
PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting

November 2010

Copyright © 1988, 2010, Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

Hazardous Applications Notice

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Contents

Preface

PeopleSoft Human Resources Manage Base Compensation and Budgeting Preface	xi
PeopleSoft Products	xi
PeopleSoft Application Fundamentals	xi
PeopleBooks and the PeopleSoft Online Library	xii
Common Elements Used in This PeopleBook	xii

Chapter 1

Getting Started With Base Compensation and Budgeting	1
Base Compensation and Budgeting Business Processes	1
Base Compensation and Budgeting Implementation	1

Chapter 2

Understanding Base Compensation and Budgeting	3
Base Compensation and Budgeting	3
Prerequisites	3
Base Compensation and Budgeting Business Processes	4
Salary Administration Plans	4
Base Compensation Budgets and Plans	4
Mass Salary Increase Processes to Update Salaries	5
Summary Data and Reports	5
Base Compensation and Budgeting Integrations	5
Base Compensation and Budgeting Program Design	6
(FRA) Salary Forecasting Process Design	6
Salary Plan Administration	7

Chapter 3

Setting Up Base Compensation and Budgeting	9
Defining Salary Increase Guidelines Using a Configurable Matrix	9
Pages Used to Define Salary Increase Guidelines Using a Configurable Matrix	9

Defining a Salary Increase Matrix Using a Configurable Matrix	10
Defining Inputs for Salary Increase Matrices	11
Defining Outputs for Salary Increase Matrices	12
Defining Search Keys	14
Defining Data Content for Salary Increase Matrices	15
Viewing Matrix Results	16
Setting Up Salary Plans, Grades, and Steps	16
Understanding Salary Plan Setup	17
Pages Used to Set Up Salary Plans, Grades, and Steps	18
Defining a Salary Increase Matrix	19
Defining Salary Plan Characteristics	21
Setting Up Salary Grades	24
Associating Salary Grades With Labor Agreements	25
Associating Salary Components With Salary Steps	26
Setting Grade Advance Criteria	30
(USF) Establishing Salary Steps Within a Salary Grade	31
Running Salary Grades and Salary Steps Reports	33
XML Publisher for PeopleSoft Reports	33
Pages Used to Run the Salary Grades and Salary Steps Reports	33
Running the Salary Grade/Step Tables Report	34
Setting Up Base Compensation Budgeting and Planning	35
Understanding Salary Increase Budgeting and Planning	35
Pages Used to Set Up Salary Increase Budgeting and Planning	35
Defining Budget Types	36
Defining Budget Default Values	37
Establishing Group Default Control Values for Base Compensation Budgets and Plans	39

Chapter 4

Administering Salary Plans, Grades, and Steps	41
Understanding Salary Plans	41
Currency Defaults and Conversion in Salary Plans	41
Understanding Salary Increase Guidelines	42
Understanding Salary Grades and Steps	43
(JPN) Setting Grade Advance Criteria	43
Administering Compensation with Salary Plan Defaults	44
Assigning Default Salary Plans, Grades, and Steps to a Worker	45
Tying Salary Plans to Job Codes, Locations, or Labor Agreements	45
Associating Salary Plans and Grades to Military Ranks	46
Administering Salary Increases	46
Understanding Salary Increase Administration	46
Entering Salary Changes in the Job Data Pages Manually	46
Common Elements Used in This Section	47

Pages Used to Run the Automated Step Increase Process	47
Entering Salary Increases by Using the Automated Step Increase Process	48
Moving Workers to the Next Step	48
(E&G) Moving Workers to the Next Step	50
Viewing Worker Salary Structure Information	52
Viewing Compa-Ratios	52
Viewing Range Calculations	52
Reporting Worker Salary Structure Information	53
Pages Used to Run Worker Salary Structure Reports	54
(JPN) Running the Grade Advance Candidates Report	56

Chapter 5

Using Configurable Matrices	59
Understanding Configurable Matrices	59
Examples of Configurable Matrices	59
Understanding Matrix Inputs and Outputs	61
Understanding Matrix Types	62
Understanding Matrix Displays	63
Defining Sources for Configurable Matrices	64
Understanding Source Types	65
Common Elements Used in this Section	66
Pages Used to Define and Maintain Sources for Configurable Matrices	67
Defining Sources Based on Addresses	68
Defining Sources Based on Dates	69
Defining Sources Based on Ratios	70
Defining Sources Based on Performance Ratings	71
Defining Sources Based on Employee Information	72
Defining Sources Based on Related Employee Information	73
Defining Sources Based on Position Information	75
Defining Sources Based on Related Position Information	76
Defining Sources Based on Geographical Areas	77
Defining Sources Based on Salary Grade Step Rates	78
Defining Sources Based on Length of Time	79
Defining Sources Based on Supplied Information	81
Defining Sources Based on a Matrix	82
Defining Results for Configurable Matrices	84
Understanding Results for Configurable Matrices	84
Common Elements Used in this Section	85
Pages Used to Define and Maintain Results for Configurable Matrices	85
Defining Results Based on the SIMPLECHAR Result Type	86
Defining Results Based on the SIMPLENUM Result Type	87
Defining Results Based on the SIMPLEDATE Result Type	88

Defining Results Based on the INCRBYAMT Result Type	89
Defining Results Based on the PCNTOFBASE Result Type	91
Defining Results Based on the THRESHOLD Result Type	92
Defining Results Based on the SOURCE Result Type	93
Defining Results Based on the MATRIX Result Type	95
Defining and Maintaining Configurable Matrices	96
Common Elements Used in this Section	96
Pages Used to Define and Maintain Configurable Matrices	97
Defining Matrices	97
Defining Inputs for Matrices	99
Defining Matrix Output Information	103
Defining Search Keys for Configurable Matrices	105
Loading Values from the Prompt Table	107
Entering Data Content Fields	109
Viewing Matrix Results	110
Using Special Rules to Create Configurable Matrices	111
Copying Matrices	113
Page Used to Copy Configurable Matrices	113
Copying Matrices	113

Chapter 6

Reviewing Worker Performance History	117
Common Elements Used in This Chapter	117
Viewing Worker Review Information	117
Pages Used to Access Worker Reviews	118
Accessing Worker Reviews	118
Accessing Reviewer Comments	121
Reviewing Employee Goals	123
Reporting on Worker Reviews	124
Page Used to Run the Employee Review Audit Report	125

Chapter 7

Budgeting and Planning Salary Increases	127
Understanding the Base Compensation Budgeting and Planning Business Process	127
Common Elements Used in This Chapter	128
Calculating Base Compensation Budgets	128
Understanding Base Compensation Budgeting Procedures	129
Understanding Budget Setup and Configuration for Group Salary Increases	130
Common Elements Used in This Section	131
Pages Used to Budget Group Increases	132

Setting Up a Budget Description	133
Defining Budget Requests	134
Entering and Calculating Budget Components	138
Viewing Budget Details	142
Viewing Budget Comparisons	143
Pages Used to View Budget Comparisons	143
Viewing Proposed Budgets	144
Viewing Budget Variances	145
Approving a Budget	145
Planning Group Salary Increases	146
Understanding Salary Increase Planning	146
Pages Used to Plan Group Salary Increases	147
Calculating Group Increases	148
Applying Group Increases	148
Viewing the Salary Plan Summary	155
Viewing Budget Information	156
Loading Salary Changes to Compensation Records	158
Understanding Loading Salary Changes to Compensation Records	158
Prerequisites	158
Pages Used to Refresh Anniversary Dates	158
Creating and Refreshing Anniversary Dates	159
Running Salary Changes	159
(MEX) Defining the Increase Matrix Method	160

Chapter 8

Defining, Assigning, and Approving Merit Increases	163
Defining Merit Increase IDs and Groups	163
Pages Used to Define Merit Increase IDs and Groups	163
Defining Merit Increase IDs	164
Defining Review Results Resolution	165
Defining Merit Groups	168
Assigning, Approving, and Loading Merit Increases	168
Pages Used to Assign and Approve Merit Increases	169
Assigning and Approving Merit Increases	169
Reviewing Merit Increase Details	171
Loading Merit Increases	173
Reporting Merit Increases	174

Chapter 9

Processing Mass Salary Increases	175
---	------------

Updating Salaries by Salary Plan or Pay Group	175
Understanding Salary Updating	175
Page Used to Run the Sal Plan/Paygroup Process	176
Updating the Job Compensation Rate	176
Updating Salaries by Job Code	178
Understanding the Update by Job Code Process	178
Page Used to Update by Job Code	178
Reclassifying a Job Code	178
(USF) Administering Mass Pay Adjustments	180
Understanding Mass Pay Adjustments	180
Defining Mass Pay Adjustment Parameters	181
Pages Used to Define Mass Pay Adjustments	181
Defining a Mass Pay Type	182
Defining a Mass Pay Plan	183
Defining Mass Pay Adjustments	184
Generating a Mass Pay Adjustment Report	185
Loading Salary Information into Tables	186
Entering Designated Agent Information	187

Chapter 10

(JPN) Updating Salaries for Japan	189
Understanding Updating Salaries for Japan	189
Common Elements Used in This Section	190
Updating Salaries by Step Increase	190
Understanding the Step Increase Process	190
Pages Used to Update Salaries by Step Increase	191
Setting Up Step Increases	191
Processing Step Increases	192
Updating Salaries by Salary Amount Increase	193
Understanding the Salary Amount Increase Process	193
Pages Used to Update Salaries by Salary Amount Increase	193
Setting Up Salary Amount Increases	194
Processing Salary Amount Increases	194
Updating Salaries by Percentage	196
Understanding the Update Salaries by Percentage Process	196
Pages Used to Update Salaries by Percentage	197
Defining Salary Increase IDs	198
Processing Salary Increases	199
Running a Salary Increase Simulation	200
Running the Salary Simulation Report	203
Loading Salary Increases	203

Chapter 11

(FRA) Forecasting Salaries for France	205
Understanding Salary Forecasting	205
Setting Up Salary Forecasting	206
Understanding Technical Details	206
Technical Details: Compensation Effects	207
Technical Details: Categorization of Events	208
Common Elements Used in This Chapter	210
Defining Periods	211
Pages Used to Define Periods	212
Associating Contiguous Working Periods	212
Setting Up Events	213
Pages Used to Set Up Events	214
Simulating Headcount Increase	216
Simulating Future Awards	218
Simulating a Compensation Increase Event	219
Simulating a Headcount Decrease	221
Simulating a Promotion	221
Simulating Seniority	222
Defining a Working Schedule	223
Defining Proration Rules	223
Defining Hours Rates	224
Defining Scenarios	225
Pages Used to Define Scenarios	226
Associating Events with a Scenario	226
Assessing the Structure Effect	228
Forecasting Compensation	228
Understanding Compensation Forecasting,	229
Pages Used to Forecast Compensation	229
Forecasting Compensation	230
Running a Compensation Simulation	230
Running the Scenario Comparison Report	231
Purging Scenario History	232
Page Used to Purge Scenario History	232
Deleting Scenario Results	232
Viewing Scenario History	233
Pages Used to View Scenario History	233

Chapter 12

Viewing and Reporting Summary Salary Data	235
Viewing Compensation History	235
Understanding Compensation History	235
Pages Used to View Compensation History	235
Viewing a Compensation Summary	236
Running Compensation Change Reports	237
Pages Used to Run Compensation Change Reports	238
Viewing Worker Ranking	239
Understanding Worker Ranking	239
Pages Used to View Worker Ranking	239
Viewing Worker Ranking in Terms of Compensation	240
Viewing the Details of Worker Compensation Packages	241
Viewing Workers' Compensation Rank With Privacy Protected	243
Viewing Job Evaluations	244
Understanding Job Evaluations	245
Pages Used to View Job Evaluations by Grade	245
(GBL) (USF) Comparing Job Evaluation Criteria	245

Appendix A

Predefined Source IDs and Result IDs for Configurable Matrices	247
Predefined Source IDs	247
Predefined Result IDs	249

Index	253
--------------------	------------

PeopleSoft Human Resources Manage Base Compensation and Budgeting Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft application fundamentals.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Manage Base Compensation and Budgeting.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting* provides you with implementation and processing information for your PeopleSoft Human Resources Base Compensation and Budgeting system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications across the PeopleSoft HRMS product line. No matter which PeopleSoft Enterprise HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Common Elements Used in This PeopleBook

Salary Administration Plan	A plan of salary defaults, grades, and step components.
Salary Increase Plan	A plan for increasing the salaries of individual workers in a group. This plan is based on a group salary increase budget.
Salary Plan	<p>When used without further qualification, this term generally refers to a salary administration plan.</p> <p>In the "Budgeting and Planning Salary Increases" chapter of this documentation, <i>salary increase plans</i> are sometimes referred to as <i>salary plans</i>.</p>

Chapter 1

Getting Started With Base Compensation and Budgeting

This chapter provides these overviews:

- Base Compensation and Budgeting business processes.
- Base Compensation and Budgeting implementation.

Base Compensation and Budgeting Business Processes

PeopleSoft Enterprise Base Compensation and Budgeting uses these business processes:

- Salary administration plans.
- Salary increases (budgeting and planning).
- (FRA) Salary forecasts for France.
- (JPN) Salary updates for Japan.
- Mass salary increases.
- Worker performance (history reviews).
- Merit increases (assignment and approval).
- Plan salary data (viewing and reporting).

We cover these business processes in the business process chapters of this PeopleBook.

Base Compensation and Budgeting Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Base Compensation also provides component interfaces to help you load data from your existing system into Base Compensation tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the components and their setup component interfaces:

Component	Component Interface	References
COMP_RATECD_TBL	CI_COMP_RATECD_TBL	See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation</i> , "Setting Up Administer Compensation," Setting Up Rate Codes.
JOB_CODE_TBL	CI_JOB_CODE_TBL	See <i>PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Jobs," Defining Job Subfunction and Job Function Codes.
LOCATION_TABLE	LOCATION_TABLE	See <i>PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Organization Foundation Tables," Establishing Locations.
SALARY_GRADE_TBL	SALARY_GRADE_TBL	See Chapter 3, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps, page 16.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including installation guides, data models, business process maps, and troubleshooting guidelines.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Understanding Base Compensation and Budgeting

This chapter discusses:

- Base Compensation and Budgeting.
- Base Compensation and Budgeting business processes.
- Base Compensation and Budgeting integrations.
- Base Compensation and Budgeting program design.
- (FRA) Salary forecasting process design.
- Salary plan administration.

Base Compensation and Budgeting

Base Compensation and Budgeting enables you to calculate budgets, set up your basic salary planning system architecture, and manually apply salary data to worker records.

Prerequisites

Before you begin planning worker salaries, make sure control table data and worker job data exists in PeopleSoft Enterprise Human Resources tables.

The following are some optional setup steps to consider:

- Enable workflow on the PeopleTools Workflow System Defaults page.

Workflow is available in the worker review and salary increase budgeting and planning business processes.
- Select Rate Code Groups on the Installation Table - HRMS Options page if your organization applies Percent-type rate codes to groups of pay components.
- Select Salary Points on the Installation Table - HRMS Options page if your organization uses Points-type rate codes.
- Select Multi-Step Grade on the Installation Table - HRMS Options page if you want the system to automatically enter step components in Job Data.

- (Optional) Create configurable matrices if you want to use a salary increase matrix to calculate a budget.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS," Creating Role Users Using a Message Agent

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

[Chapter 5, "Using Configurable Matrices," page 59](#)

Base Compensation and Budgeting Business Processes

Base Compensation and Budgeting supports these business processes.

Salary Administration Plans

Using the Base Compensation and Budgeting business process, you can create salary administration plans to assign default compensation packages to workers at the location, job code, or worker level. Use these salary plans to move workers through step increases manually or automatically.

To set up and administer salary administration plans:

1. Set up salary plans, grades, and steps.
2. Tie the salary plans, grades, and steps to locations or job codes for defaulting into positions and worker compensation packages.
3. (Optional) Enter salary raises using the Automated Step Increase process.
4. View salary structures and generate reports.

Base Compensation Budgets and Plans

You can create base compensation budgets for groups of workers by defining increases for pay components. The system calculates the increase for all workers in the group who have the component in their compensation package. You can define budget increases by effective date, effective sequence, action, and action reason and compare multiple proposed budgets for a given group and budget period.

Create your salary increase plan by applying the budgeted increases to workers in the group. Manually adjust individual worker's raises based on compensation history and review results. Check the variance between the budget totals and the salary plan totals, approve the raises when you're satisfied, and load them to the workers' Job Data records where they take effect on the effective date of the budget or the worker's anniversary date, depending upon how you defined the budget.

To budget and plan salary increases:

1. Create a salary increase group.

2. Set up defaults and controls for salary increase budgets and plans.
3. Create requested budgets, compare budgets, and optionally approve a budget.
4. Create a salary increase plan by applying budgeted increases to worker compensation and manually adjusting individual increases.
5. Approve the salary increase budget and plan.
6. Populate worker records with the approved increases.

Note. Information from the worker's salary administration plan, such as compa-ratio, job ratio and position in grade, is available for your review while adjusting salary increases for workers in the group. Similarly, each worker's current review result is also available to help you adjust individual raises.

See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," page 9

Chapter 7, "Budgeting and Planning Salary Increases," page 127

Mass Salary Increase Processes to Update Salaries

In the Base Compensation and Budgeting Process menu, you'll find the following two processes to implement salary mass updates:

- Update by Salary Plan and Pay Group.
- Update by Job Code.

In addition to these processes, you can use PeopleTools mass change functionality and templates to update salary data.

Summary Data and Reports

Base Compensation and Budgeting inquiry pages and reports provide the following types of summary information:

- Salary plan and grade structures.
- Worker compensation history and summaries by worker, group, company, and department.
- Worker review summaries and distribution analysis.

Base Compensation and Budgeting Integrations

Human Resources integrate with other PeopleSoft Enterprise applications and with third-party applications.

Tables shared by Human Resources are available to many HRMS applications. In addition, data in many of these tables is available to any PeopleSoft application that is set up to subscribe to the published messages. Base Compensation and Budgeting integrates with PeopleSoft Enterprise Payroll for North America.

We cover integration considerations in this PeopleBook.

Base Compensation and Budgeting Program Design

The core of Base Compensation and Budgeting comprises four main phases of operation:

1. Set up various supporting tables and salary grades and steps.
2. Create salary plans.
3. (Optional) Associate salary plans with job codes.
4. Assign workers to salary plans.

Once your Base Compensation and Budgeting setup is complete, you can apply increases either manually or through mass processing and view salary information for individuals or groups.

(FRA) Salary Forecasting Process Design

For organizations in France, Base Compensation and Budgeting functionality allows for additional salary forecasting capabilities by defining the following parameters:

- Compensation periods.
- Headcount increase and decrease events.
- Simulation parameters.
- Groups incentives and awards.
- Compensation increase events.
- Group promotions simulations.
- Seniority events.
- Calculation work weeks.
- Proration rules.
- Overtime rates.
- Scenarios and groups.

Salary Plan Administration

After completing the salary plan setup process, you associate salary plans to worker job records on the Job Data - Salary Plan page. The system must contain worker job data before you can apply salary plans to worker job records.

Chapter 3

Setting Up Base Compensation and Budgeting

This chapter discusses how to:

- Define salary increase guidelines using a configurable matrix.
- Set up salary plans, grades, and steps.
- Run salary grades and salary steps reports.
- Set up base compensation budgeting and planning.

Defining Salary Increase Guidelines Using a Configurable Matrix

To define salary increase guidelines using a configurable matrix, use the Define Sources (WCS_SOURCE_DEFN), Define Results (WCS_RESULT_DEFN), and Define Matrices (WCS_LK_TBL_DEFN) components..

This section discusses how to:

- Define a salary increase matrix using a configurable matrix.
- Define inputs for salary increase matrices.
- Define outputs for the salary increase matrices.
- Define search keys.
- Define data content for the salary increase matrices.
- View matrix results.

Pages Used to Define Salary Increase Guidelines Using a Configurable Matrix

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Matrix Definition	WCS_LK_TBL_DEFN	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition	Define and maintain matrices.

Page Name	Definition Name	Navigation	Usage
Inputs	WCS_LK_TBL_INPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs	Define inputs for salary increase matrices.
Outputs	WCS_LK_TBL_OUTPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs	Define outputs for salary increase matrices.
Search Keys	WCS_LK_TBL_KEYS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys	Specify the search keys to be used to match worker data used in salary increase matrices.
Load Configurable Matrix Keys	WCS_LK_TBL_KEY_SEC	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys Click Select Values from Prompt Tbl on the Search Keys page.	Automatically load search keys for specific sources using a prompt table.
Data Content	WCS_LK_TBL_DATA	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content	Enter values for the output data.
View	WCS_LK_TBL_VIEW	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View	View the matrix as of the last saved version.

Defining a Salary Increase Matrix Using a Configurable Matrix

Access the Matrix Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition).

Matrix Definition		Inputs	Outputs	Search Keys	Data Content	View
Matrix Name: KUS001						
Matrix Definition First 1 of 1 Last						
*Effective Date:	01/01/2000	*Status:	Active			
*Description:	Pos In Range Salary Increase					
Short Description:	POSINRNG					
*Matrix Type:	SALMATRIX Salary Increase Matrix					
Matrix Environment						
Matrix Usage (Results):		SALMATRIX Salary Increase Matrix				
Matrix Orientations (Sources)						
Orientation	Description					
EMPLOYEE	Employee					-
Comment:						
Last Updated: 07/15/04 7:17:02.000000PM Last Updated By: PS						

Matrix Definition page

Status Select *Active*. The default value for all configurable matrices is *Inactive*. You must change the status to *Active* to use the matrix.

Effective Date Enter a date that is equal to or less than the budget period start date to be linked to the matrix.

Matrix Type Select *SALMATRIX*.

Defining Inputs for Salary Increase Matrices

Access the Inputs page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs).

Matrix Definition Inputs Outputs Search Keys Data Content View

Matrix Name: KUS001

Matrix Definition First 1 of 1 Last

Effective Date: 01/01/2000 **Status:** Active

Description: Pos In Range Salary Increase

Matrix Type: Salary Increase Matrix

Matrix Inputs First 1-2 of 2 Last

*Order: 10 *Label: Perf Rating + -

*Key Type: Match Type of Data: Char

Decimals: 0 *Display As: Row

Optional Prompting

Sources for Resolving Input Customize First 1 of 1 Last

*Source ID	Description	Orientation		
PERFRATING	Perf Rating	EMPLOYEE	+	-

*Order: 20 *Label: Pos in Range + -

*Key Type: Range Type of Data: Number

Decimals: 2 *Display As: Column

Range Rules

*Range Lookup Method: Use Higher Limit

When Outside Range

- ☒ Use First Limit if Under
- ☒ Use Last Limit if Over
- ☐ Interpolate Result IDs

Optional Prompting

Sources for Resolving Input Customize First 1 of 1 Last

*Source ID	Description	Orientation		
PERCENT-IN-RANGE	Percent in Range	EMPLOYEE	+	-

Inputs page

Source ID

Select the source for the salary increase matrix. The maximum number of inputs for each matrix is 15. Common types of inputs include performance rating, position in range, or compa-ratio.

Defining Outputs for Salary Increase Matrices

Access the Outputs page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs).

Matrix DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:KUS001

Matrix Definition

First1 of 1Last

Effective Date:01/01/2000Status:Active

Description:Pos In Range Salary Increase

Matrix Type:Salary Increase Matrix

Matrix Outputs

First1-3 of 3Last

*Order:10

*Label:Min Percent

Decimals:2

☐ Do not return Results

Valid Values

*Result ID:MINIMUM_PERCENTAGE

Type of Data:Number

*Order:20

*Label:Default Percent

Decimals:2

☐ Do not return Results

Valid Values

*Result ID:DEFAULT_PERCENTAGE

Type of Data:Number

*Order:30

*Label:Max Percentage

Decimals:2

☐ Do not return Results

Valid Values

*Result ID:MAXIMUM_PERCENTAGE

Type of Data:Number

Outputs page

Result ID

Select an output for the salary increase matrix. Typical outputs include minimum, default, and maximum percentages. You can have a maximum of 30 outputs for each matrix.

These system-delivered values have default names; you can edit the labels to suit your business needs.

See [Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices,"](#) page 247.

Defining Search Keys

Access the Search Keys page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys).

The screenshot displays the 'Search Keys' tab within the 'Matrix Definition' section for matrix KUS001. The matrix is active and has an effective date of 01/01/2000. The description is 'Pos In Range Salary Increase'. The search keys are defined for the 'Pos in Range' series with values 40.00, 60.00, 80.00, and 100.00. A 'Generate Key Combinations' button is located at the bottom of the search key table.

Matrix Definition		First	1 of 1	Last
Matrix Name:	KUS001			
Effective Date:	01/01/2000	Status:	Active	
Description:	Pos In Range Salary Increase			
Matrix Type:	Salary Increase Matrix			
*Enter Keys for:	Pos in Range	Select Values From Prompt Table		
Search Key Series		Customize	Find	View All
Search Key (Number)		First	1-4 of 4	Last
	40.00	+	-	
	60.00	+	-	
	80.00	+	-	
	100.00	+	-	
Generate Key Combinations				

Search Keys page

Use this page to enter the key values against which worker data will be matched. Suitable search keys for salary increase guidelines are *Percent in Range* and *Compa-Ratio*.

Note. You can create a configurable matrix without specifying any search keys and output data values. For example, you may want to define a template for a matrix and then load values from other sources, such as a flat file. However, if you change the status of the matrix to *Active* and you have not defined any search criteria or values, you will receive a warning.

Defining Data Content for Salary Increase Matrices

Access the Data Content page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content).

Matrix Definition

Inputs

Outputs

Search Keys

Data Content

View

Matrix Name: KUS001

Matrix Definition

First 1 of 1 Last

Effective Date: 01/01/2000 **Status:** Active
Description: Pos In Range Salary Increase
Matrix Type: Salary Increase Matrix

Matrix Data

Customize | Find | View All | 1-16 of 16 | First Last

Perf Rating	Pos in Range	Default	Min Percent	Default Percent	Max Percentage		
1	40.00	<input type="checkbox"/>	6.00	6.50	7.00	+	-
1	60.00	<input type="checkbox"/>	5.00	6.00	7.00	+	-
1	80.00	<input type="checkbox"/>	4.00	5.00	6.00	+	-
1	100.00	<input type="checkbox"/>	3.00	4.00	5.00	+	-
2	40.00	<input type="checkbox"/>	5.00	5.50	6.00	+	-
2	60.00	<input type="checkbox"/>	4.00	5.00	6.00	+	-
2	80.00	<input type="checkbox"/>	3.00	4.00	5.00	+	-
2	100.00	<input type="checkbox"/>	2.00	3.00	4.00	+	-
3	40.00	<input checked="" type="checkbox"/>	4.00	5.00	5.00	+	-
3	60.00	<input type="checkbox"/>	3.00	4.00	5.00	+	-
3	80.00	<input type="checkbox"/>	2.00	3.00	4.00	+	-
3	100.00	<input type="checkbox"/>	1.00	2.00	3.00	+	-
4	40.00	<input type="checkbox"/>	0.00	0.00	1.00	+	-
4	60.00	<input type="checkbox"/>	0.00	0.00	0.00	+	-
4	80.00	<input type="checkbox"/>	0.00	0.00	0.00	+	-

Data Content page

Use this page to view input and output fields. You will enter the data values according to your salary guidelines. The columns that appear on this page vary depending on the fields you define on the Inputs page and Outputs page. The columns to the left of the Default check box are defined on the Inputs page. The columns to the right of the Default check box are defined on the Outputs page.

Viewing Matrix Results

Access the View page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View).

The screenshot shows a web interface for viewing a matrix definition. At the top, there are tabs: Matrix Definition, Inputs, Outputs, Search Keys, Data Content, and View. The 'View' tab is selected. Below the tabs, the 'Matrix Name' is KUS001. A sub-header 'Matrix Definition' is followed by 'First', '1 of 1', and 'Last'. The main content area displays the following information:

- Effective Date:** 01/01/2000
- Status:** Active
- Description:** Pos In Range Salary Increase
- Matrix Type:** Salary Increase Matrix

Below this information is a button labeled 'Display Saved Matrix' and a note in parentheses: '(This will display only the last saved version of the matrix)'. The rest of the page is empty.

View page

After you have entered all data content for outputs, you must save the salary increase matrix. You can view the matrix on this page only *after* you have saved it.

