members in the current comparable collection.

Delete a Comparable Collection

1. Click » **Delete** (trash can icon) far right of the name of the organization.
2. Click » **OK** to confirm or **Cancel** to exit this action.

Comparable Accountability

This feature allows a member to see which other members have chosen them as a comparable and rely on them to maintain their data. Click **More »** to see the list.

VI. Positions

The intuitive design of the program makes the data entry a very easy task. The following is a step-by-step example of data entry.

Create A Position

1. Click » **Positions** (menu)
2. Click » **Create New Position** (right menu)
3. **Sector**: Select » **Municipalities** (or your prefered sector)
4. **Category**: Select » **Administration** (Asst City Manager is part of this category)
5. **Template:** Select » **Deputy/Assistant Village/City Manager**
6. **Title:** enter the exact title within your organization for this position.
7. **Description:** if necessary, make any minor changes to the job description
8. Click » **Save Changes**

Additional information about the position, personnel, and salary have been categorized into sections as described below:

Position Information:

- **Effective Date**: the date the position was instated
- **Hours / year**: total annual working hours
- **Pay Type**: Salaried/Hourly
- **Job Type**: Full/Part Time
- **Union**: Yes/No
- **Exempt**: Yes/No

Personnel Information:

- **Hire Date**: the date, the current staff member was hired.
- **Description Match**: how different your job description is from the default job description
- **Years in Position**: number of years the current staff member has occupied the position
- **Years in the Field**: number of years the current staff member has been in the given field
- **# of Positions**: number of positions defined by this template
- **Actual Salary**: single staff member, enter actual salary of the current staff member
- **Average Salary**: multiple staff members, enter average salary of all current staff members

Salary Information: enter MIN, MID, and MAX salary range for this position

Supporting Documents: attach your job description (pdf, txt, doc, etc) directly to the job position. If you have a larger file that contains multiple job descriptions, please refer to the Documents section

Prospect A Position

Looking for information on a position that you currently do not have in your organization? Prospect a Position allows you to find out information related to this possible position.

1. Click » **Positions** (menu)
2. Click » **Prospect a Position** (right menu)
3. **<u>Comparable</u>**: Select » **Default** (or any other comparable collection)
4. **<u>Sector</u>**: Select » **Municipalities** (or your prefered sector)
5. **<u>Category</u>**: Select » **Administration** (Asst City Manager is part of this category)
6. **<u>Template</u>**: Select » **Deputy/Assistant Village/City Manager**
7. **<u>Title & Description</u>**: template information is displayed for your information
9. Click » **Use these settings**

Now that the template has been selected along with a comparable collection you may now begin to enter data for **Range Min, Range Mid, Range Max, Actual, or Actual Ave**. You may use actual dollar figures ("Value" column) or percentages ("Percentile" column). Whichever you choose to enter, PublicSalary will calculate and display the item in the opposite column.

Click » **Run Report** to have your data displayed in report form.

Range Increase

1. Click » **Positions** (menu)
2. Select a position(s) (using check boxes)
3. Click » **Range Increase** (right menu, under Position Actions)
4. Enter » **Effective Date**
5. Enter a percentage (3% = 3.0) or dollar ($1000) amount in each field independently or leave a field blank to avoid changing the position's data: **Range Min, Range Mid, Range Max, Actual, or Actual Ave**
6. Review your changes at the bottom of the page before committing
7. Click » **Save Changes**

Quick Update

This action allows the end user to enter the known salary data for a single or multiple positions with your organization.

1. Click » **Positions** (menu)
2. Select a position(s) (using check boxes)
3. Click » **Quick Update** (right menu, under Position Actions)
4. Enter » **Effective Date**
5. Enter the new dollar amount in each field independently or leave a field blank to avoid changing the position's data: **Actual, Actual Ave, Range Min, Range Mid, or Range Max**
6. Click » **Save Changes**

Clone A Position(s)

This action allows a user to easily create a duplicate version of a current position.