When you click the Display Saved Matrix button, the results generated are from the last saved version of the matrix.

Important! This page will display only the last saved version of the matrix.

Setting Up Salary Plans, Grades, and Steps

To set up salary plans, grades, and steps, use the Define Salary Increase Matrix (SALARY_MATRIX_TBL), Define Salary Plan (SALARY_PLAN_TABLE), and Define Salary Grades (SALARY_GRADE_TBL) components. Use the SALARY_GRADE_TBL and CI_COMP_RATECD_TBL component interfaces to load the data into the tables for these component interfaces..

This section provides an overview of salary plan setup and discusses how to:

- Define a salary increase matrix.

- Define salary plan characteristics.
- Set up salary grades.
- Associate salary grades with labor agreements.
- Associate salary components with salary steps.
- Set grade advance criteria.
- (USF) Establish salary steps within a salary grade.

Understanding Salary Plan Setup

Before you can use the Base Compensation and Budgeting business process, you need to set up the control tables that support it. You define your salary plans, grades, and steps in a series of control tables. At each level, you define parameters, such as review rating scale and currency, that the system enters as default information at the next level.

Based on how your organization defines its salary structures, complete the following steps to set up your salary plans:

1. (Optional) Set up salary increase matrix guidelines on the Define Salary Increase Matrix Table page.

Set up this table if you use matrix guidelines in your organization to plan salary increases.

Note. The Salary Increase Matrix Table JPN page is identical to the Define Salary Increase Matrix Table page, but it is specific to Japanese users.

2. (Optional) Create a configurable matrix to calculate the budget.

See [Chapter 5, "Using Configurable Matrices," page 59](#).

3. Define each salary plan with a unique ID on the Define Salary Plan page.

German users enter tariff information for the salary plan.

4. Assign a series of salary grades to the salary plan on the Salary Grade Table page.

5. (Optional) Set up labor agreement categorization defaults on the Categorization Defaults page.

6. (Optional) For each salary grade, set up salary steps with pay components, and their compensation values and currency, on the Salary Step Components page.

The system uses salary structures to establish default compensation packages. For that reason, you can reach these same salary plan setup pages through the Workforce Administration menu.

See Also

[Chapter 10, "\(JPN\) Updating Salaries for Japan," page 189](#)

Pages Used to Set Up Salary Plans, Grades, and Steps

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Salary Increase Matrix	SALARY_MATRIX_TBL	Compensation, Base Compensation, Maintain Plans, Define Salary Increase Matrix, Define Salary Increase Matrix	Establish the minimum and maximum percentage increases permitted for each review rating by quartile.
Define Salary Plan	SALARY_PLAN_TABLE	Compensation, Base Compensation, Maintain Plans, Define Salary Plan, Define Salary Plan	Define the common characteristics of your salary plan. German users can use this page to associate a German tariff and tariff area with the salary plan.
Salary Grade Table	SALARY_GRADE_TBL1	<ul style="list-style-type: none"> Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Salary Grade Table Compensation, Base Compensation, Maintain Plans, Define Salary Grades USF, Salary Grade Table 	Specify the minimum, maximum, and midpoint rates for salary grades. Set up several salary grades, in ascending or descending order, within the same salary administration plan. To create different ranges for the same salary grade, use a separate salary administration plan for each.
Categorization Defaults	SALARY_GRADE2_TBL	Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Categorization Defaults	Associate the salary grade with labor agreement categories and subcategories. Before using this page, define labor agreements, categories, and subcategories on the Employee Categorization page.
Salary Step Components	SALARY_GRADE_T3GBL	Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Salary Step Components	Associate salary components with salary steps within a salary grade. The information that you set up here is used as default compensation data when your workers move into a specific step.
Rate Code	WCS_RTCD_DETAILS	Click Details on the Salary Step Components page.	View details of the rate code as defined in the Comp Rate Code table.

Page Name	Definition Name	Navigation	Usage
Grade Advance Criteria	SAL_GRD_REV_JPN	Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Grade Advance Criteria	Specify grade advance criteria used in the <i>Shohkaku</i> (Grade Advance) candidate process.
Salary Structure Summary	SALARY_STRUCTURE	Compensation, Base Compensation, Review Salary Information, Salary Structure Summary	View a summary of the salary structure online or print reports that summarize your grade structure or grade and step structure for each plan. This information is helpful when you plan salary increases.
(USF) Salary Step Table	GVT_SAL_GRADE_TBL2	Compensation, Base Compensation, Maintain Plans, Define Salary Grades USF, Salary Step Table	Associate salary components with salary steps within a salary grade. The information you set up here is used as default compensation data when your workers move into a specific step.

See Also

Chapter 10, "(JPN) Updating Salaries for Japan," Pages Used to Update Salaries by Percentage, page 197

Defining a Salary Increase Matrix

Access the Define Salary Increase Matrix page (Compensation, Base Compensation, Maintain Plans, Define Salary Increase Matrix, Define Salary Increase Matrix).

Define Salary Increase Matrix

Set ID: SHARE Salary Matrix Code: KCEX

Rating Scale Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1994 *Status: Active

*Description: Exempt Salary Ranges Short Description: Exempt

Rating Model: KC01 Canadian Rating Model

Salary Increase Matrix Find | View All | First 1-4 of 5 Last

*Review Rating		Below Min		1st Quartile		2nd Quartile		3rd Quartile		4th Quartile		
		Min%	Max %	Min%	Max %	Min%	Max %	Min%	Max %	Min%	Max %	
1	Exceeds	8.0	15.0	9.0	13.0	7.0	10.0	5.0	8.0	3.0	6.0	+ -
2	Expected	6.0	12.0	7.0	10.0	5.0	8.0	3.0	6.0	1.0	5.0	+ -
3	Imprv Req	5.0	9.0	4.0	7.0	3.0	5.0	2.0	4.0	0.0	3.0	+ -
4	Not Met	0.0	3.0	0.0	2.5	0.0	2.0	0.0	1.0	0.0	0.0	+ -

Define Salary Increase Matrix page

Rating Scale

Rating Model

Select a rating model to associate with the matrix. Rating models are defined on the Rating Model page.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog."

Salary Increase Matrix

Review Rating

Select from the list of ratings in the rating model associated with the rating scale that you selected.

Below Min (below minimum)

Enter the percentage increase of a worker's existing salary. The below minimum range is for those workers whose salaries are below the amount for the first quartile.

Note. This column is optional because some organizations do not permit salaries that are below the minimum.

1st Quartile to 4th Quartile

For each quartile, enter the percentage increase of a worker's existing salary.

Note. If you use a structure other than quartiles as the basis for establishing salary matrices in your organization, you can modify this page to accommodate your requirements. To do this, ask your human resources project leader or refer to the PeopleTools documentation.

Defining Salary Plan Characteristics

Access the Define Salary Plan page (Compensation, Base Compensation, Maintain Plans, Define Salary Plan, Define Salary Plan).

Define Salary Plan

Set ID: SHARE **Salary Administration Plan:** KUH1 [Business Units that use this Set ID](#)

Salary Plan Find First 1 of 1 Last

***Effective Date:** 01/01/1980 ***Status:** Active [Go To Row](#)

***Description:** Professional Workers

Short Description: Profession ☒ **Wage Progression Plan** [Define Wage Progression Rule](#)

***Standard Hours:** 40.00 **Work Period:** W Weekly

***Currency Code:** USD US Dollar

Default Salary Matrix Code:

Default Rating Model:

Company: GBI Global Business Institute 9999

Frequency Defaults

Hourly: H Hourly

Daily: D Daily

Monthly: M Monthly

Auto Calculated Premium

☐ **Auto Calculated Premium**

Absorbing Premium:

Non-Absorbing Premium:

Define Salary Plan page (1 of 2)

Attached File

URL Identifier: [Add](#)

Long Description:

Added By:

Date Added:

Germany

Tariff:

Tariff Area:

Japan

Salary Plan Explanation:

Define Salary Plan page (2 of 2)

Salary Plan

Standard Hours	Enter the standard hours for this salary plan. The system uses this value (and the value in Work Period) in frequency conversions for compensation rate codes that are defined with hourly frequency.
Wage Progression Plan	<p>Select this check box if you want to associate a wage progression plan to this salary administration plan.</p> <p><i>See PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Using Wage Progression with Administer Compensation."</i></p>
Work Period	Enter the work period in which the standard hours should be completed.
Default Salary Matrix Code	<p>If you use salary increase guidelines matrices to plan salary increases, select a code. The system enters this matrix code as the default for each grade in the salary plan.</p> <p>You establish salary matrix codes in the Salary Increase Matrix table. If you have not defined a salary matrix, you can enter this information later.</p>
Default Rating Model	Once you select a default salary matrix code, the system populates the Default Rating Model if you have linked it to the salary matrix code on the Salary Matrix Table. You cannot change it here if it is linked to the salary matrix code unless the system has been installed for Japan.
Company	Select to associate this plan with a particular company in your organization. This value is used in Salary Grade Tables to calculate the compensation rate for rate code type points (Salary Step Components). The Points value is defined by company. You create valid codes on the Comp Rate Code Table page.

Frequency Defaults

Hourly, Daily, and Monthly	Select a Frequency ID for each field. The system uses the annualization factor of that Frequency ID when it calculates the daily, monthly, or annual rate for each component of pay that you assign to a salary step on the Salary Step Components page. The system stores the valid values in the Frequency table.
-----------------------------------	---

Auto Calculated Premium

Auto Calculated Premium	Select if workers assigned to this salary plan are eligible for a salary premium above the amount calculated by the default component.
--------------------------------	--

Absorbing Premium and Non-Absorbing Premium Select an absorbing premium rate code if the salary premium should absorb an increase in the default salary amount from the component. For example, if a worker has an absorbing premium of 10,000 USD and their default salary increases by 2,000 USD, then the premium would reduce to 8,000 USD. Only rate codes that have the Default Without Override option selected are available as options for the absorbing rate code.

Select a non-absorbing premium rate code if the salary premium should remain unchanged by an increase in the default salary amount.

You can select one or both kinds of rate codes. You can determine how much of the premium each rate code will absorb for each worker on the Job Data - Compensation page.

Attached File

URL Identifier Enter the URL identifier of the salary planning document you want to attach to this salary plan.

File Name Displays the file name.

Add Click to add the file to this salary plan.

Added By and Date Added Displays who added the file and on what date it was added.

(DEU) Germany

Tariff and Tariff Area Enter the tariff that is associated with this salary plan and then enter the tariff's area.

(USF) US Federal

Next Scheduled Pay Adjustment Select the date for the next scheduled adjustment.

(JPN) Japan

Salary Plan Explanation When you use salary plans to represent your job categories, use this field to enter explanatory information about the salary plan (which may represent the job category) that is additional to its description. This information enables you to add job category-related information when you use different salary plans for different job categories. You might, for example, enter information about the job types that make up this job category.

Setting Up Salary Grades

Access the Salary Grade Table page (Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Salary Grade Table).

Salary Grade Table | Categorization Defaults | Salary Step Components | Grade Advance Criteria

Set ID: SHARE Salary Administration Plan: KUH2 Administrative Workers

Salary Grade: 4 Standard Hours: 40.00 Salary Basis: Annl Basis

& Salary Grade Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: WP Plan KUH2 Grade 4 Short Description: WP Plan KU

Additional Description:

Salary Matrix Code:

Rating Model:

Currency Code: USD Dollar Range Spread: 100.0 %

	Minimum	Midpoint	Maximum
Annual	46,800.00	70,200.00	93,600.00
Monthly	3,900.00	5,850.00	7,800.00
Daily:	180.00	270.00	360.00
Hourly	22.50	33.75	45.00

Japan

Salary Grade Explanation:

Salary Grade Table page

Before using this page, set up a salary administration plan on the Define Salary Plan page.

Salary Grade

Additional Description Enter information that will supplement the salary grade (ID) and description. For example, you might use the field to store an additional internal name for the grade, such as "Associate Managers" to supplement a simple description such as "Grade 4."

Salary Matrix Code If you selected a default salary matrix code on the Define Salary Plan page, the system enters that code as the default. You can override the default.

Rating Model	If you selected a default salary matrix code on the Salary Plan Table setup page, the system displays the Rating Model that is tied to the salary matrix.
Currency Code	Displays the currency code that you selected for the Salary Administration Plan on the Salary Plan Table setup page. You can change the currency code.
Range Spread	The system calculates the range spread percentage by dividing the salary maximum amount by the minimum amount and then subtracting 1.0.

Salary Ranges

Minimum and Maximum	Enter the minimum and maximum salary in either the Annual, Monthly, Daily, or Hourly field row. Enter the range in one frequency; the system calculates the minimum and maximum in the other frequencies. (USF) Bi-Weekly is also a frequency option.
Midpoint	The system calculates the midpoint as the maximum plus the minimum divided by 2. You can override this default.
Annual, Monthly, Daily, Hourly, and Bi-Weekly	Enter the annual, monthly, daily, hourly, or bi-weekly salary range, depending on how you quote the salary for this grade. If you leave the rows blank, the system calculates the values.

(JPN) Japan

Salary Grade Explanation	Use this field to store information such as capability grade requirements and the corresponding supervisor level.
---------------------------------	---

Associating Salary Grades With Labor Agreements

Access the Categorization Defaults page (Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Categorization Defaults).

Salary Grade Table		Categorization Defaults		Salary Step Components		Grade Advance Criteria	
Set ID:	SHARE	Salary Administration Plan:	KUH2 Administrative Workers				
Salary Grade:	4	Standard Hours:	40.00	Salary Basis:	Annl Basis		
Labor Information							
Find View All First 1 of 1 Last							
Effective Date:	01/01/1980	Status:	Active				
Description:	WP Plan KUH2 Grade 4						
Regulatory Region:	<input type="text"/>						
Labor Agreement:	<input type="text"/>						
Employee Category:	<input type="text"/>						
Subcategory:	<input type="text"/>						
Subcategory 2:	<input type="text"/>						

Categorization Defaults page

If the salary administration plan has a related wage progression rule, this page will not be available.

Regulatory Region Select a regulatory region from the valid values that you set up on the Regulatory Region page.

Labor Agreement Select a labor agreement from the valid values that you set up on the Employee Categorization page.

Employee Category, Subcategory, and Subcategory 2 Select, as necessary, from the available options.

Associating Salary Components With Salary Steps

Access the Salary Step Components page (Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Salary Step Components).

Salary Step Components page

Salary Step Components page

Salary Grade

Increment Type

If you plan to run a process that automatically moves a worker to the next salary step, select from these values:

- *(None)*: Select to use no increments or to deselect any values that were entered in error.
- *Date Based*: Select to move the worker into the next step based on the worker's entry date into this step. If you select this option, the Months to Next Step Increment field becomes visible.
- *Either*: Select to use Date Based and Hrs Based at the same time. If you select this option, the Spec Accum (special accumulator), Months to Next Step Increment, and Hours to Next Step Increment fields become visible.
- *Hrs Based* (hours based): Select for the worker's step increase to be based on a number of hours. If you select this option, the Spec Accum and Hours to Next Step Increment fields become visible.
- *Manual*: Select to manually enter increments.
- *Wks Based* (weeks based): This value is for U.S. federal government users only.

Spec Accum (special accumulator)

If you selected an Increment Type of *Either* or *Hrs Based*, select a special accumulator. The system uses this accumulator to determine worker compensation.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits*, "Setting Up Base Benefits Core Tables," Setting Up Special Accumulators.

Generate Steps or Regenerate Steps	Click this button to calculate or recalculate the salary steps after you have changed the wage progression rules.
Wage Progression Rule	Click this link to access the Salary Plan Table2 page, where you can view wage progression rules associated with this salary grade.

Salary Step

Step	If you are defining a new step or modifying a step, enter the step number.
Currency	<p>Select a currency code for the step. The system enters the currency code that you entered in the Salary Grade table as the default value. You can change the currency code.</p> <p>The system displays the compensation totals for the step on this page in the currency that you specify here.</p>
Months to Next Step Increment	If you select an Increment Type of <i>Date Based</i> or <i>Either</i> , enter the number of months that the worker must remain in this step before being eligible for the next step increment.
Hours to Next Step Increment	If you select an Increment Type of <i>Either</i> or <i>Hrs Based</i> , enter the number of hours that the worker must accumulate in this step before being eligible for the next step increment.

Salary Components

Rate Code	<p>Select a rate code that you want to associate with this salary step. The valid values in the list are the base pay components that you defined on the Comp Rate Code table page.</p> <p>The system automatically populates certain fields in the grid based on how you defined the rate code in the Compensation Rate Code table.</p>
Seq (sequence)	<p>The system displays 0 as the default Seq number. To avoid duplicate keys for data rows, enter 1 or higher if you associate the same rate code with the same step more than once.</p> <p>Use the same rate code more than once to give the same rate code different compensation rates for the same step. This is useful for job splitting.</p>
Details	Click this button to view details of the selected rate code and rate matrix, if applicable.

Comp Rate (compensation rate)	<p>The system displays the default compensation rate that you defined for the rate code on the Comp Rate Code Table page. If the rate code type is <i>Flat Amount</i>, <i>Hourly Rate</i>, or <i>Hourly Rate + Flat Amount</i>, enter a compensation rate for the rate code in this salary step.</p> <hr/> <p>Note. This field is unavailable if you are using a rate code that has an associated rate matrix.</p> <hr/>
Currency	The system enters the default currency code that you defined for the rate code on the Comp Rate Code Table page. You can change the rate code's currency code for this salary step.
Frequency	The system enters the default Frequency ID that you defined for the rate code on the Comp Rate Code Table page. You can override that frequency here.
Percent	If the rate code type for this rate code is <i>Percent</i> , enter a percent for the rate code in this salary step.
Rate Code Group	<p>If you selected the Use Rate Code Groups check box on the Installation Table - HRMS Options page, you can apply the rate code percent to a rate code group. To do so, select a rate code group from the list of valid values. You define rate code groups on the Rate Code Groups page.</p> <p>This field is hidden if you did not select Rate Code Groups in the Installation table.</p>
Points	<p>If the rate code type for this rate code is <i>Points</i>, assign points to the rate code for this salary step. Set up the value of each point at the company level on the Company - Default Settings page.</p> <p>This field is hidden if you did not select the Salary Points check box on the Installation Table - HRMS Options page.</p>
Totals	The system calculates and displays the total value of the pay components that you assigned to the step. When you save the page, the system warns you if the total is outside the minimum or maximum ranges that you specified on the Salary Grade Table page.
Hourly Rate, Daily Rate, Monthly Rate, and Annual Rate	<p>The system displays these total values of all the rate codes of the salary step.</p> <hr/> <p>Note. When comparing the hourly rate to the maximum of the step rate, the system does not use rounding. Instead, it uses six decimal places to verify if the hourly rate is less than the maximum rate. Once this check is performed, the system displays the final number for the hourly rate, rounded to two decimal places.</p> <hr/>

(AUS) Australia

This group box appears only if the Education & Government check box on the Installation Table - Country Specific page is selected.

- Job Classification** Select the DETYA job classification.
- Minimum Classification and Maximum Classification** For Australian Public Service, select the minimum and maximum classifications for this salary step.

Setting Grade Advance Criteria

Access the Grade Advance Criteria page (Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Grade Advance Criteria).

Salary Grade Table | Categorization Defaults | Salary Step Components | **Grade Advance Criteria**

Set ID: SHARE Salary Administration Plan: KUH2 Administrative Workers

Salary Grade: 4 Standard Hours: 40.00 Salary Basis: Annl Basis

Grade Advance Criteria Find | View All | First 1 of 1 | Last

Effective Date: 01/01/1980 Status: Active + -

Description: WP Plan KUH2 Grade 4

Minimum Required Years:

Maximum Years:

Minimum Age:

Number of Reviews: Required Eligibility Points: Review Weight Total: 0.00

Review Weight Customize | Find | First 1 of 1 | Last

*Review Sequence	*Review Weight		
1	0.00	+	-

Grade Advance Criteria page

If the salary administration plan has a related wage progression rule, this page will not be available.

Grade Advance Criteria

- Minimum Required Years** Enter the number of years workers must be in this grade before they can advance from it. This value is the minimum number of years required in the grade.
- Maximum Years** Enter the maximum number of years workers can be in this grade. When checking for workers eligible for advancement from this grade, the system automatically includes those who have been in the grade this number of years, irrespective of all other criteria.
- Minimum Age** Enter the minimum age workers must be to be eligible to advance from this grade.

Note. This criterion refers to workers' education level age, not their actual age.

Number of Reviews	Enter the number of reviews the results of which the system will use to assess a worker's eligibility to advance from this grade. If you enter 3, for example, the system will count the results from the most recent review, the review before that, and the review before that. Only reviews that have the Include in Grade Advance check box selected on the Review Definition Table JPN page are included in this process.
Required Eligibility Points	This is the total number of eligibility points a worker must have attained to be eligible to advance from this grade.
Review Weight Total	The system keeps a running count of the weightings you add to the reviews in your Review Sequence. The total must be 100 when you have entered all the weightings. The system warns you if the sum of your weightings is not 100.
Review Sequence	<p>Enter a sequence number for the Number of Reviews you specified. Sequence number 1 is the most recent review, 2 is the review before that, and 3 is the review before that. The system uses the Review ID (which is a date) to associate the correct review with the correct sequence number and, therefore, the correct weighting.</p> <hr/> <p>Note. If you have more reviews defined as applicable for grade advance than you specify here, it does not matter. If you are only going back two reviews, the system ignores any earlier reviews even if they are defined as applicable for grade advance. You do not have to go back to the Review Definition Table JPN page and deselect the Include in Grade Advance check box. If the opposite is true—that is, you specify more reviews here than are defined as applicable for grade advance—the system warns that it was unable to get data when attempting to get review results.</p> <hr/> <p>If you do not want to weight the reviews, and you are using the non-weighted average review method, then enter the Number of Reviews and leave the Review Sequence(field) and Review Weight (next field) blank. The system will divide the review total by the number of reviews used in the calculation.</p>
Review Weight	Unless you are using the non-weighted "simple average" method to determine the number of points, enter the weighting for each review in the sequence.

(USF) Establishing Salary Steps Within a Salary Grade

Access the Salary Step Table page (Compensation, Base Compensation, Maintain Plans, Define Salary Grades USF, Salary Step Table).

Salary Grade Table		Salary Step Table								
Set ID:	SHARE		Std Hrs/Wk:	40.00						
Salary Administration Plan:	KUH2	Administrative Workers	Salary Basis:	A Annl Basis						
Salary Grade:	4		Currency Code:	USD Dollar						
Step Rate Table										
Find View All First 1 of 1 Last										
Effective Date:	01/01/1980	Status:	Active							
Description:	WP Plan KUH2 Grade 4									
Step Rates										
Customize Find First 1 of 4 Last										
*Step	US Federal Step	Hourly Rate	Biweekly Rate	Monthly Rate	Annual Rate	Weeks to Next Step Increment	Days to Next Step Increment	WGI Adjustment		
1	1	31.500000		5,460.00	65,520.00			80	+	-
2	2	36.000000		6,240.00	74,880.00			80	+	-
3	3	40.500000		7,020.00	84,240.00			80	+	-
4	4	45.000000		7,800.00	93,600.00			80	+	-

Salary Step Table page

Salary Basis

Displays the salary basis.

Federal Step

The step that is associated with the Federal pay plan.

Biweekly Rate

Displays the total biweekly rate value of all the rate codes of the salary step in the currency of the salary step.

Weeks to Next Step Increment

The number of weeks before the worker is moved into the next step based on the worker's entry date into the current step.

Days to Next Step Increment

The number of days before the worker is moved into the next step based on the worker's entry date into the current step.

WGI Adjustment

Define the leave without pay (LWOP) threshold hours. This is the number of consecutive LWOP hours before the within grade increase (WGI) due date is affected. The WGI/Tenure Update process compares threshold hours to the worker's unprocessed nonpay hours to determine if the worker's WGI due date was affected.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "(USF) Administering Additional U.S. Federal Payroll Functionality," Processing WGI, Tenure, and Probation Nonpay Hours.

Running Salary Grades and Salary Steps Reports

To generate reports for salary grades and salary step reports, use the Salary Grade (RUN_PER706A-), Salary Grade/Step (RUN_PER706B-), Salary Structure (RUN_CMP001), and Salary Grade Table Rpt USF (RUN_FGHR005) components.

This section discusses how to generate reports of the salary structure you have defined.

XML Publisher for PeopleSoft Reports

To offer our customers more robust and complete reporting solutions, Oracle's PeopleSoft Enterprise development teams are converting some of the existing Crystal reports into XML Publisher (XMLP) format. Oracle provides a standalone Java-based reporting technology named Oracle Business Intelligence Publisher (BI Publisher) that streamlines report and form generation. XMLP uses select features from BI Publisher that have been integrated into PeopleTools. XML Publisher for PeopleSoft Enterprise provides native XMLP technology for PeopleSoft Query and Connected Query, as well as any PeopleSoft application.

XMLP separates the data extraction process from the report layout. XMLP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, you can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) and in many languages.

Pages Used to Run the Salary Grades and Salary Steps Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Salary Structure	RUNCTL_ASOFDATA	Compensation, Base Compensation, Salary Plan Reports, Salary Structure	Run the Salary Structure report (CMP001). This report lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and then subtracting 1.0.

Page Name	Definition Name	Navigation	Usage
Salary Grade Table (XMLP)	PRCSRUNCNTL	Compensation, Base Compensation, Salary Plan Reports, Salary Grade, Salary Grade Table	Run the Salary Grade Table report (PER706A). This report lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.
Salary Grade/Step	RUNCTL_PER706B	Compensation, Base Compensation, Salary Plan Reports, Salary Grade/Step, Salary Grade/Step	Run the Salary Grade and Step Tables report (PER706B). This report lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.
Salary Grade Table Rpt USF	RUN_FGHR005	Set Up HRMS, Product related, Compensation, Salary Grade Table Rpt USF, Salary Grade Table Rpt USF	(USF) Run the Salary Grade Table USF report. This report prints the contents of the Federal Salary Grade tables in various formats.

Running the Salary Grade/Step Tables Report

Access the Salary Grade/Step page (Compensation, Base Compensation, Salary Plan Reports, Salary Grade/Step, Salary Grade/Step).

Salary Grade/Step

Run Control ID: 100
[Report Manager](#)
[Process Monitor](#)

Language: English

Report Request Parameter(s)

☐ Show Components

Salary Grade/Step page

Show Components Select if you want your report to display compensation component information.

Setting Up Base Compensation Budgeting and Planning

To set up base compensation budgeting and planning, use the Budget Types (SP_BUD_TYPE_TBL_GBL), Define Budgets (CONTROL_TBL_GBL), Salary Plan Default Values (SAL_PLAN_CONTROL_GBL), and Salary Plan Group Default Values (SAL_PLAN_CNTRL_GRP_GBL) components.

This section provides an overview of salary increase budgeting and planning, and discusses how to:

- Define budget types.
- Define budget default values.
- Establish group default control values for base compensation budgets and plans.

Understanding Salary Increase Budgeting and Planning

When you create salary increase budgets and plans, you first need to set up control data that the system uses to determine worker eligibility for salary increases. Set up sets of default control data that you can modify at the group level.

Complete these steps to set up default controls for salary increase budgets and plans:

1. Define budget default IDs on the Define Budgets page.
2. Define plan default control values on the Default Budget Parameters page.
3. Define budget default control values at the group level on the Assign Group Budget Parameters page.

The values that you save on this page are the default control values that the system enters on the Group Budgets component and Budget Description page when you establish salary adjustment budgets and plans for this group.

Pages Used to Set Up Salary Increase Budgeting and Planning

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Budget Types	SP_BUD_TYPE_TBL	Set Up HRMS, Product Related, Compensation, Base Compensation, Budget Types, Budget Types	Define budget types and assign default values for action and reason codes.
Define Budgets	CONTROL_TBL	Set Up HRMS, Product Related, Compensation, Base Compensation, Define Budgets, Define Budgets	Set up a budget plan that may span multiple budget periods.

Page Name	Definition Name	Navigation	Usage
Default Budget Parameters	SAL_PLAN_CONTROL	Set Up HRMS, Product Related, Compensation, Base Compensation, Default Budget Parameters, Default Budget Parameters	Define default budget and salary increase plan control dates, currency defaults, the salary increase method, eligibility dates, and the salary increase effective date.
Assign Group Budget Parameters	SAL_PLAN_CNTRL_GRP	Set Up HRMS, Product Related, Compensation, Base Compensation, Assign Group Budget Parameters	Establish default control values for salary increase budgets and plans that you set up for a particular group ID. The system populates this page with the default values you defined on the Default Budget Parameters page. You can change the default values for the group.

Defining Budget Types

Access the Budget Types page (Set Up HRMS, Product Related, Compensation, Base Compensation, Budget Types, Budget Types).

Budget Types

Type: MERIT

Budget Type Definition

Find | View All | First | 1 of 1 | Last

*Effective Date: 01/01/2000 Status: Active

*Description: Merit Increase

Default Values

*Action: PAY Pay Rt Chg

*Reason Code: MER Merit

Budget Types page

Effective Date	Enter an effective date for the budget type.
Status	Select <i>Active</i> or <i>Inactive</i> . Only budget types with a status of <i>Active</i> can be used.
Action	Select a value from the Action table.
Reason Code	Select a value from the Action Reason table.

Defining Budget Default Values

Access the Default Budget Parameters page (Set Up HRMS, Product Related, Compensation, Base Compensation, Default Budget Parameters, Default Budget Parameters).

Default Budget Parameters

Budget Default ID: HXECP **E-Comp Plan Default ID**

Default Values

*Budget Period Start Date:	01/01/2001	(Increases effective between these dates)
*Budget Period End Date:	12/31/2001	
*Salary Planning Start Date:	01/01/2001	(As of date for base salaries)
*Currency Code:	USD	US Dollar
Level of Proration:	A	Annual
*Default Rate Type:	OFFIC	Official Rate

Salary Increase Method

☒ All Employees at the Same Time ☐ Employee Anniversary Date

Eligibility Dates

New Hire Eligibility Date:	06/01/2000	(Cutoff for inclusion in plan)
----------------------------	------------	--------------------------------

Mexico

Increase Method

☒ By Budget ☐ By Matrix

Default Budget Parameters page

Use the default values you set up here when you define salary increase plans for worker groups.

Default Values

Budget Period Start Date and Budget Period End Date Enter the beginning date and ending date of the budget plan's effective period. The system uses the start and end dates that you enter here to verify that the increases you plan take effect between the two dates.

Salary Planning Start Date Enter the salary planning start date. The system basis its calculations for new increases on the salary planning start date.

Currency Code Select the currency code that you want the system to enter as the default currency code when you create salary increase plans. The system enters the base currency value in the Primary Permission List Preferences table defined for your user ID as the default value.

Level of Proration	Displays budget and salary plan calculations in the frequency that you select here. The available values are from the Frequency table.
Default Rate Type	Select the rate type that you want the system to enter as the default for your salary increase plans. Valid values are the exchange rate types that you previously established in the Rate Type table (RT_TYPE_TBL). The system uses this rate type for all currency conversions.

Salary Increase Method

Select one of the two options as the default method of implementing salary increases under your salary increase plans. You can change the method when you define salary increase plans for specific groups.

All Employees at the Same Time	Select if you want all salary increases under your salary plans to be implemented for all workers at the same time. If you select this option, the New Hire Eligibility Date field becomes available for data entry. The effective date of the workers' salary increases will be the effective date that you define for the increase on the Budget Requested page.
Employee Anniversary Date	Select if you want salary increases under your salary plans to be implemented on the worker's anniversary date. The anniversary date can be the worker's hire or rehire date. If you select this option, the New Hire Eligibility Date field becomes unavailable for data entry.

If you select this option, you must:

- Enter a budget period that spans an entire year (for example, *04/01/2000 to 03/31/2001*), and the effective date of the budget must be the budget period start date.
- Select *Annual* as the Level of Proration.
- Define only one increase in the budget. The effective date of the budget increase must be the same as the budget period start date. The worker's anniversary date will be the effective date of the increase in the worker's job data row.

You cannot define multiple increases by effective date and effective sequence if administration is by worker anniversary date.

- Run the Create/Refresh Anniversary Dates process before loading the increases to Job Data.

The process should be run before creating the budget. The system calculates the budget based on the list of workers created by this process.

Eligibility Dates

New Hire Eligibility Date

If you selected All Employees at the Same Time as the salary increase method, this field becomes available for data entry.

Enter the cutoff point for workers to be included in the plan. Any workers hired after this date will not appear in the budget or plan. This date must be prior to the salary planning start date.

(MEX) Mexico

In Mexico, you can define salary increase calculations in two ways:

- By Budget (standard budget raise method)

The standard method allows you to take the budgeted percentage and insert it into the worker's salary plan.

- By Matrix (salary increase matrix method)

The salary increase matrix method allows you to take the percentage from the salary increase matrix.

Once you select the By Matrix method on the Default Budget Parameters page and the Assign Group Budget Parameters page, you need to calculate the salary increase for the worker.

Establishing Group Default Control Values for Base Compensation Budgets and Plans

Access the Assign Group Budget Parameters page (Set Up HRMS, Product Related, Compensation, Base Compensation, Assign Group Budget Parameters).

Assign Group Budget Parameters

Group ID:

EI001

EI001

Group Default Values

Find | View All | First | 1 of 1 | Last

*Budget Default ID:

HXECP

E-Comp Plan Default ID

Start Date:

01/01/2001

End:

12/31/2001

*Budget Period Start Date:

01/01/2001

(Increases effective between

*Budget Period End Date:

12/31/2001

these dates)

*Salary Planning Start Date:

01/01/2001

(As of date for base salaries)

*Currency Code:

USD

US Dollar

*Level of Proration:

A

Annual

*Default Rate Type:

OFFIC

Official Rate

Salary Increase Method

☒ All Employees at the Same Time

☐ Employee Anniversary Date

New Hire Eligibility Date:

06/01/2000

(Cutoff for inclusion in plan)

Mexico

Increase Method

☒ By Budget

☐ By Matrix

Assign Group Budget Parameters page

Note. Even if you do not change any of the default values, you must open this page and save the data before you can create salary increase budgets or plans.

Group Default Values

- Budget Default ID**

Use this field to select the values you want the system to enter on this page as the default control values for this group. Set up the default values for Budget Default IDs on the Default Budget Parameters page.
- Start Date and End Date**

Displays the start and end dates of the budget period that you entered for this Budget Default ID on the Default Budget Parameters page.

Chapter 4

Administering Salary Plans, Grades, and Steps

This chapter provides overviews of salary plans, salary increase guidelines, and salary grades and steps, and discusses how to:

- Administer compensation with salary plan defaults.
- Administer salary increases.
- View worker salary structure information.
- Report worker salary structure information.

Understanding Salary Plans

This section discusses currency defaults and conversion in salary plans.

Set up each salary plan with a unique ID. The series of grades within all salary plans have the same IDs, such as grades 001 to 010. Similarly, the steps that are within grades have the same IDs, such as Steps 1 through 10. Therefore, the salary plans are similar in terms of structure. However, for each plan, you establish different monetary values for the grade ranges and for the different pay components, amounts, percents, and salary points for the salary steps. In this way, you create unique plans with similar structures but with different compensation.

You then establish default compensation packages by tying the unique salary plans to different locations, job codes, military ranks, or individual workers. These defaults ease the administrative burden both at hire and when a worker has a job change. For example, assume that you hire a worker into a particular grade and step at one location, and then transfer the worker to another location. When you enter the location change, the system automatically assigns the salary plan of the new location to the worker if you are storing salary plans in the Location table. The new salary plan brings with it the same grade and step structure, but the compensation is appropriate to the new location.

Currency Defaults and Conversion in Salary Plans

You specify a default currency code at each stage in the process of defining salary plans, grades, and step components. The system enters that currency code as the default at the next stage, which you can change. Define grades and steps in multiple currencies to accommodate the organization's needs.

The system performs compensation frequency conversion in the currency that is specified for the rate code. When the system totals the step components and validates the grade ranges, it converts all compensation rates to the currency of the grade.

The following table summarizes the source of the currency code default and the use of the currency code in calculations:

<i>Salary Plan Level and Page</i>	<i>Source of Default Currency Code</i>	<i>Use in Calculations</i>
Salary Plan. Salary Plan Table setup page.	The currency code that you select for the organization on the Installation table.	None (for defaults only).
Salary Grade. Salary Grade Table setup page.	The currency code that you select for the salary plan on the Salary Plan table.	On the Salary Grade Table page, the system displays the salary ranges in the currency of the grade for each frequency.
Salary Step. Salary Step Components setup page.	The currency code that you select for the salary grade on the Salary Grade table.	On the Salary Step Components page, the system displays the total compensation in the currency of the step for each frequency.
Salary Step Component. In the grid on the Salary Step Components setup page.	The currency that you define for the rate code on the Comp Rate Code table.	On the Salary Step Components page, the system displays the compensation rate for the rate code in this currency for each frequency.

Understanding Salary Increase Guidelines

The system ties the data in the Salary Increase Matrix table to salary increase plans and worker Pay Rate Change pages. It determines where a worker falls in the range by calculating salary minus the minimum divided by the spread. For example, a worker with a salary of 26,000 USD in a salary grade range of 25,000 to 30,000 falls into the first quartile because .20 is in the first quartile. Here is the formula:

$$\frac{(26,000 - 25,000)}{5,000} = \frac{1}{5} \text{ or } .20$$

Formula showing how the employee's salary falls into the first quartile

When the system indicates that an amount is out of range, refer to the matrix to see the overall structure of percentage increase guidelines and to make adjustments.

Understanding Salary Grades and Steps

Depending on how you structure the compensation plans, you can set up salary grades only or salary grades and salary step components. Salary grades define an appropriate salary range for a worker that is assigned to that grade. Step components define the actual recommended pay rate by component for a worker who is assigned to that step.

When you save a salary grade, the system creates a rate code default rule for the salary step, with the Rate Code Source Indicator equal to the salary step. The system uses rate code default rules (instead of the Job Code and Salary Step setup tables) for the compensation defaults. The remainder of this section discusses grade advance criteria for Japan.

(JPN) Setting Grade Advance Criteria

Grade advance criteria includes the number of reviews and their respective weights and the number of eligibility points that is required. The system checks for workers who meet the criteria that you specify here and reports those who are eligible to advance from the grade. Each grade has criteria that must be met before workers are eligible to advance from this grade to the next higher grade.

Weighted and Non-Weighted Sample Results

The decision to use weighted or nonweighted reviews has an effect on the results. In the examples that follow:

A is the worker's results.

B1 and B2 are settings for weighted and nonweighted (simple average) methods, respectively.

C1 and C2 are the results of A used with B1 and B2, respectively.

A: Worker's Review Results

This table shows the worker's review results:

<i>Review</i>	<i>Final Review Band Code</i>	<i>Review Points</i>
Most recent	A	80
Previous	S	100

B1: Weighted Method

This table shows B1 results using the weighted method:

<i>Review</i>	<i>Review Weight</i>
Most recent	60%
Previous	40%

B2: Nonweighted (Simple Average) Method

This table shows B2 results using the nonweighted simple average method:

<i>No. of Reviews</i>	<i>Review Weight</i>
2	NA

C1: Result of Using Weighted Method: $48 + 40 = 88$

This table shows C1 results using the weighted method:

<i>Review</i>	<i>Final Review Band Code</i>	<i>Eligibility Points</i>	<i>Review Weight (from B1)</i>	<i>Result of Weighted Review</i>
Most Recent	A	80	60%	
Previous	S	100	40%	

C2: Result of Using Nonweighted (Simple Average) Method: $= (80 + 100) / 2 = 90$

This table shows C2 results using the nonweighted simple average method:

<i>Review</i>	<i>Final Review Band Code</i>	<i>Eligibility Points</i>	<i>Result of Nonweighted Average Review</i>
Most Recent	A	80	
Previous	S	100	

Administering Compensation with Salary Plan Defaults

This section provides overviews on assigning default salary plans, grades, and steps to a worker, tying salary plans to job codes, locations, or labor agreements, and associating salary plans and grades to military ranks

Note. To load the data into tables use the LOCATION_TABLE and CI_JOB_CODE_TBL component interfaces.

Assigning Default Salary Plans, Grades, and Steps to a Worker

You specify a worker's salary administration plan, grade, and step on the Job Data - Salary Plan page. When you hire or transfer a worker, the system enters default values in these fields. You can assign default salary plans, grades, and steps to a worker in one or a combination of the following ways:

- Associate the salary plan with a location on the Location Profile page.
- Associate the salary plan with a job code on the Job Code Table - Default Compensation page.
- Associate a salary plan with a labor agreement on the Salary Plan Grades page.
- Assign a salary plan directly to a worker on the Job Data - Salary Plan page.
- Associate a salary plan with a military rank in the Military Service table, Grades Associated with Ranks page.

Whether you tie salary plans to locations, job codes, rank, or a combination of these, the system ultimately enters default compensation information on the worker's compensation record, where you can change it. The system verifies that any combinations of salary administration plans and grades that you select are valid and exist in the system. If the combination does not exist, the system issues a warning message.

Note. If you want the system to automatically enter step component rates in the job data, select Multi-Step Grade on the Installation Table - HRMS Options page.

Tying Salary Plans to Job Codes, Locations, or Labor Agreements

The system uses the salary grade and step from the Job Code table. It uses the salary plan ID to determine the compensation data that is associated with the grade and step. The salary plan ID can be tied to the job code, location, or labor agreement.

To set up a salary structure reflecting location differences, tie salary plans to locations in the Location table. The salary plan that is associated with the location overrides the salary plan that is tied to the job code. When you select a location for a worker in the Job Data pages, the system enters the salary plan ID from the Location table.

If location differences don't matter, enter a salary plan ID only in the Job Code table. When you select a job code for a worker in the Job Data pages, the system enters the salary plan from the Job Code table.

To set up a salary structure reflecting compensation differences reflecting wage agreements, associate the salary plan to the labor agreement on the Job Data - Salary Plan page.

See Also

[Chapter 3, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps, page 16](#)

Associating Salary Plans and Grades to Military Ranks

Military organizations use the salary plan and grade tables to set up the general salary plans and grades that fit the pay attributes of specific rank codes. Once these salary structures are created, users must access the Military Service table to create ranks and associate salary plans and grades to each rank.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Setting Up Military Rank Structure.

Administering Salary Increases

To administer salary increases, use the Automated Step Increment (RUNCTL_CMP007) and Automated Step Increment EG (RUN_CMP107) components.

This section provides overviews of salary increase administration and entering salary changes manually, lists common elements, and discusses how to:

- Enter salary increases by using the Automated Step Increase process.
- Move workers to the next step.
- (E&G) Move workers to the next step.

Understanding Salary Increase Administration

You administer salary changes in one of the following ways:

- Manually enter salary changes in the Job Data component or the Pay Rate Change component.
- (CAN, USA) Implement automated step increases by using the Automated Step Increase process.
- Tie salary increases to the worker's performance review.
- Create salary increase budgets and plans and load the mass increases to the job records.
- Process mass salary changes across the organization based on percent, pay group, or job code.

See Also

[Chapter 2, "Understanding Base Compensation and Budgeting," page 3](#)

[Chapter 9, "Processing Mass Salary Increases," page 175](#)

Entering Salary Changes in the Job Data Pages Manually

To manually enter changes to worker salary data, use the pages under Administer Workforce. Enter pay rate changes by using either the worker Job Data or the Pay Rate Change components. For administrative actions, such as promotions and transfers, use the Job Data component.

If you enter salary ranges on the Salary Grade Table page, then when you enter a compensation rate on the Compensation page in the Job Data or Pay Rate Change components, the system compares the new compensation rate against the values in the salary ranges. The system issues a warning message for amounts that are over or under the guidelines. You can still enter an out-of-range rate after you acknowledge the message. If you do not permit any out-of-range salaries in the organization, then the system changes the warning to an error message so that no out-of-range salaries can be entered.

See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Defining Salary Plan Characteristics, page 21

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information"

Common Elements Used in This Section

Salary Administration Plan	Select the plan for which you are running the automated step increase.
Start Date and End Date	Enter the start and end dates of the period for which you want to process salary increases. Only workers who are in the specified salary plan within this time period are eligible for a step progression.
Job Effective Date	<p>If this salary plan has an hourly-based step progression, enter the job effective date.</p> <p>If this salary plan has a date-based step progression, the job effective date is the previous step entry date plus the number of months that are required for the next step increase.</p>
Review Rating	Enter the minimum criteria for workers if the rating scale that you select is an average scale type.

Pages Used to Run the Automated Step Increase Process

Page Name	Definition Name	Navigation	Usage
Automated Step Increment	RUNCTL_CMP007	Compensation, Base Compensation, Maintain Plans, Automated Step Increment, Automated Step Increment	Automatically move workers to the next salary step when they complete the required time in the current step.
Automated Step Increment EG	RUNCTL_CMP107	Compensation, Base Compensation, Maintain Plans, Automated Step Increment EG, Automated Step Increment EG	Automatically move workers to the next salary step when they complete the required time in the current step.

Entering Salary Increases by Using the Automated Step Increase Process

If you enter *Date Based*, *Hours Based*, or *Either* in the Increment Type field on the Salary Step Components setup page, you can use the Automated Step Increase process (CMP107) to automatically move qualified workers to the next step. The system automatically inserts a new job data row for workers who meet the data in the Hours or Months to Next Step Increment fields. On the Automated Step Increase process run control page, you set minimum review conditions that a worker must meet before moving to the next step.

You follow a three-step procedure to run the Automated Step Increase process. All three steps are available in PeopleSoft Process Scheduler when you use the Automated Step Increase process run control page.

Note. When you run the Automated Step Increase process with an increment type of *Hours Based* or *Either*, you must have installed PeopleSoft Payroll for North America. The Automated Step Increase process retrieves the number of hours that you work from one of the following PeopleSoft Payroll for North America tables: US Earnings Balance or Canadian Earnings Balance.

You do not need to have PeopleSoft Payroll for North America installed to run the Automated Step Increase process with an increment type of *Date Based*.

To run the Automated Step Increase process:

1. (Optional) Run the Late Reviews process to notify supervisors about worker reviews that are late. This process selects all workers whose last review effective date is on or before the date that the process runs and whose next review date is before the date that the process runs or no next review date is assigned. If you have workflow enabled, this process creates a worklist entry for all managers whose workers have not yet received a review.
2. Run the process (CMP007) by using PeopleSoft Application Engine to find the workers who are receiving a step increase, and load this information to a temporary table.
3. Run the Automated Step Increase report to review all the data that is created by running PeopleSoft Application Engine.
4. Run the process (HR_SP_CI) by using Application Engine to load all the worker data to the Job Data pages.

Moving Workers to the Next Step

Access the Automated Step Increment page (Compensation, Base Compensation, Maintain Plans, Automated Step Increment, Automated Step Increment).

Automated Step Increment

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

Action: Reason: ☐ Update Future Rows
☐ Don't Absorb Changes

Step Increment Type

☐ Date Based ☐ Hours Based ☐ Both

Dates

From Date: End Date:

Hours

New Job Effective Date:

Process By

☐ Group ID ☐ Sal Admin Plan

Group Parameters

Group ID: As Of Date:

Salary Administration Plan

Business Unit: Sal Plan:

Performance Document Criteria

☐ Review Required

&Parameters Customize | Find |

Doc Type	Rating Model	Review Rating	Review Points
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>

Automated Step Increment page

- Action and Reason** Enter the action and reason for the workers who are receiving a step increase.
- Update Future Rows** When you select this option, the process updates all existing future effective-dated rows (rows that have an effective date that is later than the End Date) in addition to the effective-dated rows it is adding.
- Don't Absorb Changes** Select to ensure that the salary premium of the processed workers does not absorb any salary changes even if the salary plan has an associated absorbing rate code.
- This option only applies to workers who have a target compensation rate and are assigned to a salary plan with the automatically calculated premium function enabled.
- See Chapter 3, "Setting Up Base Compensation and Budgeting," Defining Salary Plan Characteristics, page 21.
- From Date and End Date** Enter the date range that you want to process.

New Job Effective Date If you use PeopleSoft Payroll for North America, enter the effective date of the new job.
Otherwise, the system calculates this date as: (actual step entry date) + (months to next step increment).

Process By

Group ID Select to process by group ID. The Group ID field becomes available for you to select the group ID of the worker group that you want to process.

Sal Admin Plan (salary administration plan) Select to process by salary administration plan. The Business Unit and Sal Plan fields become available for you to select the salary plan that you want to process.

Performance Document Criteria

Review Required Select this check box if a performance review is required.

Doc Type (document type) Select a value for the performance review.

Rating Model Select a value. These values come from the Rating Model table.

Review Rating Select a value. These values come from the Rating Model table.

Review Points Enter the number of points associated with the performance review.

(E&G) Moving Workers to the Next Step

Access the Automated Step Increment EG page (Compensation, Base Compensation, Maintain Plans, Automated Step Increment EG, Automated Step Increment EG).

Automated Step Increment EG

Run Control ID: FPS01

[Report Manager](#)[Process Monitor](#)

Run

Report Request Parameters

Set ID:

SHARE

User ID:

PS

Salary Administration Plan:

KU01

USA Salary Administration Plan

Salary Grade:

004

Start Date for Step Increments:

End Date for Step Increments:

Job Effective Date:

Processing Options

☐ Report Only

☒ Report & Process Increases

Audit Indicators

☒ Step

☐ Step Entry Date

☐ Compensation Rate

☐ Change Amount

☒ Hourly Rate

☐ Monthly Rate

☐ Annual Rate

☐ Change Percentage

Exclusions

CustomizeFind1 of 1

	Doc Type		Rating Model		Review Rating		
1	KOAN	Annual	EDGV	Ed & Govt	1		

Automated Step Increment EG

Start Date for Step Increments and End Date for Step Increments

Enter the start and end date of the period for which you want to process salary increases. Only workers who are in the specified salary plan during this time period are eligible for a step progression.

Processing Options

Report Only

Select if you want a report of the step increases for this plan and grade within the time periods, but you do not want to process the increases at this time.

Report & Process Increases

Select if you want to process the increases and produce a report.

Audit Indicators

Select the indicators that you want to include in audit information.

Exclusions

Doc Type (document type)

Select a value for the performance review.

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

51

Rating Model	Select a value. These values come from the Rating Model table.
Review Rating	Select a value. These values come from the Rating Model table.

Viewing Worker Salary Structure Information

This section discusses how to:

- View compa-ratios.
- View range calculations.

Viewing Compa-Ratios

Use the compa-ratio calculation to see where workers' salaries lie in relation to the midpoint range for their salary grades. The ratio appears in the Job Data - Compensation page for each worker.

The system calculates the ratio by comparing the worker salary to the midpoint amount of the salary grade. If the worker's current rate is the same as the midpoint, then the compa-ratio is 1.00, or 100 percent, of the midpoint. If the rate is above or below the midpoint, the system calculates a ratio for the difference between the salary and the midpoint, and then it adds or subtracts the difference from 1.00.

Viewing Range Calculations

Use the percent-in-range calculation to see where workers' salaries fall within the range that is set up for their salary grades. Both this calculation and the compa-ratio appear in the Pay Rate Change - Compensation page for each worker. The range percent indicates where the worker's salary falls within the worker's salary grade range. The system calculates the range percent as follows:

If the worker falls below the minimum range, then the system uses this formula:

$$\text{Range \%} = \left(\frac{\text{EE Salary} - \text{Min of Range}}{\text{EE Salary}} \right) \times 100$$

Range percent formula if the worker falls below the minimum range

If the worker falls above the maximum range, then the system uses this formula:

$$\text{Range \%} = \left(\frac{(\text{EE Salary} - \text{Max of Range}) \times 100}{\text{Max}} \right) \times 100$$

Range percent formula if the worker falls above the maximum range

If the worker falls in the range, then the system uses this formula:

$$\text{Range \%} = \left(\frac{\text{EE Salary} - \text{Min of Range}}{\text{Max} - \text{Min}} \right) \times 100$$

Range percent formula if the worker falls in the range

Reporting Worker Salary Structure Information

To run worker salary structure information, use the Job Grading by Evaluation Pts (RUN_CMP002), Ratio Analysis (RUN_CMP003), Below Minimum Analysis (RUN_CMP004), Above Maximum Analysis (RUN_CMP005), Salary History by Department (RUN_PER012), and Grade Advance Candidates JPN (PER062_JPN) components.

This section discusses how to run the Grade Advance candidate report.

After assigning salary plans, grades, and steps to locations, job codes, or workers, you can run the following reports to view lists and comparisons of the data: Job Grading by Evaluation Points, Compa-Ratio Analysis by Grade, Below Minimum Analysis, Above Maximum Analysis, and Departmental Salaries report.

Pages Used to Run Worker Salary Structure Reports

Page Name	Definition Name	Navigation	Usage
Job Grading by Evaluation Pts.	RUNCTL_ASOFDATA	Compensation, Base Compensation, Salary Plan Reports, Job Grading by Evaluation Pts.	Generate the Job Grading by Evaluation Points report (CMP002). This report lists each salary grade in the organization, with salary data for all the titles within that grade that were ordered by the job evaluation point assignment. The report includes all titles within that grade that were ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in the organization and, consequently, a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.
Ratio Analysis	RUNCTL_ASOFDATA	Compensation, Base Compensation, Salary Plan Reports, Ratio Analysis, Ratio Analysis	Generate the Compa-Ratio Analysis report (CMP003). The report lists each worker in the salary grade and the midpoint amount of the salaries that are in that grade. For each worker, the report lists job code, title, name, and department ID. The report displays those workers whose Employee Status is <i>Active</i> , <i>Leave of Absence</i> , <i>Suspended</i> , or <i>Leave with Pay</i> .

Page Name	Definition Name	Navigation	Usage
Below Minimum Analysis	RUNCTL_ASOFFDATE	Compensation, Base Compensation, Salary Plan Reports, Below Minimum Analysis	Generate the Below Minimum Analysis report (CMP004). This report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose worker status is active, leave of absence, suspended, or leave with pay.
Above Maximum Analysis	RUNCTL_ASOFFDATE	Compensation, Base Compensation, Salary Plan Reports, Above Maximum Analysis	Generate the Above Maximum Analysis report (CMP005). For each worker, the report shows the job code and title, name, department ID, the maximum amount, the worker's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those workers whose worker status is active, leave of absence, suspended, or leave with pay.
Salary History by Department	PRCSRUNCNTL_LC_HR	Compensation, Base Compensation, Compensation Reports, Salary History by Department, Salary History by Department	Run the Departmental Salaries report (PER012). This report provides an alphabetical list of workers by department, basic job data information, and a breakdown of pay rates for each.

Page Name	Definition Name	Navigation	Usage
Grade Advance Candidates JPN	RUNCTL_PER062_JPN	Compensation, Base Compensation, Salary Plan Reports, Grade Advance Candidates JPN	<p>Run the (JPN) Grade Advance Candidate List report (PER062JP) to list workers who are eligible to advance from the grade that you enter.</p> <p>The Grade Advance Candidate List Report is the output from the RUNCTL_PER062_JPN process. It lists all workers who are candidates for a grade advance because they meet the appropriate criteria. The criteria for eligibility for advancement is defined at grade level. The criteria include the results of worker reviews.</p>

(JPN) Running the Grade Advance Candidates Report

Access the Grade Advance Candidates JPN page (Compensation, Base Compensation, Salary Plan Reports, Grade Advance Candidates JPN).