1. Click » **Positions** (menu)
2. Select a position(s) (using check boxes)
3. Click » **Clone** (right menu, under Position Actions)

Delete A Position(s)

This action allows a user to easily delete one or many positions.

1. Click » **Positions** (menu)
2. Select a position(s) (using check boxes)
3. Click » **Delete** (right menu, under Position Actions)

List Position(s)

This action allows a user to easily select one or many positions and view a list of them with a default view of **Title, Category, Effective Date, Min, Mid, Max, Actual, Act. Ave, and Hrs/Yr.**

1. Click » **Positions** (menu)
2. Select a position(s) (using check boxes)
3. Click » **List** (right menu, under Position Reports)

Compare A Position(s)

This action allows a user to easily select one or many positions (up to 6) to compare a list of comparables.

1. Click » **Positions** (menu)
2. Select a position(s) (using check boxes)
3. Click » **Compare** (right menu, under Position Reports)

Snapshot

This action allows changes to be made to a position prior to the effective date. Entering a future effective date is the most common action taken using this feature. Upon creating a new effective date the application will automatically make a new snapshot for the current position. In addition, when a new snapshot is made to the current position, the system keeps a running history of the old data for various analyses, e.g., growth trend, growth rate, etc.

1. Click » **Positions** (menu)
2. Select a position's title to edit
3. Click » **New Snapshot** (right menu, under Snapshot)
4. Enter » new date
5. Click » **Create**
5. Begin editing newly created snapshot

VII. Benefits

The benefit section of the program is designed to capture the cost to a given position in addition to salary, so that when comparing a position with that of other agencies, the total cost of the position can be obtained. When entering benefit data, items must be associated to positions to which the benefit applies.

Create A Benefit(s)

1. Click » **Benefits** (top menu)
2. Click » **Create New Benefit** (right menu)
3. **Category**: Choose » **Health Care**
4. **Name**: Type a title (e.g. PPO High Deductible)
5. **Description**: Explain the item in more detail. (e.g. "Under the high deductible option, employee pays the first $300 for single coverage; $500 for family coverage").
6. Click » **Save Changes**

Create New Contribution level(s)

1. Click » **Make a new** under contribution level (right menu)
2. Click/Type » a name for this contribution level (clickable suggestions are below the textbox)
3. **Employer**: Type » a monthly dollar amount (e.g. $500)
4. **Employee**: Type » a monthly dollar amount (e.g. $300)

Add Associated Position(s)

Note: positions need to be created before a benefit item can be associated to it.

1. Type » in textbox under **Manage Positions** (right menu) the title of the position. If several directors in the agency have this option and the word "director" is in all the position titles, simply type "director". If all positions in your agency receive this benefit type "all" and a list of all positions enter will display.
2. Select » each individual position by clicking **Add** in front of the title. Or select **Add all...** from under the textbox to add of the items in the result list.

Clone A Benefit(s)

This action allows a user to easily create a duplicate version of a current benefit.

1. Click » **Benefits** (menu)
2. Select a benefit(s) (using check boxes)
3. Click » **Clone** (right menu, under Benefit Actions)

Delete A Benefit(s)

This action allows a user to easily delete one or many benefits.

1. Click » **Benefits** (menu)
2. Select a benefit(s) (using check boxes)
3. Click » **Delete** (right menu, under Benefit Actions)

List Benefit(s)

This action allows a user to easily select one or many benefits and view a list of them with a default view.

1. Click » **Benefits** (menu)
2. Select a benefit(s) (using check boxes)
3. Click » **List** (right menu, under Benefit Reports)

Compare A Benefit(s)

This action allows a user to easily select one or many positions (up to 6) to compare a list of comparables.