Grade Advance Candidates JPN

Run Control ID: 1
[Report Manager](#)
[Process Monitor](#)

Language: English

Candidate Selection Conditions

Set ID: AUS01
Sal Plan: KA03
Grade: 003
As Of Date:

Nbr of Reviews:

Required Yrs in Current Grade:

Min Age:

Required Eligibility Points: 0.0

or

Max Yrs in Current Grade:

Applicable Reviews				
Review ID	Review Description	Doc Type	Doc Type Description	Review Weight
1				

Grade Advance Candidates JPN page

SetID	Enter the setID. This value is necessary because salary plans can be used in multiple sets.
Sal Plan (salary plan)	Enter the salary plan of the grade for which you want the candidate list.
Grade	Enter the grade on which you want the eligibility report.
Nbr of Reviews (number of reviews)	Displays the number of reviews that you specify for inclusion in the eligibility points count. This information comes from the Grade Advance Criteria page.
Required Yrs in Current Grade (required years in current grade)	Displays the number of years that workers must be in this grade before they become eligible to advance from this grade. This information comes from the Grade Advance Criteria page.
Min Age (minimum age)	Displays the minimum age that workers must reach before they can advance from this grade. This information comes from the Grade Advance Criteria page. The system uses the worker's education level age when determining this minimum age.
Required Eligibility Points	Even though you already defined the required eligibility points for a grade advance in the Grade Advance Criteria page, you have the flexibility to adjust this points criteria for actual reporting. For example, you may want to see how many more or how many fewer workers become eligible to advance from this grade if you reduce or increase the required points, respectively.
<i>—or—</i>	
Max Yrs in Current Grade (maximum years in current grade)	Displays the maximum years in the current grade that you set on the Grade Advance Criteria page. The system automatically lists as eligible all workers who reach the maximum years for the grade, irrespective of all other criteria.
Review ID	Displays the review IDs and descriptions of all the reviews that are included in the eligibility points count. The number of review IDs will equal the number that you specified in the Number of Reviews field on the Grade Advance Criteria page. The system selects the reviews based on their IDs, which are also their effective dates. For two reviews, it selects the most recent effective date or review ID and the next most recent effective date or review ID.
Doc Type (document type)	Displays the review type from the Review Definition page.
Review Weight	Displays the review weight that you entered on the Grade Advance Criteria page. If you use the non-weighted or simple average method and do not add any review sequences or weightings, then these fields will be blank. The system will total the review points and divide by the number of reviews from which those points came.

Chapter 5

Using Configurable Matrices

This chapter provides an overview of configurable matrices and discusses how to:

- Define sources for configurable matrices.
- Define results for configurable matrices.
- Define and maintain configurable matrices.
- Use special rules to create configurable matrices.
- Copy matrices.

Understanding Configurable Matrices

A configurable matrix is a special type of lookup table that can be designed and populated by the administrator. The administrator specifies the inputs (or criteria) that will be used as lookup variables and the outputs (or results) that the table will return for specific combinations of input values.

Examples of Configurable Matrices

The examples that follow illustrate the concept of matrices and their intended uses.

Simple Rate Matrix

Use this matrix to determine the compensation rate for a worker based on his department.

<i>Department ID - Input</i>	<i>Rate (USD per hour) - Output</i>
10012	10.00
10013	12.00
10014	14.00
10015	16.00

In this example, the single input is the *Department* of the worker, and the output is the *Rate*. If a worker is in Department 10012, then the pay rate is 10.00 USD per hour.

Matrix with Two Inputs and One Output

This matrix has two inputs and one output:

<i>Time with Company (months) - Input</i>	<i>Site Risk - Input</i>	<i>Rate (USD per hour) - Output</i>
0–24	Low	10.00
0–24	Medium	12.00
0–24	High	14.00
25–60	Low	12.00
25–60	Medium	14.00
25–60	High	15.00
61–120	Low	14.00
61–120	Medium	14.00
61–120	High	16.00
121–7200	Low	16.00
121–7200	Medium	17.00
121–7200	High	18.00

In this matrix, the rate is determined by a combination of the time in company and the risk level of the work site. A worker who has been with the company for 50 months and works at a Medium risk site will be compensated at the rate of 14.00 USD per hour.

Market Pay Matrix: Matrix with Multiple Outputs of Different Types

The outputs of a matrix can be of different types, and the following example is a matrix with multiple outputs, one of which is a percentage. You use this matrix to track the compensation rates for a job at various percentiles and different geographical areas. It also tracks rates for standard compensation figures, such as total cash compensation.

In this example, the only input is the geographical area; all other columns are outputs. You can associate this matrix with a specific job code, so that the compensation administrator can track market pay for that job code across different geographical regions.

Geography	Currency	Base 25th	Base 50th	Base 75th	Base 100th	Base Market Reference	Variable Target Percent	Mean Total Compensation	Total Compensation Reference
NORTH WEST REGION	USD	26,000	27,00	27,500	28,000	27,000	12.00	29,000	30,000
MID ATLANTIC REGION	USD	24,000	25,000	25,500	26,000	25,000	10.00	27,000	28,000
SOUTH WEST REGION	USD	27,000	28,000	28,500	29,000	28,000	11.00	30,000	31,000

Matrix with Calculated Results

You can embed calculations in the results returned by a matrix. In this example, the matrix returns rates calculated by applying a formula:

Step - Input	Reference - Output	Percentage to Apply - Output
1	Base Salary	5
2	Grade Range Maximum	90
3	Base Salary	4

For example, if the worker's base salary is 10,000 USD and the worker is on Step 1, then this matrix will return a rate (Base Salary \times 5%) = 10,500 USD.

Note. The system performs the appropriate checks to find the worker's *current* base salary. The base salary was not stored in the matrix.

Understanding Matrix Inputs and Outputs

This section discusses matrix inputs, outputs, and matrix evaluation rules for configurable matrices.

Matrix Inputs

Each matrix can have one or more inputs. These inputs are the search criteria against which you will evaluate a specific worker. The maximum number of inputs is 15. Each input is defined in the form of one or more source IDs.

Human Resources contains a number of predefined source IDs as system data. You can use those to build your configurable matrices. However, you can create also additional custom source IDs.

See [Chapter 5, "Using Configurable Matrices," Defining Sources for Configurable Matrices, page 64.](#)

Matrix Outputs

The outputs of a matrix are available in the form of Result IDs. You can have a maximum of 30 outputs for one matrix. The outputs are categorized into *result types*, based on their data format or the rules used to derive the result.

Base Compensation contains a number of predefined Result IDs as system data. These results can be used as outputs for the configurable matrices. However, you can create additional custom result IDs.

See [Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices," page 247.](#)

Matrix Evaluation Rules

Whenever the matrix is invoked, the system attempts to match the worker's data with keys in the matrix. The system checks all input variables against the keys defined for each input. The order of checking will be the same as the order in which the inputs were defined. At the first row where all input variables match the keys specified in the matrix, the system will return all result IDs for that row. When you are defining search keys, the system ensures that no rows are duplicated. You cannot have any blank search keys.

Using Wildcards as Search Keys

You can use wildcards when defining search keys. After you enter specific key values for one input, you can optionally add a wildcard key. If no explicit match is found against any of the other key values, then the wildcard key is considered a match. For example, assume you defined Dept ID as an input. You want to list specific non-zero rates for Dept IDs 101, 102, 103, and 104. However, for all other departments, you want a rate of 0. In this case, you would specify a total of five keys for the input, 101, 102, 103, 104, and '*' for the wildcard. Any worker not in Dept 101, 102, 103, and 104 would match the wildcard and would get a rate of 0. Using wildcards allows you to have a default rule defining what to do if the worker's data does not match any of the key values.

Understanding Matrix Types

This section discusses the three types of matrices you can create using the configurable matrices feature.

- Market pay matrix

This matrix captures market pay information for a given job. The market pay matrix can then be associated with specific job codes by using the Associate Mkt Pay to Job Codes page (Set Up HRMS, Product Related, Compensation, Market Pay, Associate Mkt Pay to Job Code). You can also associate the matrix directly on the Market Pay Match page of the Job Code definition component (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match).

- Rate matrix

This matrix is used to store compensation rates based on multiple criteria. You can then associate a rate matrix to a rate code defined on the Comp Rate Code Table page (Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table). The rate matrix can return compensation rates that are directly listed in the matrix or derived using formula-based result IDs.

- Salary increase matrix

This matrix is used to store the salary increase guidelines, as percentages of base salary. These guidelines are usually based on the worker's performance ratings and ratios, such as Compa-Ratio and Percent-In-Range. You can attach this matrix to specific rate codes in a group budget (Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Components). When calculating the budget, the system applies the appropriate increases to workers based on the criteria in the matrix.

Note. Depending upon the page, you can only associate a specific type of matrix to that page. For example, the system will only retrieve rate matrices when searching on a rate code definition page. Similarly, you can only associate market pay matrices to a job code.

Important! You cannot associate configurable matrices to seniority pay rate codes.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation*, "Setting Up Administer Compensation," Defining Rate Codes.

See [Chapter 7, "Budgeting and Planning Salary Increases," page 127.](#)

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Market Pay"

Understanding Matrix Displays

This section discusses how the system displays a configurable matrix.

Matrix Display

Within compensation processes, data is often presented and used in a two-dimensional table, or matrix form. An example is in salary increase guidelines, which store increase percentages for different performance ratings and percent-in-range ratios. How this data is presented affects how easily it can be understood. When defining inputs for a matrix, you can specify one of the inputs to be the column header instead of the row header. The following section explains this concept further.

Example: Displaying Inputs as Columns

Assume that you have two inputs (step and department) and one output (rate). The system can display the matrix in two ways.

Example 1: Each combination of inputs is like a row header.

Step	Department	Percent Rate
1	100	2
1	122	4

Step	Department	Percent Rate
2	100	6
2	122	8
3	100	10
3	122	12
4	100	14
4	122	16

Example 2: One input is a column header.

This display is easier to understand because the Department input was set to *Column* rather than to *Row*, which is the standard.

	Department	
Step	100	122
1	2	4
2	6	8
3	10	12
4	14	16

Defining Sources for Configurable Matrices

To define sources for configurable matrices, use the Define Sources (WCS_SOURCE_DEFN) component.

Note. You cannot create new source types.

This section provides an overview of source types, lists common elements, and discusses how to:

- Define sources based on addresses.
- Define sources based on dates.
- Define sources based on ratios.
- Define sources based on performance ratings.
- Define sources based on employee information.
- Define sources for related employee information.

- Define sources based on position information.
- Define sources based on related position information.
- Define sources based on geographical areas.
- Define sources based on salary grade step rates.
- Define sources based on length of time.
- Define sources based on supplied information.
- Define sources based on a matrix.

See Also

[Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices," page 247](#)

Understanding Source Types

This table describes the predefined source types that are available and shows you which type to use when defining your own source IDs. These sources types are system delivered:

Source Type	Description
ADDRESS	Employee Address. You can select fields from worker's address information.
DATES	Significant Dates. You can select a date from a predefined list of significant dates, such as date of hire, date of termination, and so on.
EMPINFO	Employee Information. You can select fields from core tables directly related to workers.
EMPRELATED	Related Employee Information. You can select fields from tables related to core tables for worker information.
GEOGRAPHY	Geography. You can define Source IDs to represent Geographical Areas.
MATRIX	You can define Source ID that represents a value indirectly derived from another matrix.
POSINFO	Position Information. You can select fields from core tables directly related to position information.
POSRELATED	Related Position Information. You can select fields from tables related to core tables for position information.
RATING	Performance Rating. You can define sources to represent performance rating by (performance) document type.

Source Type	Description
RATIOS	Rate Ratios. You can define sources to represent one of the three available ratios: Compa-Ratio, Job-Ratio, and Percent-in-Range.
STEPRATE	Step Rate from Employees Plan. You can define a Source to represent the compensation rate for a specific Salary Grade Step from the worker's Salary Admin Plan.
SUPPLIED	Supplied by Caller. This type is used when there is no lookup to any table field required, and the calling program or component will directly supply the actual value for the source.
TIMESPAN	Length of Time. You can define sources that measure the timespan between current date and a pre-specified date or significant dates on the worker's JOB record.

Common Elements Used in this Section

Effective Date	The effective date of the source ID definition.
Description	Description of the source ID.
Source ID	The unique name for the input to be used in the configurable matrix.
Source Type	The type of data to which the source refers. These are system-delivered. You cannot create additional source types.
Status	Select <i>Active</i> or <i>Inactive</i> .
	<hr/> Important! Sources must have a status of <i>Active</i> to be used to build configurable matrices. <hr/>
Comment	Add any relevant comments for this source.
Default Label	Enter the name for the source that will appear as row or column header when the matrix is displayed.
Element	Select the element from the available list of values, usually a field from a table. This will become the source of search keys for the matrix.
Data Type	This value is automatically set to <i>System Data</i> or <i>Customer Data</i> . System-defined source definitions will be set to <i>System Data</i> . You should not modify these definitions. When you create new source IDs, the data type will be set to <i>Customer Data</i> .

Pages Used to Define and Maintain Sources for Configurable Matrices

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Source Definition	WCS_SO_ADDRESS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the ADDRESS source type.
Source Definition	WCS_SO_DATES	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the DATES source type.
Source Definition	WCS_SO_RATIO	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the RATIOS source type.
Source Definition	WCS_SO_PERFORM	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the RATING source type.
Source Definition	WCS_SO_EMPL	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the EMPINFO source type.
Source Definition	WCS_SO_RELATED	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the EMPRELATED source type.
Source Definition	WCS_SO_EMPL	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the POSINFO source type.
Source Definition	WCS_SO_RELATED	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the POSRELATED source type.

Page Name	Definition Name	Navigation	Usage
Source Definition	WCS_SO_GEOGRAPHY	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the GEOGRAPHY source type.
Source Definition	WCS_SO_STEP_RATE	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the STEPRATE source type.
Source Definition	WCS_SO_TIME	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the TIMESPAN source type.
Source Definition	WCS_SO_SUPPLIED	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the SUPPLIED source type.
Source Definition	WCS_SO_OTHER_LKUP	Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition	Use this page to maintain sources and provide inputs (row information) for configurable matrices for the MATRIX source type.

Defining Sources Based on Addresses

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *ADDRESS* as a Source Type when creating a new source.

Source Definition

Source ID: COUNTRY
Source Type: Employee Address

Source Definition

Find | View All First 1 of 1 Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

Country of Business Address

Comment:

Country of Business Address

Default Label:

Country

*Address Type:

Business

*Element:

COUNTRY

Country

Data Type:

System Data

Source Definition page - ADDRESS source type

You can create a source that refers to any address type (home, work, mailing, and so on) and any field (address line, city, state, country) in the address.

Address Type Select the type of address.

Element Select the field that will define this source.

Defining Sources Based on Dates

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *DATES* as a Source Type.

Source Definition

Source ID: SENIORITY_DATE Source Type: Significant Dates

Source Definition Find | View All First ◀ 1 of 1 ▶ Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Seniority Date

Comment: Seniority Date

Default Label: Seniority Date

*Type of Date: Seniority Date

Data Type: System Data

Source Definition page - DATES source type

Type of Date

Select the date type for this matrix. Values are:

- *Date of Last Increase*: The date of the last increase, which is the Comp Rate on the worker's COMPENSATION record.
- *Date of Last Var Comp Award*: The date of last award paid out using the Variable Compensation functionality.
- *Hire Date*: The hire date on the EMPLOYMENT view, which is specific to Empl Record number.
- *Seniority Date*: The company seniority date on the EMPLOYMENT view.
- *Start of Current Grade*: The grade entry date on the worker's JOB record.
- *Start of Current Job*: The job entry date on the worker's JOB record.
- *Start of Current Position*: The position entry date on the worker's JOB record.
- *Start of Current Step*: The step entry date on the worker's JOB record.
- *Termination Date*: The termination date on the EMPLOYMENT view.

Defining Sources Based on Ratios

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *RATIOS* as a Source Type.

Source Definition

Source ID: COMPA-RATIO
Source Type: Rate Ratios

Source Definition

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

+ -

*Description: Compa Ratio

Comment: Compa Ratio

Default Label: Compa-Ratio

*Ratio Type: Compa Ratio

Data Type: System Data

Source Definition page - RATIOS source type

The system will calculate the appropriate ratio for the worker dynamically at runtime. The system uses the salary ranges based on the effective date of the transaction.

Ratio Type Select one of these values:

- *Compa Ratio*
- *Job Ratio*
- *Percent in Range*

Defining Sources Based on Performance Ratings

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *RATING* as a Source Type.

Source Definition

Source ID: PERFRATING

Source Type: Performance Rating

Source Definition

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Perf Rating

Comment: Perf Rating

Default Label: Perf Rating

*Document Type: SALARY

*Element: REVIEW_RATING

Data Type: System Data

Salary Planning

Review Rating

Source Definition page - RATING source type

- Document Type

Select a performance review document type from the available values. The list of document types will change based on the effective date of the Source ID.
- Element

Select the element that will define this source. The available values come from the EP_APPR record.

Defining Sources Based on Employee Information

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *EMPINFO* as a Source Type.

Source Definition

Source ID: JOBCODE Source Type: Employee Information

Source Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Job Code

Comment:

Default Label: Job Code

*Context: Job History

*Element: JOBCODE Job Code

Data Type: System Data

Source Definition page - EMPINFO source type

Context

Select a value. The system will allow you to select an element that is available through one of these contexts. This is the list of contexts, along with sample list of elements that are available within each context:

- *Effective Dated Personal Data*: Full-time student, Highest Education Level.
- *Employee Time Profile*: Time Period ID, Rule Element, Time Reporter Status.
- *General Employment Data*: Date Last Worked, 5% Owner, Probation Date.
- *Job History*: Company, Business Unit, Labor Agreement, Salary Plan, Grade.
- *Job Jr*: Assignment ID, Category Rate, Intercompany Transfer Data.
- *Names*: First Name, Last Name, Middle Name, Prefix.
- *Person Core Objects*: Birth data.
- *Person Org Assignments*: Benefit Record, Organizational Instance.

Element

Select the field that will define this source. The prompt list is based on the selected context.

Defining Sources Based on Related Employee Information

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *EMPRELATED* as a Source Type.

Source Definition

Source ID:MANAGER_LEVEL

Source Type:Related Employee Information

Source Definition

Find | View All | First1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:Manager Level of Job

Comment:Manager Level from Job Code

Default Label:Manager Level

Left | Right

General Employment Data

Job History

- Company - Company Table
- Department - Departments Table
- Job Code - Job Code Table
 - Company - Company Table
 - Salary Grade - Salary Grade Table
 - Salary Plan - Salary Administration Plan
 - Salary Step - Salary Step Table
 - Unions - Unions
 - ACTIVITY_TYPE_FRA - Activity Type
 - ANN_CNTACT_HRS_AUS - Annual Contact

Hours

ASCO_CD_AUS - ASCO Code

BARG_UNIT - Bargaining Unit

BA_CD - BA Code

BPS_ACTIVITY_CD - BPS Activity

Source Definition page - EMPRELATED source type (1 of 2)

74

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

Period	STD_HOURS - Standard Hours
	STD_HRS_FREQUENCY - Standard Work
Code	STEP - Step
	SURVEY_JOB_CODE - Salary Survey Job
Teaching Job	SURVEY_SALARY - Survey Salary
	TEACH_WEEKS_AUS - Total Weeks in
Classif	TECHNICAL - Technical
	TRN_PROGRAM - Training Program
	UK_SOC_CD - Standard Occupational
Classif	UNION_CD - Union Code
	US_OCC_CD - Occupational Classif. Code
	US_SOC_CD - Standard Occupational
Code	WORKERS_COMP_CD - Workers' Comp
a Work Day	WORK_DAY_HOURS - Number of Hours in
	Location - Location Table
	Paygroup - Paygroup Table
	Salary Grade - Salary Grade Table
	Salary Plan - Salary Administration Plan
	Salary Step - Salary Step Table
	Unions - Unions
	Job Jr
	Names
	Effective Dated Personal Data
	Person Core Objects
	Person Org Assignments
	Employee Time Profile
Data Type:	System Data

Source Definition page - EMPRELATED source type (2 of 2)

Click the folder icon in the tree to open the appropriate related table and then select the appropriate element by clicking the leaf node.

This tree allows you to derive a value from any table related to worker's Job record using the EmplID as a starting point. For example, if you want to use the Manager Level of the worker's Job Code as the source, you can link to it by opening the JOBCODE folder and clicking the Manager Level leaf node. You can use this source type to create source IDs for fields that are not available as system-defined source IDs.

Defining Sources Based on Position Information

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *POSINFO* as a Source Type.

Source Definition

Source ID: POS_SUPV_LVLSource Type: Position Information

Source Definition

Find | View All | First | 1 of 1 | Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

Position Supervisor Level

Comment:

Position Supervisor Level

Default Label:

Pos Supv Level

*Context:

Position Data

*Element:

SUPV_LVL_ID

Data Type:

System Data

Supervisor Level

Source Definition page - POSINFO source type

Element Select the field that will define this source.

Defining Sources Based on Related Position Information

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *POSRELATED* as a Source Type.

Source Definition

Source ID: JOB
Source Type: Related Position Information

Source Definition
Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900
*Status: Active

*Description: Job

Comment:

Default Label:

Left | Right

Position Data

- Company - Company Table
- Department - Departments Table
- Job Code - Job Code Table
- Location - Location Table
- Salary Grade - Salary Grade Table
- Salary Plan - Salary Administration Plan
- Salary Step - Salary Step Table
- Unions - Unions
- toDEPARTMENTS - Departments Table

Data Type: Customer Data

Source Definition page - POSRELATED source type

View various worker related information such as general employment data, job history, names, and so on.

Position Data

Click the folder icon in the tree to open the appropriate related table and then select the appropriate element by clicking the leaf node.

This tree allows you to derive a value from any table related to the position of the worker using the position number as a starting point. For example, if you want to use the Grade of the worker as the source, you can link to it by opening the Salary Grade folder and clicking the Grade leaf node.

Defining Sources Based on Geographical Areas

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *GEOGRAPHY* as a Source Type.

Source Definition

Source ID: GEOGAREA Source Type: Geography

Source Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Geographical Area

Comment: Geographical Area

Default Label: Geog Area

Data Type: System Data

Source Definition page - GEOGRAPHY source type

This source type is used to create sources that will always refer to Geographical Area definitions. One system-defined Source ID, *GEOGAREA* exists; however, you can create another source if you want a different name and label.

Note. Key values are not automatically validated for geographical areas. However, you can specify the prompt table *GEOGRAPHY_TBL* and prompt field *GEOGRAPHY_ID* when you add *GEOGAREA* as the input in the matrix component.

Defining Sources Based on Salary Grade Step Rates

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *STEPRATE* as a Source Type.

Source Definition

Source ID: STEP RATE Source Type: Step Rate from Employee's Plan

Source Definition

Find | View All First 1 of 1 Last

*Effective Date:

01/01/1900

*Status:

Active

+ -

*Description:

Step Rate

Comment:

Default Label:

*Salary Grade:

1

*Step:

1

*Frequency:

Monthly

Data Type:

Customer Data

Source Definition page - STEPRATE source type

This source returns the standard compensation rate for a given grade and step within the worker's salary administration plan. This type of source can be used to create rate matrices where the rates are dependent upon or related to rates on one or more grades and steps in the worker's salary administration plan.

Salary Grade Enter the grade (from the worker's salary plan) to which this source will refer.

Step Enter the step within that grade whose rate you want to use as the source.

Frequency Select the frequency with which you want the rate returned from these values: *Annual, Daily, Hourly, or Monthly.*

Defining Sources Based on Length of Time

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *TIMESPAN* as a Source Type.

Source Definition

Source ID: MONTHS_IN_COMPANY Source Type: Length of Time

Source Definition		Find View All First 1 of 1 Last
*Effective Date:	01/01/1900	*Status: Active
*Description:	Months in Company	
Comment:	Total time spent in company in months	
Default Label:	MonthsofService	
*Calculate From:	Hire Date	
Specified Date:		
*Frequency:	Months	
Rounding Rules:	Threshold	
Threshold (days):	18	
Data Type:	System Data	

Source Definition page - TIMESPAN source type

This source allows you to define as input the length of time elapsed between current (as of) date and a specified reference date. For example, if you want to create a rate matrix that will include pay rates based on how long the worker has been in the company, in that job, or in that grade, then you define a source of this type.

Calculate From

Select the type of date from which you want the length of time to be calculated. The available dates are:

- *Date of Last Increase*
- *Date of Last Var Comp Award*
- *Hire Date*
- *Seniority Date*
- *Specific Date*
- *Start in Current Grade*
- *Start in Current Job*
- *Start in Current Position*
- *Start in Current Step*
- *Termination Date*

Specified Date	<p>Enter the specific calendar date from which you want the length of time to be calculated.</p> <hr/> <p>Important! The Specified Date and Calculate From options are mutually exclusive. If you enter a specified date, you cannot select a date in the Calculated From field. If you select a date in the Calculated From field, you cannot enter a specified date.</p> <hr/>
Frequency	Select the frequency with which you want the length of time to be calculated. You can select <i>Hours</i> , <i>Days</i> , <i>Weeks</i> , or <i>Months</i> .
Rounding Rules	<p>Select a value that will represent the type of rounding to be applied to the timespan.</p> <ul style="list-style-type: none"> • <i>Anniversary</i>: This type of rounding will use anniversary date or time to round up or down. The calculations are performed as follows: <ul style="list-style-type: none"> • Hours and Days: This option does not apply. The system simply returns hours or days based on actual timespan. • Weeks and Months: This option will always round down to the nearest <i>whole</i> unit. For example, 4 weeks and 6 days will be rounded to 4 weeks, and 8 months and 29 days will be rounded to 8 months. • <i>Threshold</i>: This type of rounding offers more granular control on rounding. The calculations are performed as follows: <ul style="list-style-type: none"> • Hours and Days: No rounding. • Weeks and Months: Rounding depends on the threshold. <p>If the number of days in the threshold is less than or equal to the remainder from the calculated timespan, the system adds one more unit. For example, assume that the frequency was set to <i>Weeks</i> and the threshold was set to 5 days. If the timespan was calculated as 4 weeks and 5 days, the system would return $4 + 1 = 5$ weeks as the final value. However, if the threshold was 6 days, the system would return 4 weeks.</p> <p>For a frequency of <i>Months</i>, if the timespan was 2 months and 15 days and the threshold was set to 20 days, the system returns 2 months. If the threshold was 15 days or less, the system would return 3 months.</p>
Threshold (Days)	Enter the number of days to be used with the Rounding Rules field.

Defining Sources Based on Supplied Information

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *SUPPLIED* as a Source Type.

Source Definition

Source ID: EMPLID Source Type: Supplied by Caller

Source Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Employee ID

Comment: Employee ID

Default Label: EmplID

*Type of Data: Character

Length: 11

Data Type: System Data

Source Definition page - SUPPLIED source type

Use this type of source when the component that will use the matrix will pass the appropriate Input value (for the worker) directly, so that there is no lookup to any table to derive the value.

Type of Data Select from these values:

- *Character*
- *Date*
- *Number*

Defining Sources Based on a Matrix

Access the Source Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources, Source Definition) and select *MATRIX* as a Source Type.

Source Definition

Source ID: DEPTRATE_MTX Source Type: Lookup From Other Matrix

Source Definition		Find View All First 1 of 1 Last
*Effective Date:	01/01/2000	*Status: Active
*Description:	Dept Rate from Matrix KUR002	
Comment:	This source returns the hourly rate for the department using KUR002 matrix	
Default Label:	DeptRate	
*Matrix ID:	KUR002	Department Based Rate Matrix
*Matrix Result ID:	NEW_AMOUNT	New Rate
Data Type:	Sample Data	

Source Definition page - MATRIX source type

With this source, the system evaluates the key for the input dynamically by referring to another matrix and using one of the results from that matrix as the key value.

See [Chapter 5, "Using Configurable Matrices," Defining Inputs for Matrices, page 99.](#)

Matrix ID Select from the list of available matrices.

Matrix Result ID Select the result ID (output) from the matrix that will be used as the source ID.

Example: Health Benefits Rates Using a MATRIX Type Source ID

Suppose you are creating a matrix to determine health benefit allowance amounts. However, you want to base the health benefits on standard hourly rates for each department. If the hourly rates are below a certain amounts, then you will give health benefits. The matrix may look like this example:

<i>Standard Hourly Rate</i>	<i>Health Benefit Rate</i>
10–12	4
13–15	3
16–20	2
21–100	0

In this case, you need a way to dynamically get hourly rates for the worker's department. A source of type Matrix is useful in this case. In the previous example, you define a source that will return the rate for the worker's department. You specify which matrix has department rates and which result ID from that matrix is the rate value.

In the health benefits table, the Std Hourly Rate would be defined using the DEPTRATE_MTX source ID.

Defining Results for Configurable Matrices

To define results for configurable matrices, use the Define Results (WCS_RESULT_DEFN) component.

This section provides an overview of results for configurable matrices, lists common elements, and discusses how to:

- Define results based on the SIMPLECHAR (simple character) result type.
- Define results based on the SIMPLENUM (simple number) result type.
- Define results based on the SIMPLEDATE (simple date) result type.
- Define results based on the INCRBYAMT (increment by amount) result type.
- Define results based on the PCNTOFBASE (percent of base) result type.
- Define results based on the THRESHOLD result type.
- Define results based on the SOURCE result type.
- Define results based on the MATRIX result type.

Understanding Results for Configurable Matrices

Results (result IDs) represent outputs for configurable matrices. A result ID is simply a standardized name for one of the outputs from a matrix. By using standardized names, the applications and components that query a matrix can know what set and type of results to expect after they perform a lookup. For example, if you expect to get a percentage value back, the name PERCENTAGE is more intuitive than NUMBER1. If you expect to get an amount that represents a compensation rate, the name COMPRATE is better than AMOUNT.

The system delivers result IDs, but you can also create new ones. The simplest result IDs are free-form values of type, character string, numbers, or dates. Using free-form values, you enter values into the matrix that are directly returned to the calling program when the matrix is evaluated. For example, in a rate matrix, the compensation rate can be stored as an AMOUNT result ID that has values of 10, 12, and so on. Note that currency and frequency concepts are derived automatically based on context. The matrix simply stores the numbers.

Advanced result types also exist. For these, the system performs a formula-based calculation or a lookup operation and returns the final value as the result.

See [Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices," page 247](#).

The four special result types are:

- INCRBYAMT (increment by amount)

See [Chapter 5, "Using Configurable Matrices," Defining Results Based on the INCRBYAMT Result Type, page 89.](#)

- PCNTOFBASE (percent of base)

See [Chapter 5, "Using Configurable Matrices," Defining Results Based on the PCNTOFBASE Result Type, page 91.](#)

- THRESHOLD

See [Chapter 5, "Using Configurable Matrices," Defining Results Based on the THRESHOLD Result Type, page 92.](#)

- SOURCE

See [Chapter 5, "Using Configurable Matrices," Defining Results Based on the SOURCE Result Type, page 93.](#)

Common Elements Used in this Section

Status	Select <i>Active</i> or <i>Inactive</i> .
	Important! Results must have a status of <i>Active</i> to be used to build configurable matrices.
Comment	Add relevant comments about the result.
Default Label	Enter the name for the result.
Result Usage	Select one or more values to indicate which type of matrices will use this result: <ul style="list-style-type: none"> • <i>Market Pay Surveys</i> • <i>Rate Tables</i> • <i>Salary Increase Matrix</i>

Pages Used to Define and Maintain Results for Configurable Matrices

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Result Definition	WCS_RES_SIMPLECHR	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the SIMPLECHAR result type.

Page Name	Definition Name	Navigation	Usage
Result Definition	WCS_RES_SIMPLENUM	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the SIMPLENUM result type.
Result Definition	WCS_RES_SIMPLEDATE	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the SIMPLEDATE result type.
Result Definition	WCS_RES_INCR_BASE	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the INCRBYAMT result type.
Result Definition	WCS_RES_PCT_BASE	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the PCNTOFBASE result type.
Result Definition	WCS_RES_THRESHOLD	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the THRESHOLD result type.
Result Definition	WCS_RES_SOURCE	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the SOURCE result type.
Result Definition	WCS_RES_OTHER_LKUP	Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition	Maintain results returned from configurable matrices using the MATRIX result type.

Defining Results Based on the SIMPLECHAR Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *SIMPLECHAR* (simple character) as a Result Type.

Result Definition

Result ID: SURVEY_JOBCODE Result Type: Simple Character

Result Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/2000 + -

*Status: Active ▼

*Description: Survey Job Code

Comment:

Default Label: Survey Job Code

Type of Data: Character

Length: 10

Data Type: System Data

Result Usage

Market Pay Surveys + -

Result Definition page - SIMPLECHAR result type

This type of result ID stores simple character string values with an appropriate label. In this example, the result ID SURVEY_JOBCODE is being defined. This result ID can then be used in a market pay matrix so that compensation specialists can refer to market pay by job code. Since the job code is coming from a survey database, it is stored as a character string.

Length Enter the maximum number of characters allowed to store the value.

Defining Results Based on the SIMPLENUM Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *SIMPLENUM* (simple number) as a Result Type.

Result Definition

Result ID: 50_PERC

Result Type: Simple Number

Result Definition

Find | View All | First 1 of 1 Last

*Effective Date:

01/01/2000

+ -

*Status:

Active

*Description:

50th Percentile

Comment:

Default Label:

50th Percentile

Type of Data:

Number

Total Length:

12

Decimal Positions:

2

Data Type:

System Data

Result Usage

Market Pay Surveys		+ -
Salary Increase Matrix		+ -

Result Definition page - SIMPLENUM result type

This type of result stores simple numbers that represent different values. For example, the 50_PERC result ID can be used in salary increase guidelines matrices and in market pay matrices to track the 50th percentile values for different numbers, such as compa-ratios and base compensation market rates.

Defining Results Based on the SIMPLEDATE Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *SIMPLEDATE* (simple date) as a Result Type.

Result Definition

Result ID: SURVEY_DATE
Result Type: Simple Date

Result Definition

Find | View All First 1 of 1 Last

*Effective Date:

01/01/2000

+ -

*Status:

Active

*Description:

Survey Date

Comment:

Default Label:

Survey Date

Type of Data:

Date

Data Type:

System Data

Result Usage

Market Pay Surveys

+ -

Result Definition page - SIMPLEDATE result type

This result type stores date values in the matrix. For example, you can use it to track the date of the surveys that are tracked in market pay matrices.

Defining Results Based on the INCRBYAMT Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *INCRBYAMT* (increment by amount) as a Result Type.

Result Definition

Result ID: INCREMENT_AMOUNT
 Result Type: Increment By Amount

Result Definition
Find | View All First 1 of 1 Last

***Effective Date:** 01/01/2000

***Status:** Active

***Description:** Increment Amount

Comment:

Default Label: Incr Amount

Type of Data: Number

Total Length: 12

Decimal Positions: 2

Data Type: System Data

Result Usage

Rate Tables

Result Definition page - INCRBYAMT result type

Total Length Enter the number of characters for the result ID.

Decimal Positions Indicate how many decimal places to use for the number format.

Using the Increment by Amount Result Type

This result type uses the number entered as an amount to be applied to another result. It requires you to specify the target Result ID to which this amount will be applied. You can enter both positive and negative numbers, so you can increment or decrement the target value. For example, assume that you have a matrix for calculating rates based on Department. Each department has a fixed base rate (which can vary by department). However, you want to calculate the final rate as an increment of the base rate. In this case, you will have one Result ID called Base Rate (of type SIMPLENUM) and another Result ID called Final Rate (of type INCRBYAMT).

The matrix looks like this:

<i>Department (Source)</i>	<i>Base Rate (Result)</i>	<i>Final Rate (Result)</i>
1010	10	-2
1020	10	-1
1030	12	-1

<i>Department (Source)</i>	<i>Base Rate (Result)</i>	<i>Final Rate (Result)</i>
1040	12	1

If a worker is in Dept 1010, the system will return $10 - 2 = 8.00$ as the value in Final Rate result ID. Note that when you are defining the matrix, you entered a value of -2 in the cell for Final Rate, but the system uses that value as the amount to add and returns 8 *in the same result ID* at runtime. You do not need to define another result ID to hold the value from the calculation.

If a worker is in Dept 1040, the value in Final Rate result ID will be $(12 + 1) = 13.00$.

Defining Results Based on the PCNTOFBASE Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *PCNTOFBASE* (percent of base) as a Result Type.

The screenshot shows the 'Result Definition' page for the 'PCNTOFBASE' result type. The page is titled 'Result Definition' and has a sub-header 'Result Definition'. The 'Result ID' is 'PERCENT_TO_APPLY' and the 'Result Type' is 'Percent Of Base'. The page includes a search bar with 'Find | View All' and a pagination indicator '1 of 1'. The main form contains the following fields:

- *Effective Date: 01/01/2000 (with a calendar icon)
- *Status: Active (with a dropdown arrow)
- *Description: Percent to Apply
- Comment: (empty text area)
- Default Label: Pct to Apply
- Type of Data: Number
- Total Length: 6
- Decimal Positions: 2
- Data Type: System Data

At the bottom, there is a 'Result Usage' section with a dropdown menu showing 'Rate Tables' and navigation buttons (+ and -).

Result Definition page - PCNTOFBASE result type

Total Length Enter the total length of the number format.

Decimals Enter the number of decimal places to use for the number format.

Example: PCNTOFBASE (percent of base) Result Type

This result type uses the number entered as a percentage to be applied to another result. You must specify the target result ID to which the percentage will be applied. For example, assume you have a matrix for calculating rates based on Department. Each department has a fixed base rate, which can vary by department. However, you want to calculate the final rate as a percentage of the base rate. In this case, you will have one result ID called Base Rate (type SIMPLENUM) and another result ID called Final Rate (type PCNTOFBASE).

This example illustrates a rate matrix using the PCNTOFBASE result type:

Dept	Base Rate	Final Rate
1010	10	85
1020	10	90
1030	12	100
1040	12	110

Using this example, if a worker is in Dept 1010, the system returns $10 \times 85\% = 8.50$ as the value of the Final Rate result ID.

Note. When you defined the matrix, you entered a value, 85, for the Final Rate, but the system uses that as the percentage to apply, and it returns the value *in the same result ID* at runtime. You do not need to define another result ID to hold the value from the calculation.

If a worker is in Dept 1040, the value of the Final Rate result ID is $12 \times 110\% = 13.20$.

Defining Results Based on the THRESHOLD Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *THRESHOLD* as a Result Type.

Result Definition

Result ID: THRESHOLD

Result Type: Threshold Rounding

Result Definition

Find | View All First 1 of 1 Last

*Effective Date:

01/01/2000

+ -

*Status:

Active

*Description:

Threshold

Comment:

Default Label:

Threshold

Type of Data:

Number

Total Length:

10

Decimal Positions:

2

Data Type:

System Data

Result Usage

Rate Tables

+ -

Result Definition page - THRESHOLD result type

This result type allows you to apply rounding based on threshold differences between a *calculated* value and a *reference* value. When used within a matrix, this result requires two other Result IDs as parameters. The system takes the first (calculated) result and subtracts it from the second (reference) result. The difference is compared to the amount in the threshold result. If the difference is less than the threshold amount, the matrix returns the reference value in the threshold result ID. If the difference is greater, the matrix returns the calculated value.

For example, assume that you are calculating increases in compensation rates based on salary steps, but you want to round up to the next step rate when the difference between the calculated rate and the next step rate is less than a specified threshold amount. Assume a worker is on Step 3 at the rate of 8.50 USD per hour. The rate for Step 4 is 9.00 USD. For all workers who get a raise such that their new rate is within 0.20 USD of 9.00 USD, you want to automatically set their rate to 9.00 USD. If the increase matrix gives the worker a 5 percent increase, the new rate is 8.925 USD. Since this rate is within 0.20 USD of the 9.00 USD rate for Step 4, the system returns a new rate of 9.00 USD.


Defining Results Based on the SOURCE Result Type


Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *SOURCE* as a Result Type.

Result Definition



Result ID: ANNUAL_RATE_SOURCE **Result Type:** Source as Result

Result Definition Find | View All | First 1 of 1 Last


***Effective Date:** 01/01/2000  + -

***Status:** Active 

***Description:** Annual Compensation Rate

Comment:  

Default Label: Annual Rate Src

***Source ID:** ANNUAL_RATE  Annual Comp Rate

Type of Data: Number

Total Length: 19

Decimal Positions: 3

Data Type: System Data

Result Usage

Rate Tables + -

Result Definition page - SOURCE result type

Source ID

Select a source ID that this result ID will implicitly evaluate and return the source's value as the final result. The list of possible source ID values comes from the Sources Definition.

This type of result ID returns the value of a referenced source ID as its value. The final result is the value of the source. As an example, assume you needed to create a rate matrix for calculating bonuses as a percentage of workers' annual compensation rates. However, the bonus percentages will vary by department. Therefore, the single input to the matrix is Dept, and the two results are Annual Rate and Bonus Pct.

The matrix looks like this:

<i>Dept (Source)</i>	<i>ANNUAL_RATE_SOURCE (Result)</i>	<i>Bonus Percent (Result)</i>
101	ANNUAL RATE	4
102	ANNUAL RATE	4
103	ANNUAL RATE	5
104	ANNUAL RATE	6

Since you do not know each worker's annual rates, you define one result ID of type of SOURCE, called ANNUAL_RATE_SOURCE, and associate it to the Source ID ANNUAL_RATE. Then, you define a second result ID of type PCNTOFBASE, called BONUS_PCT, which tracks the bonus percentages. You specify the ANNUAL_RATE_SOURCE result ID as the target result ID to which the bonus percentage is applied. When this matrix is evaluated, the following actions will occur:

1. Since Dept is the required input, the system looks up the worker's department (for example, 103).
2. The system looks up results for Dept 103.
3. For the Annual_Rate_Source result, the system looks up the ANNUAL RATE of the worker and returns that value (for example, 10,000 USD).
4. For the Bonus Pct result, the system applies the bonus percent, 5, to 10,000 USD and returns a value of 500 USD.

Defining Results Based on the MATRIX Result Type

Access the Result Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results, Result Definition) and select *MATRIX* as a Result Type.

Result Definition

Result ID: DEPTRATE_MTX
 Result Type: Other Matrix' result

Result Definition
Find | View All | First 1 of 1 Last

***Effective Date:** 01/01/2000

***Status:** Active

***Description:** Dept Rate from Matrix KUR002

Comment: This is the rate from the rate matrix KUR002

Default Label: DeptRate

***Matrix ID:** KUR002 Department Based Rate Matrix

***Matrix Result ID:** NEW_AMOUNT New Rate

Type of Data: Number

Total Length: 12

Decimal Positions: 2

Data Type: Sample Data

Result Usage

Rate Tables			
Salary Increase Matrix			

Result Definition page - MATRIX result type

Matrix ID	Select the matrix on which this result should be based.
Matrix Result ID	Select a result ID (for the matrix) on which this result should be based.

This type of result uses one of the result IDs of another matrix as its value. When a matrix using this result is evaluated, the system evaluates the referenced matrix to get the final value. For example, assume that you want to set up a payment structure for health benefits, and you decide that the company will pay health benefits at 20 percent of the standard compensation rate by department. To determine a worker's health benefit rate, you need to determine their department's standard compensation rate. However, the standard compensation rate itself is dynamically set based on Salary Grade steps. Assume that the standard rate is derived using the KUR001 rate matrix, which has NEW_AMOUNT as the result. Then, the system would use the NEW_AMOUNT result of that matrix as the reference rate. The system can now apply a percentage of that result (using PCNTOFBASE) to get a final health benefit rate.

In this case, the Matrix ID is *KUR001*, and the Matrix Result ID is *NEW_AMOUNT*.

Defining and Maintaining Configurable Matrices

To define configurable matrices, use the Define Matrices (WCS_LK_TBL_DEFN) component.

This section lists common elements and discusses how to:

- Define matrices.
- Define inputs (source IDs) for matrices.
- Define matrix output (result IDs) information.
- Define search keys for configurable matrices.
- Load values from the prompt table.
- Enter data content fields.
- View matrix results.

Common Elements Used in this Section

Description	Enter a description for the matrix.
Status	Select <i>Active</i> or <i>Inactive</i> . <hr/> Important! Matrices must have a status of <i>Active</i> to be used in any business process. <hr/>
Comment	Add relevant comments for this matrix.
Default Label	Enter the label.

Pages Used to Define and Maintain Configurable Matrices

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Matrix Definition	WCS_LK_TBL_DEFN	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition	Define and maintain matrices.
Inputs	WCS_LK_TBL_INPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs	Define inputs to the configurable matrix.
Outputs	WCS_LK_TBL_OUTPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs	Define outputs of the matrix.
Search Keys	WCS_LK_TBL_KEYS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys	Specify the search keys to be used to match worker data.
Load Configurable Matrix Keys	WCS_LK_TBL_KEY_SEC	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys Click the Select Values from Prompt Table link.	Automatically load search keys for specific sources using a prompt table.
Data Content	WCS_LK_TBL_DATA	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content	Enter values for the output data.
View	WCS_LK_TBL_VIEW	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View	View the matrix as of the last saved version.

Defining Matrices

Access the Matrix Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition).

Matrix Definition		Inputs	Outputs	Search Keys	Data Content	View						
Matrix Name: KUS001												
<div>Matrix Definition First 1 of 1 Last</div>												
*Effective Date:	01/01/2000		*Status:	Active								
*Description:	Pos In Range Salary Increase											
Short Description:	POSINRNG											
*Matrix Type:	SALMATRIX Salary Increase Matrix											
<div>Matrix Environment</div>												
Matrix Usage (Results):		SALMATRIX Salary Increase Matrix										
<div>Matrix Orientations (Sources)</div> <table border="1"> <thead> <tr> <th>Orientation</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>EMPLOYEE</td> <td>Employee</td> <td></td> </tr> </tbody> </table>							Orientation	Description		EMPLOYEE	Employee	
Orientation	Description											
EMPLOYEE	Employee											
Comment:												
<div> Last Updated: 07/15/04 7:17:02.000000PM Last Updated By: PS </div>												

Matrix Definition page

Note. All matrices are created with a status of *Inactive*. You must change the status to *Active* to use them.

Matrix Type

Select the matrix type on which the configurable matrix should be based. Values are:

- *MARKETPAY* (market pay surveys).
- *RATE* (rate tables).
- *SALMATRIX* (salary increase matrices).

Orientation

The orientation indicates the starting point for associating the employee ID to other related fields. If all sources used in the matrix can be evaluated using EMPLOYEE and JOB records only, then you only need the EMPLOYEE orientation. If sources can be evaluated starting from worker's Position information, then you can add POSITION as another orientation.

Note. You must have at least one orientation. You can, however, have both orientations.

If the information available to the calling program is only position data and not the employee ID, then you need POSITION as an orientation to allow the matrix to evaluate the sources.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Market Pay"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

Chapter 7, "Budgeting and Planning Salary Increases," page 127

Defining Inputs for Matrices

Access the Inputs page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs).

Matrix Definition
Inputs
Outputs
Search Keys
Data Content
View

Matrix Name: KUS001

Matrix Definition
First 1 of 1 Last

Effective Date: 01/01/2000 Status: Active

Description: Pos In Range Salary Increase

Matrix Type: Salary Increase Matrix

Matrix Inputs
First 1-2 of 2 Last

*Order: 10 *Label: Perf Rating + -

*Key Type: Match Type of Data: Char

Decimals: 0 *Display As: Row

Optional Prompting

Sources for Resolving Input Customize First 1 of 1 Last

*Source ID	Description	Orientation		
PERFRATING	Perf Rating	EMPLOYEE	+	-

*Order: 20 *Label: Pos in Range + -

*Key Type: Range Type of Data: Number

Decimals: 2 *Display As: Column

Range Rules

*Range Lookup Method: Use Higher Limit

When Outside Range

☒ Use First Limit if Under

☒ Use Last Limit if Over

☐ Interpolate Result IDs

Optional Prompting

Sources for Resolving Input Customize First 1 of 1 Last

*Source ID	Description	Orientation		
PERCENT-IN-RANGE	Percent in Range	EMPLOYEE	+	-

Inputs page

Matrix Inputs**Order**

Enter the numerical value to indicate the order in which the inputs should appear in the configurable matrix. This value will also determine the order in which the inputs are evaluated against the worker data.

Label

Enter the label that will appear.

Key Type	<p>Select a value:</p> <ul style="list-style-type: none"> • <i>Match</i>: The system will check for an exact match, if available. • <i>Range</i>: The system will check against a range of values, if available.
Decimal	Enter the number of decimal positions to maintain for numeric inputs. This field will be grayed out as applicable.
Display As	<p>Select whether this input should appear as a <i>Row</i> or a <i>Column</i> header.</p> <hr/> <p>Important! Only one input can be selected as a column header. However, you can choose to have all inputs appear as rows.</p> <hr/>

Optional Prompting

If you want the ability to enter search keys from a prompt table, you can use this section to specify the table, the field, and, if appropriate, the setID.

Note. The system does not enforce that search keys must exist in that table. You are allowed to enter search keys that are new and do not exist in any table.

Sources for Resolving Input

Source ID	<p>Select one or more sources that can be used to derive the matrix inputs. For example, if you are defining an input for JOBCODE, you should select the JOBCODE source ID. Every input is defined using at least one source; therefore, you must select at least one source.</p> <hr/> <p>Note. You can leave the label for the input blank, and upon selecting the source, the system will populate the label field with the default label for that source.</p> <hr/>
------------------	--

Range Rules

Range Lookup Method	<p>Select the method that dictates which breakpoint (range) the system should consider as a match. Values are:</p> <ul style="list-style-type: none"> • <i>Use Higher Limit</i>: The system retrieves the matrix data for the breakpoint higher than the input value. • <i>Use Lower Limit</i>: The system retrieves the matrix data for the breakpoint lower than the input value. • <i>Use Nearest Limit</i>: The system retrieves the matrix data for the breakpoint closest to the input value.
----------------------------	--

The following example illustrates how ranges work. Assume that Percent-In-Range is the input. The typical ranges are 0–40%, 41–60%, 61–80%, and 81–100%. For this example, we will only use the last 3 ranges (41–100%). When defining these ranges in a configurable matrix, we only enter the range breakpoints, which in this example are 40, 60, 80, and 100. The system interprets these breakpoints as defining the following ranges:

Range Breakpoints	Range Breakpoints are equal to
40	All values below 40, up to and including 40.
60	All values greater than 40, up to and including 60.
80	All values greater than 60, up to and including 80.
100	All values greater than 80, up to and including 100.

Analyzing the Lookup Methods

Assuming a worker has a value of 45 percent:

- If the method is *Use Higher Limit*, the system determines that 60 is the first breakpoint higher than 45, and it will use 60.
- If the method is *Use Lower Limit*, the system determines that 40 is the first breakpoint lower than 45, and it will use 40.
- If the method is *Use Nearest Limit*, the system determines that 45 is closest to 40, and it will use 40. (If the worker's percent-in-range had been 55, the system would have used 60.)

When Outside Range

Use First Limit if Under Use this option if you want the system to consider the first breakpoint a match for all values lower than the first breakpoint. For example, if the worker had a percent-in-range of 20, the system would use 40 if this option were selected. If this option is deselected, the system will not find any matches for the input.

Use Last Limit if Over Use this option if you want the system to consider the last breakpoint a match for all values higher than the last breakpoint. For example, if the worker had a percent-in-range of 120, the system would use 100 if this option were selected. If this option is deselected, the system will not find any matches for the input.

Special Processing

Interpolate Result IDs Use this option if you want the system to calculate and return a numerical value that is proportional to the values tied to specific breakpoints.

Example Interpolating Result IDs

For this example, assume that you have a matrix with the same percent-in-range breakpoints and one output that is a rate.

Note. All values are percentages, unless noted otherwise.

Step	40	60	80	100
1	40	30	20	10
2	50	40	30	20
3	60	50	40	30
4	70	60	50	40

If you assume that the worker is on Step 1 and the Percent-in-Range (PIR) is 50, then the rate could be 40 or 30. However, if the Interpolate Result IDs option is selected, then the system would calculate the ratio of worker's value (50) to the lower limit (40), and use that ratio on the lower rate (40) and return a rate of 35. The worker's PIR of 50 is exactly between the breakpoints 40 and 60; therefore, the system calculates a rate exactly between the rates of 40 and 30.

If the PIR were 55 (75 percent of the numerical difference between 40 and 60), then the system would return 32.50 as the 75 percent rate value between 40 and 60.

Defining Matrix Output Information

Access the Outputs page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs).

Matrix DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:KUS001

Matrix Definition

First1 of 1Last

Effective Date:01/01/2000Status:Active

Description:Pos In Range Salary Increase

Matrix Type:Salary Increase Matrix

Matrix Outputs

First1-3 of 3Last

*Order:10

*Result ID:MINIMUM_PERCENTAGE

*Label:Min Percent

Type of Data:Number

Decimals:2

☐ Do not return Results

Valid Values

Outputs page

Note. Results that are available on this page will differ depending upon the matrix type.

Matrix Outputs (Result Columns)

- Order

Enter a numerical value that indicates the order in which the outputs should appear in the matrix.
- *Result ID

Select a value that the configurable matrix should return as an output. These values come from the Results ID table.
- *Label

Enter the label that will appear in the matrix.
- Type of Data

This display-only field indicates if the result ID has a character, number, or date format.
- Decimals

If the result ID has a number format, then you can enter the number of decimal places that you want to appear in the matrix.

Do not return Results

Select this check box if the result is to be used as a reference only for a calculation in another result. For example, if you have a PCNTOFBASE type result that uses BASERATE as its reference, then you can set this check box on the BASERATE result ID. The calling program will only receive PCNTOFBASE as an output result ID; it will not receive any other output from the matrix.

Note. You will see all defined result IDs on matrix displays, even though this check box may be selected for some results.

Valid Values

Select a table, a field, and, if appropriate, a setID to use to designate a list of values for an output column. The system uses the record and field designations as an edit table for the output values.

Defining Search Keys for Configurable Matrices

Access the Search Keys page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys).

Matrix DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:KUS001

Matrix DefinitionFirst1 of 1Last

Effective Date:01/01/2000Status:Active

Description:Pos In Range Salary Increase

Matrix Type:Salary Increase Matrix

*Enter Keys for:Perf RatingSelect Values From Prompt Table

Search Key SeriesCustomizeFindView AllFirst1-4 of 4Last

*Search Key (Character)	*Order	WildCard		
1	1		+	-
2	2		+	-
3	3		+	-
4	4		+	-

Generate Key Combinations

Search Keys page

Use this page to enter the key values against which worker data is matched. In the previous example, the system checked for worker's performance ratings to be 1, 2, 3, or 4.

Note. For market pay matrices, you are allowed to create the matrix without specifying any search keys and output data values, which is useful when you intend to load data into the matrix from a flat file. In this case, you define the matrix, but you do not specify search keys and output data. You can still update the status to Active. Then, you can load data into it from a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you will receive a warning.

For more options, review the sections about market pay matrices for an explanation of how to load data into a matrix.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Market Pay."

Matrix Definition

***Enter Keys for:** Select the input for which you will enter search keys. These values come from the Inputs page. You must enter at least one search key for each input (except for market pay matrices). In the previous example, after you entered keys for performance ratings, you would switch to *Percent-In-Range* and enter keys for that input.

Select Values From Prompt Table If you defined the Table and Field in the Optional Prompting group box for the selected input, you can click this link to access the Load Configurable Matrix Keys search page, which lists the values from that table. This link is not available if the input has a key type of Range.

Search Key Series

***Search Key (Character)** Enter a value, which will be the key value against which worker data is matched. For example, you would enter rows with key values 1, 2, 3, 4 for the input *Performance Rating*. You would enter key values 40, 60, 80, and 100 for the input *Percent-in-Range*.

Order Enter a numeric value that indicates the order in which the search keys will appear in the matrix. This field only applies to keys of type Character. Numeric and Date values have an implicit order and do not use this field for display order.

Wildcard Select if the system should use the search key as a wildcard. That is, if the worker's data did not match any other key, then the system will use this row as a match. For example, assume that four departments are listed in the matrix as keys 101, 102, 103, and 104. If you wanted all workers in all other departments to be handled separately, then you would enter a fifth key for Dept and make it a wildcard.

You can set a wildcard only if the key type is set to Match. Wildcards do not apply for key type of Range.

Generate Key Combinations

After you have completed entering keys for all inputs, click this button to generate the key combinations for the configurable matrix. The system automatically takes you to the Data Content page, where you can enter values for each result ID for different input combinations.

Example: Generating Key Combinations

For example, if you had one input as Dept with values 101, 102, 103, and 104, and another input of Job Risk with values of High, Med, or Low and a single output of Rate, then the system would generate the following table of combinations automatically:


Dept	Risk	Rate
101	Low	0
101	Med	0
101	High	0
102	Low	0
102	Med	0
102	High	0
103	Low	0
103	Med	0
103	High	0
104	Low	0
104	Med	0
104	High	0


Now you can enter the rates, and you do not need to manually enter Dept IDs or Risk levels.

Loading Values from the Prompt Table

Access the Load Configurable Matrix Keys page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys). Click the Select Values from Prompt Table link.