1. Click » **Benefits** (menu)
2. Select a benefit(s) (using check boxes)
3. Click » **Compare** (right menu, under Benefit Reports)

VIII. Documents

Document sharing is a big plus in today's age of technology. This section allows members to upload documents to the application to be shared by all.

Create A Document(s)

1. Click » **Documents** (menu)
2. Click » **Create New Document** (right menu)
3. **Name**: Give this document a meaning full name (e.g. 2008 Employee Handbook)
4. **Category**: Select » **Personnel Manual**
5. **Effective On**: Enter the date to which this document is valid
6. **Ending On**: Enter the date to which this document is invalid or expires
7. **Summary**: Enter a brief description of what this document is about, or if this a newer document replacing an older, expired one, then briefly described what has changed (e.g. Chpt 7 has been deleted, Chpt 10 as new uniform policy, etc.)
8. File Attachment: Click » **Browse** to find the file locally on your floppy drive, CDROM drive, or network drive and click **OK**
9. Click » **Save Changes**

Delete A Document(s)

This action allows a user to easily delete one or many documents.

1. Click » **Documents** (menu)
2. Select a document(s) (using check boxes)
3. Click » **Delete** (right menu, under Document Actions)

Search A Document

This action allows a user to easily find documents.

1. Click » **Documents** (menu)
2. Click » **Search Documents** (right menu)

You may search documents by any of three options or all combined together.

3. **Comparable Collection**: select from the list of create comparable collections that you wish to search on specifically.
4. **Document Category**: choose the category of document.
5. **Search Text**: enter a search keyword that would help you find the document of choice.
6. Click » **Search Documents**

IX. Reports

Report functionality can be found in the **organization**, **positions**, and **benefits** sections. They may only be ran when one or more comparable collections have been created.

Typically one would select a position(s)/benefit(s) and choose either **List** or **Compare** from under the reports action area (right menu). Further details on these option can be found in their respective sections.

Settings & Customization

After selecting your specific items and choosing either **List** or **Compare** from under the reports action area (right menu) your results whould be displayed in the reports section. One can customize their report by changing the **report name**, **comparable collection**, **sort by**, and **columns** to be displayed.

Report Changes

1. Click » **Change settings** (menu)
2. **Report Name**: Simply type the name that you wish for this report.
3. **Comparable Collection**: select from the drop down which comparable collection you wish display on this report.
4. **Sort by**: select a column name to sort by and whether it is **ascending** or **descending**.
5. **Column Order**: allows the user to drag and drop columns from one side to another and move them up or down depending on how the end report columns are suppose to be displayed.

Column Order: Add Columns

1. Select from the **Available Columns** box (right) and click and drag that column name on to the **Current Columns** box (left). Continue to perform this function until you achieve the desired results.
2. Click » **Save Change**

Column Order: Remove Columns

1. Select from the **Current Columns** box (left) and click and drag that column name on to the **Available Columns** box (right). Continue to perform this function until you achieve the desired results.
2. Click » **Save Change**

Column Order: Reordering Columns

1. Select from the **Current Columns** box (left) and click and drag that column name up or down through the list until you find the desired point. Continue to perform this function until you achieve the desired results.
2. Click » **Save Change**

Export

1. Select » **CSV** (comma seperated value) from the menu and save the results to your PC. These results can be opened used in your favorite spreadsheet program for further manipulation/calculations or visual representation (charts/graphs).

X. Status Definitions

Dormant Status

To help facilitate accuracy of member data, PublicSalary contains automated checking tools called triggers.

Dormant Status is a trigger which runs monthly to detect if the effective date of your position is greater than 12 months old. If Dormant Status finds member position data greater than 12 months, it sends an email reminder to that member that data updating is needed.

If no action is taken to update the effiective date in the next 90 days, Dormant Status automatically turns the reporting function off for that member until all positions are updated and current. Until then, the member can only update data; no reports can be generated.

Dormant Status additionally polices members' accounts making sure the ratio of positions entered by any given member and their comparable agencies is within check.