Load Configurable Matrix Keys

Prompt Table: 

Prompt Field: 

Prompt Set ID:

Select Key Values To Load		
Select	Search Key Value	Description
<input type="checkbox"/>	110000	Accountant
<input type="checkbox"/>	120000	Administrator
<input type="checkbox"/>	120005	Administrator Customer Service
<input type="checkbox"/>	120010	Administrator-Human Resources
<input type="checkbox"/>	120020	Administrator-Network Services
<input type="checkbox"/>	130020	Agent-HR Help Desk L1
<input type="checkbox"/>	130025	Agent-HR Help Desk L2
<input type="checkbox"/>	130030	Agent-HR Help Desk L3
<input type="checkbox"/>	140005	Analyst-Budget
<input type="checkbox"/>	140010	Analyst-Budget I
<input type="checkbox"/>	140015	Analyst-Budget II

Load Configurable Matrix Keys page

To load values from a specific prompt table:

1. Select a value in the Prompt Table field.
2. Select a value in the Prompt Field field.
3. Click the Search button.
4. In the Select Key Values To Load grid, select the check boxes for the values you want to load.
5. Click OK.

Entering Data Content Fields

Access the Data Content page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content).

Matrix Definition

Inputs

Outputs

Search Keys

Data Content

View

Matrix Name: KUS001

Matrix Definition

First 1 of 1 Last

Effective Date: 01/01/2000 **Status:** Active
Description: Pos In Range Salary Increase
Matrix Type: Salary Increase Matrix

Matrix Data

Customize | Find | View All | First 1-16 of 16 Last

Perf Rating	Pos in Range	Default	Min Percent	Default Percent	Max Percentage		
1	40.00	<input type="checkbox"/>	6.00	6.50	7.00	+	-
1	60.00	<input type="checkbox"/>	5.00	6.00	7.00	+	-
1	80.00	<input type="checkbox"/>	4.00	5.00	6.00	+	-
1	100.00	<input type="checkbox"/>	3.00	4.00	5.00	+	-
2	40.00	<input type="checkbox"/>	5.00	5.50	6.00	+	-
2	60.00	<input type="checkbox"/>	4.00	5.00	6.00	+	-
2	80.00	<input type="checkbox"/>	3.00	4.00	5.00	+	-
2	100.00	<input type="checkbox"/>	2.00	3.00	4.00	+	-
3	40.00	<input checked="" type="checkbox"/>	4.00	5.00	5.00	+	-
3	60.00	<input type="checkbox"/>	3.00	4.00	5.00	+	-

Data Content page

This page lists the combinations of search keys for all inputs that the matrix will evaluate. For each combination, it lists all outputs fields. You can add the character, date, or numerical values of each output here. The columns that appear on this page vary depending on the fields you define on the Inputs page and Outputs page. The columns to the left of the Default check box are defined on the Inputs page. The columns to the right of the Default check box are defined on the Outputs page.

Note. All inputs appear to the left of the Default column, and all outputs appear to the right of the Default column.

Default

(Optional) Select the row that you want to use as default results if the system does not find a match between the worker data and any combination of input rows. In the previous example, you were able to choose a default for a worker who was above or below the 40 and 100 ranges or who did not have a performance rating.

A good practice is to select a default for a rate matrix that is attached to a rate code that is associated with a salary step.

Important! You can only select one row as a Default.

Viewing Matrix Results

Access the View page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View).

The screenshot shows the 'View' page for a matrix named KUS001. The page has a navigation bar with tabs: Matrix Definition, Inputs, Outputs, Search Keys, Data Content, and View. The 'Matrix Definition' tab is selected. Below the tabs, the matrix details are displayed: Matrix Name: KUS001, Effective Date: 01/01/2000, Status: Active, Description: Pos In Range Salary Increase, and Matrix Type: Salary Increase Matrix. There is a 'Display Saved Matrix' button and a note: '(This will display only the last saved version of the matrix)'. The page also shows pagination: First, 1 of 1, Last.

View page

After you enter all data content for outputs, you must save the matrix. You can view the matrix on this page only *after* you have saved it.

When you click the Display Saved Matrix button, the results that are generated are from the *last saved* version of the matrix.

Important! This page will display only the *last saved* version of the matrix.

Using Special Rules to Create Configurable Matrices

Special rules apply when you create rate matrices and salary increase guidelines matrices, and specific result ID values must exist in each type of matrix in order for the system to be able to process the matrix. Special rules are required because the components where these matrices are invoked will look for and process specific result IDs. If the correct result IDs do not exist, then the calling component will not know how to process the output.

Rate Matrix

This table lists the result IDs that must exist in a rate matrix that you plan to associate with a rate code. The list of expected result IDs is based on the rate code type:

Note. You do not need every result ID for each rate code type. You only need one of these result IDs for each.

Rate Code Type	Result ID
Flat Rate	<ul style="list-style-type: none"> NEW_AMOUNT PERCENT_TO_APPLY
Hourly Rate + Flat Amount	<ul style="list-style-type: none"> NEW_AMOUNT PERCENT_TO_APPLY
Hourly Rate	<ul style="list-style-type: none"> NEW_AMOUNT PERCENT_TO_APPLY INCREMENT_AMOUNT THRESHOLD
Percent	INCREMENT_PERCENT
Points	NEW_POINTS

If you create a rate matrix that uses calculations, such as result IDs with the type of PERCENT_TO_APPLY, INCREMENT_PERCENT, and so on, you must select the Do not return Results check box for all other result IDs. This selection is necessary because the system requires that a rate matrix attached to a rate code can have only one result ID returned.

Salary Increase Matrix Attached to a Group Budget

The result IDs in the matrix must match the rate code type. This table illustrates the result IDs that are allowed based on rate code type:

Rate Code Type	Allowed Combinations of Result IDs
Flat, Hourly, or Flat + Hourly	<p>The matrix must have one of the following three combinations of result IDs:</p> <ul style="list-style-type: none"> • DEFAULT_PERCENTAGE • MINIMUM_PERCENTAGE, DEFAULT_PERCENTAGE, MAXIMUM_PERCENTAGE • MINIMUM_PERCENTAGE, DEFAULT_PERCENTAGE, MAXIMUM_PERCENTAGE, AMOUNT
Percent	<p>The matrix must have one of the following two combinations of result IDs:</p> <ul style="list-style-type: none"> • DEFAULT_PERCENTAGE • MINIMUM_PERCENTAGE, DEFAULT_PERCENTAGE, MAXIMUM_PERCENTAGE
Points	<p>The matrix must have one of the following two combinations of result IDs:</p> <ul style="list-style-type: none"> • DEFAULT_POINTS • MINIMUM_POINTS, DEFAULT_POINTS, MAXIMUM_POINTS

When the salary increase matrix is attached to a group budget, the system always looks for the DEFAULT_PERCENTAGE, DEFAULT_AMOUNT, or DEFAULT_POINTS result ID, and it will use that result ID to calculate the budget or assign increases.

However, the system performs special processing when the matrix includes both DEFAULT_PERCENTAGE and AMOUNT result IDs. In this case, the AMOUNT result ID is treated like a lump sum increase amount. Since every row will have both a default percentage and an amount result, the system will first check to see if the value for AMOUNT is greater than 0. If the value is greater than 0, the system uses that value as a lump sum increase amount in the group budget. If the AMOUNT value is 0, then the system uses the value for DEFAULT_PERCENTAGE as a change percentage. This selection allows you to create a salary increase matrix that handles the cases for which a worker's compa-ratio or percent-in-range values are outside the standard guidelines.

This example illustrates a salary increase matrix that includes percent-in-range values that are outside the standard guidelines:

Perf Rating	0				50				100				1000			
	Min Pct	Dflt Pct	Max Pct	Lump Sum	Min Pct	Dflt Pct	Max Pct	Lump Sum	Min Pct	Dflt Pct	Max Pct	Lump Sum	Min Pct	Dflt Pct	Max Pct	Lump Sum

Perf Rati ng	0				50				100				1000			
1	0.00	0.00	0.00	20.0 0	6.00	6.50	7.00	0.00	5.00	5.50	7.00	0.00	0.00	0.00	0.00	6.00
2	0.00	0.00	0.00	18.0 0	5.00	5.50	6.00	0.00	4.00	5.00	6.00	0.00	0.00	0.00	0.00	4.00
3	0.00	0.00	0.00	16.0 0	4.50	5.00	5.50	0.00	4.50	4.50	5.00	0.00	0.00	0.00	0.00	2.00
4	0.00	0.00	0.00	6.00	3.00	3.50	4.00	0.00	3.00	3.50	4.00	0.00	0.00	0.00	0.00	0.00

Note that the matrix includes an explicit breakpoint with a Percent in Range (PIR) value of 0. This breakpoint is required to handle all workers whose PIR is negative, as compared to their salary range. A breakpoint with a value of 1000 also exists. This breakpoint is required to handle all workers whose PIR is greater than 100. The value 1000 is an arbitrarily high value chosen to ensure that all possible PIR values greater than 100 are captured.

Note how the LumpSum values are non-zero only for breakpoints 0 and 1000. All other breakpoints have LumpSum=0. This setting means that a worker whose PIR is between 0 and 100 will get increases based on the DEFAULT_PERCENTAGE guideline, while those whose PIR is outside the standard range (less than 0 or greater than 100) will get a flat amount increase based on the LumpSum AMOUNT guideline.

Copying Matrices

This section discusses how to copy matrices.

Page Used to Copy Configurable Matrices

Page Name	Definition Name	Navigation	Usage
Copy Matrix	WCS_LK_TBL_CLONE	Set Up HRMS, Common Definitions, Configurable Matrices, Copy Matrix	Copy matrices.

Copying Matrices

Access the Copy Matrix page (Set Up HRMS, Common Definitions, Configurable Matrices, Copy Matrix).

Copy Matrix

Copy From ...

Available Matrices

[Customize](#) | [Find](#) | [View All](#) | First 1-10 of 32 Last

Matrix Name	Matrix Type	Effective Date	Status	Description
<input type="radio"/> HXCMPMATRIX1	BASECOMP	01/01/1900	Active	QA Base Comp Matrix 1
<input type="radio"/> HXCMPMATRIX2	BASECOMP	01/01/1900	Active	QA Base Comp Matrix 2
<input type="radio"/> HXCMPMATRIX3	BASECOMP	01/01/1900	Active	QA Base Comp Matrix 3
<input type="radio"/> HXCMPMATRIX4	BASECOMP	01/01/1900	Active	QA Base Comp Matrix 4
<input type="radio"/> HXCMPMATRIX5	BASECOMP	01/01/1900	Active	QA BASE COMP MATRIX 5
<input type="radio"/> HXCMPMATRIX6	BASECOMP	01/01/2000	Active	QA Base Comp Matrix 6
<input type="radio"/> HXCMPMATRIX7	BASECOMP	01/01/2000	Active	QA Base Comp Matrix 7
<input type="radio"/> HXCMPMATRIX8	BASECOMP	01/01/2000	Active	QA Base Comp Matrix 8
<input type="radio"/> HXCMPMSS1	BASECOMP	01/01/1900	Active	Compensation MSS 1
<input type="radio"/> HXCMPMSS2	BASECOMP	01/01/1990	Active	Compensation MSS Position

Copy To ...

*Matrix Name:

*Effective Date:

*Status:

Description:

Matrix Components To Copy

☒ Copy Structure Only
 ☐ Copy Structure and Keys
 ☐ Copy Structure, Keys, and Data

Copy Matrix

Copy Matrix page

To copy a matrix:

1. Select the matrix that you want to copy from the Available Matrices grid.
2. In the Copy To group box, enter values in the Matrix Name, Effective Date, Status, and Description fields for the new matrix.

Note. The default status is *Inactive*, but you can change it to *Active*. However, if the source matrix is *Inactive*, then you cannot change the copy status to *Active*.

3. In the Matrix Components To Copy group box:
 - Select Copy Structure Only to include just matrix details, input and output definitions.
 - Select Copy Structure and Keys to include the structure plus all search key values for every input.
 - Select Copy Structure, Keys, and Data to clone the entire matrix.

4. Click the Copy Matrix button to create the copy.

You will get a confirmation message and then see a new link labeled "Edit New Matrix <<matrix name>>". Click this link to begin editing the new matrix.

Chapter 6

Reviewing Worker Performance History

This chapter lists common elements and discusses how to:

- View worker review information.
- Report on worker reviews.

Common Elements Used in This Chapter

Rating Model	<p>A set of codes representing the levels of performance that you assign when evaluating worker performance. The following is an example of a rating model:</p> <ul style="list-style-type: none">• 1 - Excellent• 2 - Good• 3 - Needs Improvement• 4 - Unacceptable <p>Set up more than one rating model if appropriate for evaluating different categories of workers.</p>
Rating Scale	<p>Also known as the Review Rating Scale, it provides a means of quantifying the overall results of a worker's review. The rating scale combines a list of competencies with a rating model and a method of calculating the worker's performance in each competency. The calculation method depends upon whether you are setting up an Average, Summation, or Review Band rating scale type.</p>
Scale Type	<p>The rating scale type determines the method of calculating a worker's performance in the competencies that you include in the rating scale. The system provides the following three rating scale types: Average, Summation, and Review Band.</p>

Viewing Worker Review Information

This section discusses how to:

- Access worker reviews.

- Access reviewer comments.
- Review worker goals.

Note. Worker reviews are conducted in the Employee Review business process.

Use the Employee Review pages to review detailed, historical information about salary reviews, performance reviews, or both.

Pages Used to Access Worker Reviews

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Review	EMPLOYEE_REVIEW_1	Workforce Development, Employee Review History, Review History, Employee Review	View worker reviews.
Review History - Reviewers	EMPLOYEE_REVIEW_2	Workforce Development, Employee Review History, Review History, Reviewers	Review the list of competencies included in the rating scale and appropriate review fields.
Reviewer Comments	EMP_RVW_RATING_SEC	Click the EE Review Rating Comment icon at the end of the grid row for the competency comments you want to review.	Review comments about an individual competency.
Review History - Comments	EMPLOYEE_REVIEW_3	Workforce Development, Employee Review History, Review History, Comments	Review comments about the overall review. The same reviewer can record comments related to reviews for different evaluation types.
Review History - Goals	EMPLOYEE_REVIEW_4	Workforce Development, Employee Review History, Review History, Goals	Review worker goals and objectives.

Accessing Worker Reviews

Access the Employee Review page (Workforce Development, Employee Review History, Review History, Employee Review).

Employee Review

Reviewers

Comments

Goals

Martina Griffiths

EMP

ID: KC0001

Empl Record: 0

Review Details

Find | View All | First 1 of 1 Last

Eff Date:

04/01/2000

Review Type:

Salary

From Date:

04/01/2000

To Date:

03/31/2001

Next Review Date:

04/01/2001

Business Unit:

CAN01

CAN01 BU for Canada

Department:

10000

Human Resources

Company:

GBI

Job Code:

800010

Secretary-Senior

Position:

19000017

Rating Scale:

HC1

Nursing Reviews

Scale Type:

Average A

Rating Model:

HC1

Nursing Reviews

Review Rating:

Japan

Review ID:

Doc Type:

Appl for Grade Advance Proc

Period Begin Date:

Period End Date:

Sal Plan:

KC01

Grade:

004

Step:

3

Supervisor Level:

Employee Review page

Review Details

Review Type	<p>Displays one of these values:</p> <ul style="list-style-type: none"> • <i>Both</i> (both a Salary and a Performance review) • <i>Empl Fdbc</i> (employee feedback) • <i>Initl Rtnng</i> (initial rating) • <i>Intrm Rtnng</i> (interim rating) • <i>Offcl Rtnng</i> (official rating) • <i>Performance</i> • <i>Salary</i> • <i>Self Assmt</i> (self assessment)
Total Review Points	The system displays the total review points from the Reviewers page if the rating scale type is Summation.
Total Review Amount, Total Review Percent, or Total Review Salary Points	Depending on the resolution of the rating scale rating points, the system calculates and displays one of these fields as the result of the review if the rating scale type is Summation.
Status	Displays the status of this review.
Loaded to Job	Selected if you loaded the changes to the Job record.

Viewing Fields on the Employee Review Page

Different fields appear in this section of the page, depending upon the rating scale type. The following table lists the visible fields for each rating scale type.

Average	Summation	Review Band
Rating Scale	Rating Scale	Rating Scale
Scale Type	Scale Type	Scale Type
Rating Model	Rating Model	Rating Model
Review Rating	Total Review Points	Resulting Review Band

<i>Average</i>	<i>Summation</i>	<i>Review Band</i>
NA	Total Review Amount	Final Review Band
NA	Total Review Salary Points	Status
NA	Total Review Percent	Loaded to Job
NA	Status	NA
NA	Loaded to Job	NA

Accessing Reviewer Comments

Access the Review History - Reviewers page (Workforce Development, Employee Review History, Review History, Reviewers).

Employee Review
Reviewers
Comments
Goals

Martina Griffiths EMP ID: KC0001 Empl Record: 0

Review Details Find | View All First 1 of 1 Last

Effective Date: 04/01/2000 Next Review Date: 04/01/2001
Business Unit: CAN01 CAN01 BU Salary Admin Plan: KC01
Grade: 004 Step: 3
Job Code: 800010 Sr Scrty

Reviewers Find | View All First 1 of 1 Last

Evaluation Type: Supervisor Reviewer ID: KC0031
Factor Weight: 100

Competencies

Competency	Description	Weight (%)	Rating	Short Desc	Comments	Rating
		0				

Total Percent: Weighted Average:

Weight (%): 100

Review History - Reviewers page

Note. Column order for grids may vary by implementation. All columns may not be visible.

Review Details

Plan/Grade/Step The system displays the worker's salary plan, grade, and step.

Reviewers

Factor Weight Displays the weighting percent for this reviewer. The total weight of all reviewers for a review date must be 100 percent.

Competencies

The following table lists the fields that are visible for each of the rating scale types:

Average	Summation	Review Band
Competency	Competency	Competency
Weight (%)	Rating	Rating
Rating	Points	Points
Total Percent	Total Review Points	Total Review Points
Weighted Average		

Competencies Field Definitions

Competency Displays the competencies that you defined for the rating scale on the Rating Scale table.

Description Displays the short description of the competency.

Weight (%) (For Average scale only.)
The system displays the weight percent. The total of weight percents equals 100 percent for the worker.

Rating Displays the review rating that you want to give the worker for this competency.

Points (For Summation and Review Band scales only.)
Displays the points for this competency.



Click the EE Review Rating Comment icon to access the Reviewer Comment page, where you can view comments about the review rating for this competency.

Total Percent

(For Average scale type only.)

The system enters the total of the competency weights.

Weighted Average

(For Average scale type only.)

Displays the sum of the competency ratings multiplied by their weight percents.

Total Review Points

(For Summation and Review Band scales only.)

Displays the total review points a reviewer assigned all of the competencies.

Review Totals

Weight (%)

Displays the total percent of reviews completed. For example, if Reviewer 1 has 50 percent weight and Reviewers 2 and 3 each have 25 percent weight, then this field will show 75 percent after Reviewers 1 and 2 have completed their reviews.

Total Review Points

(For Summation and Review Band scales.)

Displays the total review points for the reviews completed up to this point.

Review Result

The system multiplies the total review score for each reviewer by the reviewer weight (taken as a percentage) and adds these weighted review scores.

For Summation and Review Band scale types, the system enters this value on the Employee Review page.

Reviewing Employee Goals

Access the Review History - Goals page (Workforce Development, Employee Review History, Review History, Goals).

Employee Review

Reviewers

Comments

Goals

Martina Griffiths

EMP

ID: KC0001

Empl Record: 0

Review Details

Find | View All | First 1 of 1 Last

Effective Date: 04/01/2000

Next Review Date: 04/01/2001

Business Unit: CAN01 CAN01 BU

Salary Admin Plan: KC01

Grade: 004

Step: 3

Job Code: 800010 Sr Scrty

Goals

Nbr	Goal	Status
		Not Met

Review History - Goals page

Goals

- Nbr (number)

Displays the sequence number for the goals that you add.
- Goal

The system displays goals from the worker's career plan.
- Status

Displays the goal status (for example *Exceeded* or *Met*).

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Plan Careers and Successions, "Planning Careers," Creating Career Plans

Reporting on Worker Reviews

To generate the worker review report, use the Review Audit (RUN_PER008) component.

This section lists the pages used to run the Employee Review Audit report.

Page Used to Run the Employee Review Audit Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review Audit	RUNCTL_PER008	Workforce Development, Employee Review History, Review Audit	Run the Employee Review Audit report (PER008). This report lists the worker review data that appears in the Employee Review component.

Chapter 7

Budgeting and Planning Salary Increases

This chapter provides an overview of the Base Compensation budgeting and planning business process and discusses how to:

- Calculate base compensation budgets.
- View budget comparisons.
- Plan group salary increases.
- Load salary changes to compensation records.
- (MEX) Define the increase matrix method.

Understanding the Base Compensation Budgeting and Planning Business Process

The following list briefly outlines the steps in the base compensation budgeting and planning process. You can calculate budget values with or without using the request budget functionality.

To calculate base compensation budgets:

1. Create a group using group build pages.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

2. Set up base compensation and budgeting control tables.
3. Create a budget in the Create/Approve Budget component and select the budget type or action reason.
4. Load rate codes and select one of these methods for calculation:
 - Matrix
 - Amount
 - Percent
 - Points
 - Percent of Points
 - Add Percent

5. Calculate the new budget and view the results.
6. (Optional) Compare proposed budgets and make adjustments.
7. (Optional) Request approval from approving manager via workflow.
8. Approve a budget or go directly to the Assign Group Increases component without approving the budget first.
9. Establish a salary increase plan for workers in the group based on the budget.
10. Manually adjust increases for individual workers in the group.
11. Compare salary plan figures with budget figures.
12. Finalize and approve the salary increase plan.
13. Populate worker records with planned, approved increases.

See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Establishing Group Default Control Values for Base Compensation Budgets and Plans, page 39

Common Elements Used in This Chapter

Salary Increase Budget	A budget for increasing base compensation rates for specified pay components. The budget is defined by worker group and calculates increases equally for all group members who have the budgeted rate codes in their compensation packages.
Salary Increase Plan	A plan for manually increasing the salaries of individual workers in a group.
Requested	The base salary increase budget as it is defined and submitted for approval on the Create/Approve Group Budget pages.
Current	The system uses the current salary increase budget for variance calculations in Group Budgets.

Calculating Base Compensation Budgets

This section provides overviews of Base Compensation budgeting procedures and budget setup and configuration for group salary increases, lists common elements, and discusses how to:

- Set up a budget description.
- Define budget requests.
- Enter and calculate budget components.

- View budget details.

Understanding Base Compensation Budgeting Procedures

You have the following options when using the Group Increases pages, the Budget Calculation process, and the Budget Comparison Inquiry pages:

- You can calculate a budget using either online processing in the Group Increases component pages or the Budget Calculation batch process.

You want to use the batch process if your group is larger than 25 workers.

- If you create more than one budget for the same group and budget period, you can compare budgets during the approval process or skip the budget comparison steps.
- You can approve a budget on either the Create/Approve Group Budget - Budget Requested page or the Compare Group Budgets - Comparison page.

Complete these steps to establish a salary increase budget for a group:

1. Create a group using the group build pages.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions."

2. Set up salary plan control values for the group.
3. Assign a budget ID and describe the budget on the Create/Approve Group Budget - Budget Description page.

You can approve only one budget for a single group and budget period start date.

4. Define the effective date, sequence, action, and action reason for the budget increase on the Create/Approve Group Budget - Budget Requested page.

You can budget for different action or action reason combinations that take effect on different dates within the same budget. However, do not do this if the increases are administered by Anniversary Date.

5. Load rate codes to view all the rate codes for the group on the Create/Approve Group Budget - Budget Components page.
6. Enter salary increases by selecting a matrix or by entering an amount, a percent, and so on for each rate code, as needed, on the Create/Approve Group Budget - Budget Components page. You must save the page if you want to run the calculations that comprise the next step.
7. Calculate the requested and current budget amounts by clicking the Calculate button on either the Create/Approve Group Budget - Budget Components page or the Create/Approve Group Budget - Budget Requested page, or by running the Budget Calculations Application Engine process.

If your group is large, you will want to use the application engine process.

The system enters the calculated totals of the requested budget in the Requested and Current rows on the Create/Approve Group Budget - Budget Requested page.

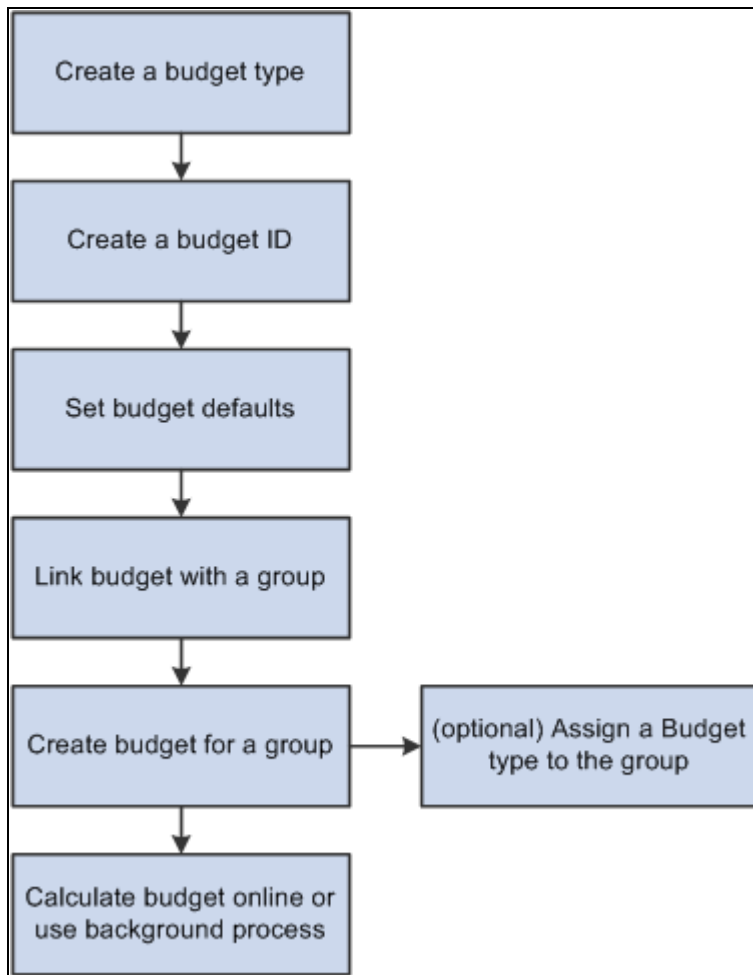
8. If you are not using the requested budget functionality, do not click the Request Approval button.

(Optional) Access the Create/Approve Group Budget - More Budget Details page and select the Total Current Annual Salaries, Approved Budget, and Allocation Amount check boxes. Click the Get Selected Values button to view the calculated budget values. You may also use the new additional fields for reserve amount, vacant position budget amount, and new position budget amount. Six user-defined fields are also provided.
9. If you are requesting a budget for approval, submit the budget for approval by clicking the Request Approval button on the Create/Approve Group Budget - Budget Requested page.
10. Compare budgets (if you created more than one budget for the same group and budget start date) on the Compare Group Budgets pages.
11. Approve the budget without modification by selecting the Budget Approved check box on the Compare Group Budgets - Comparison page.
12. Modify the current budget, approve it, or use it for salary planning without approving it.

To modify the budget, change the values in the Current Budget grid on the Create/Approve Group Budget - Budget Components page.
13. To approve the budget, enter dates, select the Approve the Budget check box, and then save.
14. Use the approved or unapproved budget as the basis for creating a salary increase plan.

Understanding Budget Setup and Configuration for Group Salary Increases

This diagram illustrates the process flow required to set up group budgets for group salary increases:



Budgeting setup process, including the required steps to set up group budgets for group salary increases

Common Elements Used in This Section

Budget Period and Level of Proration	Displays the control dates and the level of proration that you set up for the group in the Default Budget Parameters page.
Total Count	Displays the total count of workers in the group as of the salary plan start date.
Total FTE (full-time equivalent)	Displays the total number of FTEs for the group as of the salary plan start date.

Total Annual Salaries and Total Current Annual Salaries

The total sums of salaries for workers who meet the following criteria:

- They are in the group as of the salary plan start date.
- Their worker status is Active, Leave of Absence, Leave with Pay, or Suspended.
- They are eligible for an increase as of the salary plan start date.
- If you are using the All Employees at the Same Time increase method, the worker's hire date is before the New Hire Eligibility date that you defined on the Default Budget Parameters page.


Pages Used to Budget Group Increases

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create/Approve Group Budget - Budget Description	GROUP_INCR_BUDGET1	Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Description	Assign a Budget ID and describe a salary increase budget for a group of workers.
Create/Approve Group Budget - Budget Requested	GROUP_INCR_BUDGET2	Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Requested	Define the action and action reason for the budget and to view requested and current budget totals. Use this page to submit a budget for approval, to modify and approve the budget, and to approve the salary plan associated with the budget.
Create/Approve Group Budget - Budget Components	GROUP_INCR_BUDGET3	Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Components	Enter and calculate increases for group members by base pay rate codes. The system calculates the totals for the group and displays them on the Create/Approve Group Budget - Budget Requested page.
Create/Approve Group Budget - More Budget Details	GROUP_INCR_BUDGET6	Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, More Budget Details	View specific budget amounts based on groups and action and reasons combinations. Add more budget fields and create user-defined fields to store additional budget data.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Budget Calculation	RUNCTL_CALCIBUDGET	Compensation, Base Compensation, Group Budgets, Calculate Group Budget, Budget Calculation	<p>Run the Budget Calculation application engine process, which calculates the total budget amount and percent for the rate code increases that you enter on the Create/Approve Group Budget - Budget Components page.</p> <p>It enters the totals in the Requested and Current data rows on the Create/Approve Group Budget - Budget Requested page.</p> <p>You can calculate the budget using online processing if the group is small. For large groups, use this application engine process.</p> <p>Define a group increase budget before using this page.</p>

Setting Up a Budget Description

Access the Create/Approve Group Budget - Budget Description page (Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Description).

Budget Description		Budget Requested		Budget Components		More Budget Details	
Group ID:	KU001	KU001					
Budget							
Budget Start:	04/01/2000	End Date:	03/31/2001	Get Group			
Level of Proration:	Monthly						
Budget ID:	KU001-B1						
*Description:	<input type="text" value="KU001 - Budget 1"/>						
Short Description:	<input type="text" value="KU001-B1"/>						
Group Default Values							
Salary Planning Start Date:	04/01/2000						
New Hire Eligibility Date:	04/01/2000						
As of Salary Plan Start Date							
Total Count:	42	Total Annual Salaries:	1,675,644.04  USD				
Total FTE:	29.000000						

Create/Approve Group Budget - Budget Description page

You can set up a number of different budgets with distinct budget IDs for the same group in the same budget period. You can compare these budgets in the Compare Group Budgets pages.

Set up the group default values on the Default Budget Parameters page.

Retrieving Group Information

Get Group Click to retrieve or refresh the total count, FTE, and total annual salaries information for this group ID.

Group Default Values

Salary Planning Start Date Displays the Salary Planning Start Date that you set up for the group in the Assign Group Budget Parameters page.

New Hire Eligibility Date If you are administering salaries by the All Employees at the Same Time method, displays the new hire eligibility date that you set up for the group in the Assign Group Budget Parameters page.

Defining Budget Requests

Access the Create/Approve Group Budget - Budget Requested page (Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Requested).

Budget Description		Budget Requested		Budget Components		More Budget Details	
Group ID:	KU001	KU001					
Budget Period:	04/01/2000	Budget End Date:	03/31/2001			<button>Calculate</button>	
Budget ID:	KU001-B1	Level of Proration:	Monthly				
<div>Budget</div> <div>Find View All First 1 of 1 Last</div>							
*Effective Date:	04/01/2000	Sequence:	0			<button>Request Approval</button> + -	
Budget Type:							
*Action:	Pay Rt Chg	Reason:	MER	Merit			
Budget Manager:		Record:	0				
		Percent	Amount	Date	<input checked="" type="checkbox"/> Budget Approved		
Requested:	2.99	143,811.043	04/01/2000	Grand Totals			
Current:	2.99	143,811.043	04/01/2000	Amt:	143,811.043000		
Planned Increases:	2.99	4,174.04	04/01/2000	%:	2.99		
Variance:				<input checked="" type="checkbox"/> Salary Plan Approved			
As of Salary Plan Start Date							
Total Count:	42	Total Annual Salaries:	1,675,644.04 USD				
Total FTE:	29.000000						

Create/Approve Group Budget - Budget Requested page

Effective Date

Select an effective date for the action and action reason associated with this budget. This is the effective date which will ultimately be loaded into Job Data.

The effective date enables you to budget for different action and action reason combinations that take effect on different dates within the same budget.

By using the Seq (sequence number), Effective Date, Action, and Reason fields, you can perform multiple actions on the same rate code for the same effective date and different action reasons.

Note. If you administer salary increases by Employee Anniversary Date under the plan, you can only define one increase in the budget, which must have the salary plan start date as the effective date.

Sequence

If you enter an additional action with the same effective date and different action reason, increase the sequence number by one integer. The system assumes the first action to have a sequence number of 0; therefore, enter a sequence number of 1 for your second use of the an action code and action reason for the same effective date.

You may have the same effective dates for pay rate changes for merit and promotions, and other types, using specific effective sequences.

Budget Type

Select a budget type from the available values. The values come from the Define Budgets page. The default value for this field appears.

Action	Select from these values associated with this budget: <i>Demotion</i> , <i>Pay Rt Chg</i> (pay rate change), <i>Posn,Chg</i> (position change), and <i>Promotion</i> . The default value for this field appears.
Reason	Select from the list of action reason code values established in the Action Reason Code table.
Budget Manager	The default value is the Manager ID defined for the group when the group was defined. You can override this ID if necessary. When you enter the manager ID, the system automatically updates the Rcd#(record number) field with the manager's worker record number.
Rcd#	The system enters the worker record number of the budget manager you identified.
Calculate	<p>After you enter or change rate codes and increase values in the Requested Budget or Current Budget grids on the Create/Approve Group Budget - Budget Components page, click Calculate to calculate the budget and populate the Current, Requested, Planned Increase and Variance Percent, and Amount fields on this page.</p> <p>The system calculates the total for the group based on the following data:</p> <ul style="list-style-type: none"> Increases in workers' compensation rate codes that you enter in the Create/Approve Group Budget - Budget Components page. Budget period parameters that you define for the budget. <hr/> <p>Note. Only the budget manager is allowed to cancel a budget approval. If you modify a budget that was already approved, you will have to recalculate the budget and then request a new approval. You cannot save the page unless a recalculation is done and a new approval is requested. You cannot modify a budget that has salary increases already loaded to JOB since a modification would change the status in Summarize and Approve Raises to <i>Processed</i>. If a budget is modified, the status will automatically be set to <i>Proposed</i>, even if the status was previously <i>Approved</i>.</p> <hr/>
Request Approval	(Optional) Click this button to send a workflow notifying the approval manager to review the budget. Workflow must be enabled.

Percent

Displays the total percent change in salaries.

Requested Percent = Requested Amount - Total Annual⇒
Salaries prorated to the level of proration / Total⇒
Annual Salaries prorated to the level of proration x 100

Current Percent = Current Amount - Total Annual Salaries⇒
prorated to the level of proration / Total Annual⇒
Salaries prorated to the level of proration x 100

Planned Increase Percent = Planned Increase Amount / Total⇒
Annual Salaries prorated to the level of proration x 100

Variance Percent = Variance Amount / Total Annual Salaries⇒
prorated to the level of proration x 100

Note. Before doing this subtraction and division, Requested Amount and Current Amount values (prorated to level of proration) must be converted to an annual amount.

Amount

Displays the change in total salaries. These calculations include all base pay rate codes in each Job compensation package as well as any new percentage or salary points calculations resulting from the planned increase.

Requested Amount = Sum of requested salaries prorated to⇒
the level of proration

Current Amount = Sum of current salaries prorated to the⇒
level of proration

Planned Increase Amount = Current Amount - Total Annual⇒
Salaries prorated to the level of proration

Variance Amount = Current Amount - Requested Amount

Date

Enter the date that you are requesting this budget (in the Requested row) or approving the budget (in the Current row) or approving the salary plan (in the Planned Increases row).

The system enters this date if you approve the budget on the Compare Group Budgets - Comparison page.

Requested

This information represents the amount being requested for salary increases.

Current

This information represents the budget as revised by the approver on the Create/Approve Group Budget - Budget Components page. This amount is available for distribution to group members on the Propose Raises page.

Planned Increases

This information represents the total increases that you define in the salary increase plan associated with this budget. All amounts appear in the budget currency and frequency.

Budget Approved	<p>The approval manager first enters the date in the Current budget row and then selects the Budget Approved check box when satisfied with all of the budget figures.</p> <p>The system selects this check box if you approve a budget on the Compare Group Budgets - Comparison page.</p> <p>Only one approved budget can exist at one time for a single group and budget period start date.</p> <p>Only the budget manager can cancel a budget approval by deselecting this check box. Then, the Requested Budget and Current Budget grids on the Create/Approve Group Budget - Budget Components page will become available for edit.</p>
Grand Totals	The total amount requested for the budget.
Amt (amount)	The system enters the total increases according to the current budget, calculated and displayed at the level of proration defined for the budget.
% (percent)	The system enters the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the current budget.
Variance	<p>After you create a salary increase plan associated with this budget, displays the variance between the Requested Amount and Current Amount.</p> <p>If the variance displays as a positive amount, the salary plan exceeds the budgeted amount. If the variance displays as a negative amount, the planned salaries fall short of the budgeted amount.</p>
Salary Plan Approved	The approval manager selects this check box to approve the plan. It must be selected to load the salary increases to Job Data.

See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Understanding Salary Increase Budgeting and Planning, page 35

Entering and Calculating Budget Components

Access the Create/Approve Group Budget - Budget Components page (Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Components).

Budget Description		Budget Requested		Budget Components		More Budget Details	
Group ID:	KU001	KU001					
Budget Start:	04/01/2000	End Date:		03/31/2001			
Budget ID:	KU001-B1	Level of Proration:		Monthly		<input type="button" value="Calculate"/>	
Budget Find View All First 1 of 1 Last							
Effective Date:	04/01/2000	Sequence:		0			
Budget Type:							
Action:	Pay Rt Chg	Reason:		Merit			
Budget Manager:		Record:		0			
<input type="button" value="Load Rate Codes"/>							
Requested Budget							
<input type="button" value="Amounts"/> <input type="button" value="Changes"/> <input type="button" value="Details"/>							
Rate Code	Description	Total Increase		Currency	Frequency		
NAHRLY	Default NA	24.08		USD	H	<input type="button" value="+"/> <input type="button" value="-"/>	
Current Budget							
<input type="button" value="Amounts"/> <input type="button" value="Changes"/> <input type="button" value="Details"/>							
Rate Code	Description	Total Increase		Currency	Frequency		
NAHRLY	Default NA	24.08		USD	H	<input type="button" value="+"/> <input type="button" value="-"/>	

Create/Approve Group Budget - Budget Components page: Amounts tab (1 of 2)

Requested Budget							
<input type="button" value="Amounts"/> <input type="button" value="Changes"/> <input type="button" value="Details"/>							
Rate Code	Matrix Name	Details	Change Amount	Change Percent	Change Points	Percent of Points	Add Percent
NAHRLY		Details		5.00			<input type="button" value="+"/> <input type="button" value="-"/>
Current Budget							
<input type="button" value="Amounts"/> <input type="button" value="Changes"/> <input type="button" value="Details"/>							
Rate Code	Matrix Name	Details	Change Amount	Change Percent	Change Points	Percent of Points	Add Percent
NAHRLY		Details		5.00			<input type="button" value="+"/> <input type="button" value="-"/>

Create/Approve Group Budget - Budget Components page: Changes tab (2 of 2)

Common Page Information

Sequence

Select a budget by sequence if more than one budget, budget period, budget ID, effective date, and action and action reason is available for this group.

Action	Select a budget by action if more than one budget, budget period, budget ID, and effective date is available for this group.
Reason	Select a budget by action and reason if more than one budget, budget period, budget ID, effective date, and action is available for this group.
Calculate	<p>After entering or adjusting the details of the requested budget or current budget by rate code in the grids, click Calculate to calculate the budget totals. The system updates both the Current budget totals and the Requested budget totals on the Create/Approve Group Budget - Budget Requested page.</p> <p>If you have a large group, use the Budget Calculation application engine process instead of this button.</p>
Load Rate Codes	Click this button so that the system populates default values for all rate codes for group members as shown on their Job Data records.

Amounts Tab

When the budget is approved, this grid is not accessible. You are not able to insert or delete rows, and you cannot modify any value in the grid.

Note. If you modify a budget that was already approved, you need to recalculate the budget. You cannot save the page unless a recalculation is done. It is not possible to modify a budget that has salary increases already loaded to JOB since these increases change the status in the Propose and Summarize Raises page to Processed. If a budget is modified, the status will automatically be set to Proposed, even if the status was previously Approved.

Rate Code	Select a base pay rate code for which you want to budget an increase. The system calculates the budget for all workers in the group who have this rate code in their compensation package.
Total Increase	Displays the result of the calculation for all workers in the group who have the rate code in their compensation packages. It shows the total increase amount for the rate code, in the currency and frequency of the rate code. For example, suppose there are five workers in the group who have the rate code and you increase the amount by 100 USD, the amount in this field is 500 USD (5 × 100).
Currency and Frequency	Display the currency and frequency that you defined for the rate code on the Comp Rate Code Table page.
Frequency	Select the frequency for the rate code. Values come from the Frequency ID table.

Changes Tab

The fields on this tab are unavailable if a salary matrix is associated with any rate code on the Amounts tab.

Matrix Name	<p>Select a salary matrix if you want to calculate a budget using a salary matrix.</p> <p>You can enter an existing salary increase matrix name that was created using a configurable matrix. Based on the criteria of this configurable matrix, the system will then apply the appropriate increase to workers in the group when calculating the budget. Examples of criteria are performance ratings, compa-ratio, or position in range.</p> <p>PeopleSoft provides sample salary increase matrices. If you populate a matrix name, do not enter values in the Change Amount or Change Percent fields. When you select a salary increase matrix name, the Details link becomes active. Click the Details link if you want to go to the matrix definition, including its current data content. The system will display the relevant values that will be used during budget calculation.</p> <hr/> <p>Note. If you are using performance review as an input, the review rating must be of PERFRATING type.</p> <hr/>
Change Amount	<p>If the rate code type is Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount, you can enter a change amount for the rate code. The system calculates the budget by adding this new amount to the compensation for the rate code.</p> <p>If you enter a Change Amount value, the Change Percent field is deselected.</p>
Change Percent	<p>If the rate code type is Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount, you can enter a percent of increase in the amount for the rate code. The system calculates the budget by adding this percent increase to the compensation for the rate code.</p> <p>If you enter a Change Percent value, the Change Amount field is deselected.</p>
Change Points	<p>If the rate code type is Points, you can enter an additional number of points for the rate code. The system calculates the budget by adding this number of points to the points for the rate code and multiplying by the point value that you define on the Comp Rate Code Table page.</p> <p>If you enter a Change Points value, the Percent of Points field is deselected.</p>
Percent of Points	<p>If the rate code type is Points, you can enter a percent of increase in the number of points for the rate code. The system calculates the budget by adding this percent increase to the points for the rate code and multiplying by the point value that you define in the Company Table.</p> <p>If you enter a Percent of Points value, the Change Points field is deselected.</p>
Add Percent	<p>If the rate code type is Percent, you can enter an additional percent for the rate code. The system calculates the budget by adding this percent to the existing rate code percent.</p>

Current Budget Amounts and Changes

As you enter the Requested Budget details, the system copies them into the Current Budget grid. The approval manager can adjust the budget in the Current Budget grid. When you click Calculate or run the Budget Calculation process, the system calculates and enters the adjusted totals in the Current row on the Create/Approve Group Budget - Budget Requested page.

When the budget is approved, this grid is not accessible. You are not able to insert or delete rows, and you cannot modify any value in the grid.

The fields in this section are identical to the fields on the Amounts and Changes tabs in the Requested Budget section.

Viewing Budget Details

Access the Create/Approve Group Budget - More Budget Details page (Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, More Budget Details).

Budget Description	Budget Requested	Budget Components	More Budget Details
Group ID:	KU001	KU001	
Budget Start:	04/01/2000	Budget End Date:	03/31/2001
Budget ID:	KU001-B1	Level of Proration:	Monthly
<div>Budget Find View All First 1 of 1 Last</div>			
Effective Date:	04/01/2000	Sequence:	0
Budget Type:			
Action:	Pay Rt Chg	Reason:	Merit
Budget Manager:		Record:	0
<div> <div>Calculated Values</div> <div> <input type="checkbox"/> Total Current Annual Salaries: <input type="text" value="0.000"/> </div> <div> <input type="checkbox"/> Approved Budget: <input type="text" value="0.000"/> </div> <div> <input type="checkbox"/> Allocation Amount: <input type="text" value="0.000"/> </div> <div>Get Selected Values</div> </div>			
<div> <div>Customizable Values</div> <div> <div>Reserve Amount:</div> <div><input type="text"/></div> </div> <div> <div>Vacant Position Budget Amount:</div> <div><input type="text"/></div> </div> <div> <div>New Position Budget Amount:</div> <div><input type="text"/></div> </div> <div> <div>User Defined 1:</div> <div><input type="text"/></div> </div> <div> <div>User Defined 2:</div> <div><input type="text"/></div> </div> <div> <div>User Defined 3:</div> <div><input type="text"/></div> </div> <div> <div>User Defined 4:</div> <div><input type="text"/></div> </div> <div> <div>User Defined 5:</div> <div><input type="text"/></div> </div> <div> <div>User Defined 6:</div> <div><input type="text"/></div> </div> </div>			

Create/Approve Group Budget - More Budget Details page

Calculated Values

Approved Budget	The budget as revised by the approver on the Create/Approve Group Budget - Budget Components page. This amount is available for distribution to group members on the Propose Raises page.
Allocation Amount	The total increase that you define in the salary increase plan associated with this budget. The amount appears in the budget currency and frequency.

Customizable Values

Reserve Amount	Use this field to store budget amounts to be saved for allocation at a later time.
Vacant Position Budget Amount	Stores budget amounts for vacant positions.
New Position Budget Amount	Stores budget amounts for new positions.
User Defined Budget Amounts	Store additional budget values in these fields to have all budget values in one place and to use for reports.

Viewing Budget Comparisons

This section discuss how to use the Budget Comparison Inquiry pages to:

- View proposed budgets.
- View budget variances.
- Approve a budget.

Pages Used to View Budget Comparisons

Page Name	Definition Name	Navigation	Usage
Compare Group Budgets - Budgets	BUDGET_COMPAR3_INQ	Compensation, Base Compensation, Group Budgets, Compare Group Budgets, Budgets	View a list of proposed budgets for the specified group ID and budget period start date. Displays the description of each budget along with its effective date and sequence.

Page Name	Definition Name	Navigation	Usage
Compare Group Budgets - Comparison	BUDGET_COMPAR1_INQ	Compensation, Base Compensation, Group Budgets, Compare Group Budgets, Comparison	View the requested amount and requested percent variance between one budget and all others that you selected on the Compare Group Budgets - Budgets page.
Compare Group Budgets - Components	BUDGET_COMPAR2_INQ	Compensation, Base Compensation, Group Budgets, Compare Group Budgets, Components	View budget details by rate code associated with the budget selected in the Variance check box on the Compare Group Budgets - Comparison page.

Viewing Proposed Budgets

Access the Compare Group Budgets - Budgets page (Compensation, Base Compensation, Group Budgets, Compare Group Budgets, Budgets).

Budgets Comparison Components

Group ID: HXECOMP2 e-Comp Group 2 Compare

Budget Period Start Date: 01/01/2001

Budget Comparison	Budget ID	Short Descr	Effective Date	Seq	Action	Reason
<input checked="" type="checkbox"/>	HXECOMPID	HXECID	01/01/2001	0	Promotion	Norm Prog

Compare Group Budgets - Budgets page

This page displays the budget description of each budget that you created for the specified group ID and budget period start date. Its fields are the same as those found on the Create/Approve Group Budget - Budget Requested page.

Note. Set up more than one group increase budget for the group ID and budget period start date before using this page.

Compare

Click this button to load the selected budgets into the Compare Group Budget - Comparison page.

Budget ID

Select the check box that precedes the budget ID for each budget that you want to compare with other budgets on the next page in the component.

Viewing Budget Variances

Access the Compare Group Budgets - Comparison page (Compensation, Base Compensation, Group Budgets, Compare Group Budgets, Comparison).

Requested Budgets										
Budget ID	Effective Date	Seq	Action	Reason	Requested Amount	Requested Pct	Variance	Amount Variance	Budget Approved	Budget Approval Date
		0					<input type="checkbox"/>		<input type="checkbox"/>	

Compare Group Budgets - Comparison page

Displays the budgets that you selected on the Compare Group Budgets - Budgets page.

- | | |
|------------------------|--|
| Variance | Select for the budget that you want to compare to the other budgets in the page. |
| Amount Variance | Displays the amount that each budget varies from the budget that you selected in the Variance field. |
| Budget Approved | <p>Select to approve a budget on this page. You must also enter a date in the Budget Approval Date field.</p> <p>You can approve only one budget for a group ID and budget period start date.</p> <ul style="list-style-type: none"> Once you approve a budget increase for one budget, the Budget Approved check boxes for any other budget are unavailable for entry. You can approve a budget increase only if all increases with prior effective date and sequence in the budget are already approved. <p>When you approve a budget on this page, the system updates the Budget Approved field on the Create/Approve Group Budget - Budget Requested page.</p> |

Approving a Budget

The system performs the following checks to ensure that only one budget ID is approved for a single group ID and budget period start date:

- When you select either Budget Approved or Salary Plan Approved for any increase with effective date and effective sequence within a group budget, the system will make sure that no other budget ID for the same group has been approved.
- When you select either Budget Approved or Salary Plan Approved for any increase with effective date and effective sequence within a group budget, the system will make sure that the increases within the budget that have a previous effective date or sequence have already been approved. This action occurs because each subsequent effective date or sequence budget calculation is performed based on previous budgeted increments.

You can use a budget for a salary increase plan without approving the budget first. However, before you can run a process to load the salary changes to the Job Data records, the following approvals must be completed:

- Salary Plan Approved must be selected on the Create/Approve Group Budget - Budget Requested page.
- The individual worker increases must be marked Approved on the Summarize and Approve Raises page.

Planning Group Salary Increases

This section provides an overview of salary increase planning and discusses how to:

- Calculate group increases.
- Apply group increases.
- View the salary plan summary.
- View budget information.

Understanding Salary Increase Planning

Use the Group Increases components located under Compensation, Base Compensation, Group Increases and the Group Budgets components under Compensation, Base Compensation, Group Budgets to create salary increase plans by group. The system loads the group members and their default, budgeted increases into the page, where you can view them individually. In addition to details of the worker's compensation package by rate code, the pages provide information about the worker's compa-ratio, percent in range, last increase date, salary history, and review results. This information helps you make decisions about adjusting the budgeted increase for individual workers without looking elsewhere in the system.

Complete these steps to use the Group Increases and Group Budgets components to create salary increase plans:

1. Create a group, define salary plan controls, and establish a group increase budget.
2. Run the Salary Plan Calculation process to apply the budgeted increases to the compensation packages of workers in the group.

For small groups, use online processing instead of the batch process. To use online processing, click the Calculate button after accessing the Propose Raises page.

3. Adjust budgeted increases at the individual level by rate code on the Propose Raises page.

After making changes, click the Refresh button on the Summarize and Approve Raises page to update the current budget on the Create/Approve Group Budget - Budget Requested page.

4. View summary information on the Summarize and Approve Raises page.
5. Approve worker raises on the Summarize and Approve Raises page.

Approve all raises by clicking the Approve All button. Alternatively, you can approve or deny raises by changing the status of each worker individually.

6. Approve the Salary Plan on the Create/Approve Group Budget - Budget Requested page.

Integrating Worker Reviews and Salary Increase Plans

If you use salary increase guideline matrices that are associated with a salary plan, the system calculates whether the new salary figure is under, over, or meets increase guidelines established for the review rating and percent in range.

Calculating Salary Increases Based on the Budget

The system calculates worker increases using either of the following methods:

- The Salary Plan Calculation application engine process.
- Online processing on the Propose Raises page.

If you are using a salary increase matrix created as a configurable matrix to calculate the budget, then the system uses the criteria on the Data Content page to apply increases to each worker.

Pages Used to Plan Group Salary Increases

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Calculate Group Increases	RUNCTL_SALPLNGRP	Compensation, Base Compensation, Group Increases, Calculate Group Increases, Calculate Group Increases	Run the Salary Plan Calculation application engine process. This process is recommended for calculating large groups.
Propose Raises	SALARY_PLAN_GRP	Compensation, Base Compensation, Group Increases, Assign Group Increases, Propose Raises	Apply the group increase budget to the pay components of the workers in the group. You can manually enter pay components and modify salary increases for workers in the group.
Summarize and Approve Raises	SAL_PLAN_GRP_APPR	Compensation, Base Compensation, Group Increases, Assign Group Increases, Summarize and Approve Raises	Show the totals by effective date, effective sequence, action, and action reason as well as the overall grand totals of your planned salary increases.
Budget Information	SAL_PLAN_GRP_BDGT	Compensation, Base Compensation, Group Increases, Assign Group Increases, Budget Information	Display budget information.

Calculating Group Increases

Access the Calculate Group Increases page (Compensation, Base Compensation, Group Increases, Calculate Group Increases, Calculate Group Increases).

Calculate Group Increases

Run Control ID: emprefresh

[Report Manager](#)[Process Monitor](#)

Run

Report Request Parameter(s)

Group ID:

H0GRP1

H0GRP1 for Reports

Budget Period Start Date:

06/24/2009

Budget ID:

☐ Approve All

Calculate Group Increases page

Use this page to calculate budgets for large groups of workers.

Approve All Increases? When you select this check box, the system enters the status of *Approve* in the Status field on the Summarize and Approve Raises page for each member of this group. To set the status for group members individually on the Summarize and Approve Raises page, do not select this check box.

Applying Group Increases

Access the Propose Raises page (Compensation, Base Compensation, Group Increases, Assign Group Increases, Propose Raises).

Propose Raises Summarize and Approve Raises Budget Information

Group ID: HXECOMP2 Group 2 Budget ID: HXECOMPID HXECID

Budget Period: 01/01/2001 - 12/31/2001 Salary Planning Start Date: 01/01/2001 By Budget: BU

1 to 14 of 14 Total in Group: 14 Calculate Get Group

Propose Raises Find | View All First 1 of 14 Last

Kelsey MacGregor Employee ID: HXEC01 Employment Record: 0

*Effective Date: 01/01/2001 Effective Sequence: 0

*Action: PRO Promotion Reason: NCP Norm Prog

New Compensation Rate: 1,458.33 USD New Percent through Range: -174.3

New Annual Rate: 17,500.00 USD Months Since Last Increase: 12.0

Change Amount: 0.00 Annual Increase Percent: 0.0

Change Percent: 0.000 New Compa Ratio: 0.00

Compensation Frequency: Monthly

Pay Components

Amounts Changes Conversion

Rate Code	Seq	Details	New Comp Rate	New Currency	New Frequency	New Points	New Percent	New Rate Code Group
HXFLT1	0	Details	35,000.00	USD	A			

Employee Review Rating

Document Type: Calculation Method:

Begin Date: End Date:

Rating Model: Review Rating:

Min %: 0.0 Max %: 0.0 Status:

Employee Salary History

Rates Salary Grade

Job EffDt	Job EffSeq	Action	Reason	Comp Rate	Currency	Frequency	Change Percent	Change Amount
01/01/2000		HIR	NPS	1,458.333334	USD	M	0.000	0.000000

Propose Raises page (1 of 4)

Pay Components

Amounts Changes Conversion

Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent
HXFLT1	0		USD	Annual		

Propose Raises page - Changes tab (2 of 4)

Pay Components									
Amounts		Changes		Conversion					
Rate Code	Seq	Source	Default Without Override		Apply FTE	Convert Comprt	Currency	Frequency	
HXFLT1	0	Manual	<input type="checkbox"/>		<input checked="" type="checkbox"/>	1,458.333334	USD	Monthly	<input type="button" value="+"/> <input type="button" value="-"/>

Propose Raises page - Conversion tab (3 of 4)

Employee Salary History						
Rates		Salary Grade				
Job EffDt	Job EffSeq	Salary Set ID	Sal Plan	Grade	Comp-Ratio	Month Last Incr
01/01/2000		HXSID	HXA1	001	0.58	

Propose Raises page - Salary Grade tab (4 of 4)

You must create a group increase budget for the worker's group before using this page.

Note. This process is recommended for calculating small groups.

Identifying the Budget

Start Dt (start date) Displays the salary planning start date that you associated with this budget ID on the Create/Approve Group Budget - Budget Description page.

Request Load If you have workflow enabled, click this button after you have made all manual changes on this page and are ready to approve the salary plan and load the salary increases to the worker Job Data records. When you click this button, the system sends a worklist entry to the Personnel Administrator, who can then perform any necessary approvals and run the process to load the salary changes to Job.
This button is hidden if you do not enable workflow.

Calculate Click to calculate and load the default budgeted increases for group members. Do not click this button if you use the Salary Plan Calculation process before accessing this page.

Note. Do not click this button after adjusting worker raises on this page unless you want to return to the budgeted increases without any modifications.

Get Group	<p>Click to load the group into the page and to make sure the workers displayed in the page are currently eligible group members.</p> <p>The system also updates the Total Annual Salaries on the Summarize and Approve Raises page when you click this button, because a change in the group affects the group's totals.</p> <hr/> <p>Note. When you refresh the group by clicking Get Group, the system does not calculate the default proposed budgeted increases for workers added to the group.</p> <p>The system loads the page in chunks of group members. Use the Previous and Next buttons to select the data of the worker you want to view.</p> <hr/>
Total in Group	Displays the total number of workers in the group.
<i>Propose Raises</i>	
<p>The system enters default proposed increases based on the budget that you identified when you entered the page. It applies calculations only to budgeted rate codes that are already in the worker's compensation package. If you want to add additional salary components to the worker's compensation package or to increase components that were not originally budgeted, add these manually in the Pay Components grid on this page.</p>	
Effective Sequence	<p>Select the sequence number of the action that you defined for the budget increase on the Create/Approve Group Budget - Budget Requested page.</p> <p>This sequence number determines the order in which the salary increases are compounded if more than one action and reason appears in the budget for the same effective date. For example, suppose the first action and reason results in an increased amount of compensation for a rate code from 50,000 USD to 53,000 USD. The second action and reason results in an additional 3 percent for the same rate code. Because of the sequence, the system calculates and adds 3 percent of 53,000 USD.</p>
Action and Reason	Select the action and reason that you defined for the budget increase on the Create/Approve Group Budget - Budget Requested page.
New Compensation Rate	Displays the worker's new compensation rate as of the effective date, sequence, action, and reason. The Job Curr/Freq field displays this new compensation rate.
Compensation Frequency	Displays the currency code and frequency specified in the worker's Job record. The calculations appear in this currency and frequency.
Change Amount	Displays the amount of the worker's total increase for this effective date, sequence, action, and reason for all components of the budget that are in the worker's compensation package.
Change Percent	Displays the worker's total percent increase by applying the effective date, sequence, action, and action reason to all of the budget increase components that are in the worker's compensation package.

New Compa Ratio	Displays the worker's new compa-ratio. The system calculates the compa-ratio figure from the data in the Salary Grade table.
New Annual Rate	The system calculates and displays the worker's new annual rate by applying the budgeted increase for this effective date, sequence, action, and reason to the applicable rate codes in the worker's compensation package.
New % Range (new percent in range)	Displays the worker's new percent in range. The system calculates the percent in range figure from the data in the Salary Grade table.
Months Since Last Increase	Displays the number of months since the worker's last increase.
Annual Increase Percent	Displays the worker's annualized change in terms of percent.
Job Ratio	Displays the job ratio of the job code assigned to this worker. The job ratio is derived from the values in the Job Ratio group box on the Job Code Table - Default Compensation page and the worker's compensation rate.

Pay Components

The pay components listed in the grid are those defined on the Job Data - Compensation page. The grid is populated when you enter the page. When you click Calculate, the system applies the increases to the rate code. To recalculate and refresh the data on the Create/Approve Group Budget - Budget Requested page after you manually add or change data here, click the Refresh button in the Grand Total section of the Summarize and Approve Raises page.

Note. Do not click the Calculate button after you make manual changes on this page because you will lose your manual changes. Instead, click the Refresh button in the Grand Total section of the Summarize and Approve Raises page. The Refresh button updates the requested budget on the Budget Requested page.

If a raise status is *Processed*, then this grid is not accessible.

Amounts Tab

Rate Code	Displays the rate codes in the worker's compensation package. If you are manually entering a new data row, you can select a rate code from the valid values.
Seq (sequence)	Displays the sequence number of the rate code in the compensation package.
Details	Click to view details about the rate code.
New Comp Rate (new compensation rate)	Displays the compensation rate for the rate code after applying the new amount, percent, or points.
New Currency	If you want the rate code to have a different currency, select that currency here. For points-type rate codes, this field is not available for change.

New Frequency	If you want the rate code to have a different frequency, select that frequency here. Valid values are stored in the Frequency table.
New Points	If you proposed an additional point value for the rate code, that new point value appears here.
New Percent	If you proposed a different percent value for the rate code, that new percent value appears here.
New Rate Code Group	You can select a different rate code group for the percent increase.

Changes Tab

Rate Code	Displays the rate codes in the worker's compensation package. If you are manually entering a new data row, you can select a rate code from the valid values.
Seq (sequence)	Displays the sequence number of the rate code in the compensation package.
Change Amount	Displays the proposed change in the amount of compensation for the rate code, in the currency and frequency of the rate code.
Change Points	If the rate code type is Points, displays the proposed change in the points for the rate code. You can enter a value for a new data row if the rate code type is Points.
Change Percent	Displays the proposed percent of change in the compensation for the rate code.

Conversion Tab

Source	Indicates how the pay component got into the pay components grid. Values are: <ul style="list-style-type: none"> • <i>Manual</i>: The pay component was added manually. • <i>Salary Step</i>: The pay component was a default value from the salary step. • <i>Job Code</i>: The pay component was provided by default from the Job Code, and so on.
Default Without Override	Used for multiple components of pay.
Apply FTE	The system indicates whether Apply FTE is selected for this rate code in the Comp Rate Code table.
Convert Comprt (converted compensation rate)	Displays the compensation rate for the rate code converted to the worker's compensation frequency and currency.

Employee Review Rating

In this section, view the results of the worker's review. The fields in this section are the same as those on the Employee Review page.

Employee Salary History - Rates Tab

In this section, view each salary change in the worker's salary history over time. The fields in this section detail each salary change and are the same as those in the worker's Job record.

Job EffDt (job effective date) and Job EffSeq (job effective sequence)	The effective date and effective sequence of the change in the worker's compensation.
Action and Reason	The action and reason that resulted in the change in the worker's compensation, as recorded in the Job record.
Comp Rate (compensation rate)	The worker's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
Currency and Frequency	The currency and frequency of the worker's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
Change Percent and Change Amount	The percent of change and amount of change in the worker's compensation for the job effective date, job effective sequence, action, and reason.

Employee Salary History - Salary Grade Tab

Job EffDt (job effective date) and Job EffSeq (job effective sequence)	The effective date and effective sequence of the change in the worker's compensation.
Salary SetID	The setID associated with the worker's salary.
Sal Plan (salary plan) and Grade	The salary plan and salary grade associated with the worker's job row.
Comp-Ratio (compa-ratio)	The worker's compa-ratio for this job row, calculated from data in the Salary Grade table.
Month Last Incr (month last increase)	The number of months since the previous salary increase.

See Also

Chapter 7, "Budgeting and Planning Salary Increases," Viewing Budget Information, page 156

Viewing the Salary Plan Summary

Access the Summarize and Approve Raises page (Compensation, Base Compensation, Group Increases, Assign Group Increases, Summarize and Approve Raises).

Propose Raises
Summarize and Approve Raises
Budget Information

Group ID: HXECOMP2 e-Comp Group 2 Budget ID: HXECOMPID HXECID
Budget Period: 01/01/2001 - 12/31/2001 Salary Planning Start Date: 01/01/2001

Grand Total
Total Annual Salaries: 0.000 USD Average Percent: 0.00 Refresh

Approve All

Approve Raises Customize Find View All First 1-14 of 14 Last

Rank	*Status	Empl ID	Record	Name	Eff Date	Seq	Action	Reason	Comp Rate	Currency	Freq	Compensation Change
0	Proposed	HXEC01	0	MacGregor,Kelsey	01/01/2001	0	PRO	NCP	1458.33	USD	M	17,500.00
0	Proposed	HXEC02	0	MacGregor,George	01/01/2001	0	PRO	NCP	2916.67	USD	M	35,000.00
0	Proposed	HXEC03	0	Weatherford,Patsy	01/01/2001	0	PRO	NCP	1604.17	USD	M	19,250.00
0	Proposed	HXEC04	0	Weatherford,Bob	01/01/2001	0	PRO	NCP	3208.33	USD	M	38,500.00
0	Proposed	HXEC05	0	Presley,Bob	01/01/2001	0	PRO	NCP	3895.83	USD	M	46,750.00
0	Proposed	HXEC06	0	Preston,Edward	01/01/2001	0	PRO	NCP	7791.67	USD	M	93,500.00
0	Proposed	HXEC07	0	Rice,Bob	01/01/2001	0	PRO	NCP	3895.83	USD	M	46,750.00
0	Proposed	HXEC08	0	Rice,Anne	01/01/2001	0	PRO	NCP	7791.67	USD	M	93,500.00
0	Proposed	HXEC09	0	Rice,Susan	01/01/2001	0	PRO	NCP	6500.00	USD	M	78,000.00
0	Proposed	HXEC10	0	Rice,Ben	01/01/2001	0	PRO	NCP	5000.00	USD	M	60,000.00
0	Proposed	HXEC11	0	Elliott,Sam	01/01/2001	0	PRO	NCP	4233.33	USD	M	50,800.00
0	Proposed	HXEC12	0	Elliott,Justine	01/01/2001	0	PRO	NCP	3466.67	USD	M	41,600.00
0	Proposed	HXEC13	0	Darrin,Larry	01/01/2001	0	PRO	NCP	3895.83	USD	M	46,750.00
0	Proposed	HXEC14	0	Darrin,Michelle	01/01/2001	0	PRO	NCP	7791.67	USD	M	93,500.00

Summarize and Approve Raises page

Budget Period Displays the start and end dates that you defined for this budget ID.

Salary Planning Start Date Displays the salary planning start date that you defined for this budget ID.

Approve All Once you have finalized the plan, click Approve All to mark all increases with the *Approved* status. Increases must have the *Approved* status to be loaded into the workers' job records by the Load Salary Changes process.

Grand Total

Total Annual Salaries	Displays the total of all of the salaries in the salary plan.
Average Percent	Displays the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the plan.
Refresh	Click this button after you modify the salary increase plan. The system updates the Grand Total.

Approve Raises

Displays the following information for each worker in the group. With the exception of the Rank and Status fields, this information is identical to the information on the Propose Raises page.

Rank	Enter a rank number if you want the workers to appear in an order other than by worker ID. Use this field for force ranking, such as listing workers from the highest increase to the lowest.
Status	<p>Select <i>Approved</i>, <i>Ineligible</i>, <i>No Incr</i> (no increase), <i>Processed</i>, or <i>Proposed</i>. The default is <i>Proposed</i>.</p> <p>You cannot change the status to <i>Processed</i>. The Load Salary Changes process sets the status to <i>Processed</i> when it loads increases to JOB.</p> <hr/> <p>Note. If the status is <i>Processed</i>, then you cannot modify the status manually.</p> <hr/>
Name	Displays the name of each member of the group.
Compensation Change	Displays the change in the worker's compensation.

Viewing Budget Information

Access the Budget Information page (Compensation, Base Compensation, Group Increases, Assign Group Increases, Budget Information).

Propose Raises		Summarize and Approve Raises		Budget Information																																																							
Group ID:	HXECOMP2 e-Comp Group 2		Budget ID:	HXECOMPID HXECID																																																							
Budget Period:	01/01/2001 - 12/31/2001		Salary Planning Start Date:	01/01/2001																																																							
Level of Proration:	Annual		Currency Code:	USD Refresh																																																							
<div> <div>▼ Budget Description</div> <div>Find First 1 of 1 Last</div> </div>																																																											
Effective Date:	01/01/2001		Effective Sequence:	0 Request Approval																																																							
Action	Promotion		Reason:	Norm Prog																																																							
<input checked="" type="checkbox"/> Budget Approved			Budget Approval Date:	01/01/2001																																																							
Requested Amount:	732,915.000		Avg Pct:	0.00																																																							
Current Budget Amount:	732,915.000																																																										
Available Amount:	0.000																																																										
<table border="1"> <thead> <tr> <th colspan="9">Budget Information</th> </tr> <tr> <th>Rate Code</th> <th>Total Increase</th> <th>Chng Amt</th> <th>Change Pct</th> <th>Add Percent</th> <th>Chng Pts</th> <th>Pct of Pts</th> <th>Currency</th> <th>Frequency</th> </tr> </thead> <tbody> <tr> <td>HXFLT1</td> <td>21000.00 </td> <td></td> <td>10.00</td> <td></td> <td></td> <td></td> <td>USD</td> <td>A</td> </tr> <tr> <td>HXFLT2</td> <td>27500.00 </td> <td></td> <td>10.00</td> <td></td> <td></td> <td></td> <td>USD</td> <td>A</td> </tr> <tr> <td>HXHR01</td> <td>4.000000 </td> <td></td> <td>10.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>HXPNT1</td> <td>10800.000000 </td> <td></td> <td></td> <td></td> <td></td> <td>10.00</td> <td></td> <td>A</td> </tr> </tbody> </table>						Budget Information									Rate Code	Total Increase	Chng Amt	Change Pct	Add Percent	Chng Pts	Pct of Pts	Currency	Frequency	HXFLT1	21000.00		10.00				USD	A	HXFLT2	27500.00		10.00				USD	A	HXHR01	4.000000		10.00						HXPNT1	10800.000000					10.00		A
Budget Information																																																											
Rate Code	Total Increase	Chng Amt	Change Pct	Add Percent	Chng Pts	Pct of Pts	Currency	Frequency																																																			
HXFLT1	21000.00		10.00				USD	A																																																			
HXFLT2	27500.00		10.00				USD	A																																																			
HXHR01	4.000000		10.00																																																								
HXPNT1	10800.000000					10.00		A																																																			

Budget Information page

This page is display only. The information is similar to that found on the Budget Requested and Budget Components pages.

Refresh

Click to update the Requested Amount and Available Amount.

Available Amount

Represents the difference between the Current Budget and Requested Budget. It is calculated when you click [Refresh](#) or save the component.

If the variance is a positive amount, the salary plan exceeds the budgeted amount. If the variance is a negative amount, the planned salaries fall short of the budgeted amount.

Request Approval

This button appears only if the budget is approved.

If the Available Amount is negative and the budget was approved, you must request a new approval because you will not be able to save without requesting a new approval if the Available Amount is negative.

If you do not want to request a new approval, you have to leave the component without saving.

If you request a new approval, the budget will be unapproved and the Budget Approval Date will be deselected. These changes will be reflected in the Budget Requested pages.

Loading Salary Changes to Compensation Records

This section provides an overview of loading salary changes to compensation records, lists prerequisites, and discusses how to:

- Create and refresh anniversary dates.
- Run salary changes.

Understanding Loading Salary Changes to Compensation Records

After you approve your salary increase plans and budgets, you can load the salary increases to the workers' Job records. The system provides a Load Salary Changes process to load all approved salary increases for the group ID and budget period start date that you specify.

This process inserts a new row for the worker in the Job record and the Compensation record. In addition to the new compensation rate, the new record contains the effective date, sequence, action, and action reason that you defined for the increase on the Create/Approve Group Budget - Budget Requested page.

Prerequisites

Before you can run the processes to load salary changes to the Job Data records:

- The Salary Plan Approved check box must be selected on the Create/Approve Group Budget - Budget Requested page.
- The individual worker increases must be marked *Approved* on the Summarize and Approve Raises page.

Pages Used to Refresh Anniversary Dates

Page Name	Definition Name	Navigation	Usage
Refresh Anniversary Date	RUNCTL_GRPANNV	Compensation, Base Compensation, Group Budgets, Refresh Anniversary Date, Refresh Anniversary Date	Use this process only if your Salary Increase Plan is based on Employee Anniversary Dates, as specified on the Assign Group Budget Parameters page. Running this process will populate a temporary table with required anniversary dates of workers in your group.

Page Name	Definition Name	Navigation	Usage
Load Group Increases	RUNCTL_CMP006	Compensation, Base Compensation, Group Increases, Load Group Increases, Load Group Increases	Run the Load Salary Changes application engine process. The process loads all the new rows into your workers' job and compensation records for the budget date that you specify.

Creating and Refreshing Anniversary Dates

Access the Refresh Anniversary Date page (Compensation, Base Compensation, Group Budgets, Refresh Anniversary Date, Refresh Anniversary Date).

Refresh Anniversary Date

Run Control ID: TEST [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

Group ID:

Budget Period Start Date:

Budget ID:

Refresh Anniversary Date page

- Group ID** Enter the ID of the group for which you want to refresh anniversary dates.
- Budget Period Start Date** Enter the start date of the budget for which you want to refresh anniversary dates.
- Budget ID** Enter the ID of the budget for which you want to refresh anniversary dates.

Running Salary Changes

Access the Load Group Increases page (Compensation, Base Compensation, Group Increases, Load Group Increases, Load Group Increases).

Load Group Increases

Run Control ID: 100

Report ManagerProcess Monitor

Run

Report Request Parameter(s)

Group ID:

EVC

EVC

Budget Period Start Date:

☐ Position☐ Update Future Rows

Load Group Increases page

Before using this page, the salary increase budget must be approved. Each worker increase that you want to load must have approved status on the Summarize and Approve Raises page.

Group ID	Enter the group ID for which you want to load salary changes.
Budget Period Start Date	Enter the budget period start date for which you want to load the group's salary changes.
Position	Select to choose workers who have a position.
Update Future Rows	Select to update the Job and Compensation future rows with the increase.

(MEX) Defining the Increase Matrix Method

In Mexico, you can define salary increase calculations in two ways:

- Standard budget raise method.
- Salary increase matrix method.

With the standard budget raise method, you can take the budgeted percentage and insert it into the worker's salary plan. With the salary increase matrix method, you can take the percentage from the salary increase matrix.

Once you select the increase method on the Default Budget Parameters page and the Assign Group Budget Parameters page, you need to calculate the salary increase for the worker.

To calculate the salary increase if you select the By Matrix increase method:

1. Determine the result of the last evaluation before the increase effective date.
2. Determine the worker compensation quartile.
3. Determine the increase percentage.
4. Update worker data with the new raise percentage.

The following topics define how you calculate the salary increase matrix method.

Step 1 - Determine the Result of the Last Evaluation

Go to the Employee Review page to see the results. The Review Rating field indicates the result of the last evaluation. In our example, the worker received a review rating of 3 (*Average*) in his last evaluation.

Verify the effective date of the last evaluation on the Propose Raises page. In our example, the last effective date entered, indicated in the Start Date field, is 04/01/2000.

Note. Also enter the effective date for the new evaluation on the Propose Raises page.

Step 2 - Determine the Worker Compensation Quartile

Determine the worker's compensation quartile in the salary matrix on the Salary Plan page. Enter the salary administration plan, grade, and step for the worker. The matrix to which the worker belongs appears on this page.

On the Compensation page, verify the hourly, daily, monthly, and annual pay rates for the worker.

In our example, when we look at the Compensation page, we see that the monthly salary for this worker is 2166.67.

Once we have determined the worker's monthly salary, we look at the quartile.

On the Salary Grade Table page, you see the minimum, midpoint, and maximum salary ranges for the worker's salary grade.

Determine the worker's quartile using this formula:

$$\text{Quartile} = \text{Min.} + \left[\text{Quartile No.} \times \left(\frac{\text{Max.} - \text{Min.}}{4} \right) \right]$$

Worker's Quartile Formula

The quartiles for the salary ranges are Below, Quartile 1, Quartile 2, Quartile 3, and Quartile 4.

<i>Frequency</i>	<i>Below</i>	<i>Quartile 1</i>	<i>Quartile 2</i>	<i>Quartile 3</i>	<i>Quartile 4</i>
Annual	39,600.00	45,227.50	50,855.00	56,482.50	62,110.00
Monthly	3,300.00	3,768.96	4,237.92	4,706.87	5,175.83
Daily	152.31	173.96	195.60	217.25	238.89
Hourly	19.04	21.75	24.45	27.16	29.86

Since our worker's monthly salary is 2166.67, we determine that this worker is in the Below range.

Note. The data used on the quartile formula is taken from the Salary Grade table.

Step 3 - Determine the Increase Percentage

Look at the Salary Increase Matrix table on the Define Salary Increase Matrix Table page to determine the salary increase percentage. In our example, we have a range, instead of an amount, so we need to calculate the average to find the increase percentage.

The information needed to determine the increase percentage for this worker is as follows:

- Review result = 3 (Average)
- Quartile = Below minimum
- Matrix = KUEx

Go to the Define Salary Increase Matrix Table page. There, in the Salary Increase Matrix group box, you see the minimum and maximum ranges for the increase percentages for each quartile.

For the Below Minimum range, you see that the minimum percentage is 5.0 and the maximum percentage is 9.0.

We calculate the increase percentage as follows:

$$\text{Increase percentage} = \frac{(9.0 + 5.0)}{2} = 7.0$$

Increase Percentage Formula

So, this worker will receive a salary increase percentage of 7 percent.

Step 4 - Update Worker Data with the New Raise Percentage

Go to the Create/Approve Group Budget - Budget Components page to update the new salary increase. There, on the Changes tab, enter the rate code that corresponds to the increase percentage.

Once you have entered the new raise percentage, the worker's new salary, change amount, and change percent appear.

See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps, page 16

Chapter 8

Defining, Assigning, and Approving Merit Increases

This chapter discusses how to:

- Define merit increase IDs and groups.
- Assign, approve, and load merit increases.

Defining Merit Increase IDs and Groups

To define merit increase IDs and groups, use the Define Merit Group (SP_MERIT_ELIG_GBL) and Define Merit Increase (SP_MERIT_INCR_TBL_GBL) components.

This section discusses how to:

- Define merit increase IDs.
- Define review results resolution.
- Define merit groups.

Note. Before you can assign and approve merit increases for workers, you must first define merit increase IDs and merit groups.

Pages Used to Define Merit Increase IDs and Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Merit Increase	SP_MERIT_INCR_DEFN	Compensation, Base Compensation, Merit Increases, Define Merit Increase	Define Merit Increase IDs for merit points or merit ranges.
Review Results Resolution	SP_MERIT_INCREASES	Compensation, Base Compensation, Merit Increases, Define Merit Increase, Review Results Resolution	Define merit increase guidelines (review results resolutions) per merit point or per merit range.

Page Name	Definition Name	Navigation	Usage
Define Merit Group	SP_MERIT_ELIG	Compensation, Base Compensation, Merit Increases, Define Merit Group	Define review selection criteria for a Group ID. The system will use the information to retrieve worker reviews.

Defining Merit Increase IDs

Access the Define Merit Increase page (Compensation, Base Compensation, Merit Increases, Define Merit Increase).

Define Merit Increase page

- Status** Select *Active* or *Inactive*. Only merit increase types with a status of *Active* can be used.
- Description** Enter a description of the Merit Increase ID.
- Merit Increase Type** Indicate if the merit increase is by point (Merit Increase by Point), by point range (Merit Increase by Points Range), or by review rating (Merit Increase by Revw Rating). The system will display different fields on the Review Points Resolution page, depending on which option you choose.

Defining Review Results Resolution

Access the Review Results Resolution page (Compensation, Base Compensation, Merit Increases, Define Merit Increase, Review Results Resolution).

Define Merit Increase

Review Results Resolution

Merit Increase ID: HXPM

Merit Increase

Find | View All | First 1 of 1 Last

Effective Date: 01/01/1990

Effective Status: Active

Rate Code: HXPSB1 Base1

Rate Code Type: Flat Amt

Change Amount: 5000.00

Currency Code: USD

Change Percent:

Compensation Frequency: A Annual

Review Results Resolution page

Define Merit Increase

Review Results Resolution

Merit Increase ID: K0001

Merit Increase

Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980

Effective Status: Active

Merit Increase by Points Range

Customize | Find | First 1-4 of 4 Last

Range

Flat Amount/Hourly

Percent

Salary Points

	*Range ID	From Points	To Points	Rate Code	Description	Rate Code Type		
1	1	30	35	K0GRCN	Percent	Percent	+	-
2	2	36	40	K0GRCN	Percent	Percent	+	-
3	3	41	45	K0GRCN	Percent	Percent	+	-
4	4	46	50	K0GRCN	Percent	Percent	+	-

Review Results Resolution page: Range tab

Define Merit Increase

Review Results Resolution

Merit Increase ID:

K0001

Merit Increase

Find | View All | First 1 of 1 Last

Effective Date:

01/01/1980

Effective Status:

Active

Merit Increase by Points Range

Customize | Find | First 1-4 of 4 Last

Range

Flat Amount/Hourly

Percent

Salary Points

	*Range ID	Change Amount	Currency	Frequency	Description	Change Percent		
1	1						+	-
2	2						+	-
3	3						+	-
4	4						+	-

Review Results Resolution page: Flat Amount/Hourly tab

Define Merit Increase

Review Results Resolution

Merit Increase ID:

K0001

Merit Increase

Find | View All | First 1 of 1 Last

Effective Date:

01/01/1980

Effective Status:

Active

Merit Increase by Points Range

Customize | Find | First 1-4 of 4 Last

Range

Flat Amount/Hourly

Percent

Salary Points

	*Range ID	Change Percent	Rate Code Group	Description		
1	1	3.00			+	-
2	2	5.00			+	-
3	3	10.00			+	-
4	4	12.00			+	-

Review Results Resolution page: Percent tab

Define Merit Increase Review Results Resolution

Merit Increase ID: K0001

Merit Increase Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980 Effective Status: Active

Merit Increase by Points Range Customize | Find | First 1-4 of 4 Last

Range Flat Amount/Hourly Percent Salary Points

	*Range ID	Change Points	Frequency	Description	Change Percent		
1	<input type="text" value="1"/>					+	-
2	<input type="text" value="2"/>					+	-
3	<input type="text" value="3"/>					+	-
4	<input type="text" value="4"/>					+	-

Review Results Resolution page: Salary Points tab

Rate Code

Select a value for the Rate Code field to associate with this merit increase ID. If you select a rate code with a Rate Code Type of:

- *Flat Amount* or *Hourly*, enter a Change Amount or a Change Percent value, but not both.
- *Percent*, enter a Change Percent and Rate Code Group (if you are using rate code groups).
- *Points*, enter Change Points or Change Percent, but not both.

Change Amount

Enter the salary change amount, currency, and the frequency with which it is paid.

Change Points

Enter the change in points.

Change Percent

Enter the salary change percent.

Rate Code Group

Select a rate code group.

Merit Increase by Points Range

The system displays the Merit Increase by Points Range table when you select Merit Increase by Points Range on the Define Merit Increase page.

Range ID, From Points, and To Points Enter a Range ID and the from and to salary points of the range.

Rate Code

Select a Rate Code. If you select a Rate Code Type of:

- *Flat Amount* or *Hourly*, enter a Change Amount or a Change Percent value, but not both, on the Flat Amount/Hourly tab.
- *Percent*, enter a Change Percent and Rate Code Group (if you are using rate code groups) on the Percent tab.
- If you select *Points*, enter Change Points or Change Percent, but not both, on the Salary Points tab.

Defining Merit Groups

Access the Define Merit Group page (Compensation, Base Compensation, Merit Increases, Define Merit Group).

Define Merit Group page

Define a merit group. When you select a Group ID on the Assign/Approve Merit Increase, Load Merit Increases, and Report Merit Increases pages, the system will retrieve data for the workers of the selected group who:

- Have a review Period End Date in the Employee Review that is the latest date in the timeframe on the page.
- Have a Review Type matching the one defined.

Assigning, Approving, and Loading Merit Increases

This section discusses how to:

- Assign and approve merit increases.
- Review merit increase details.
- Load merit increases.
- Report merit increases.

Use the Assign/Approve Merit Increases component to:

- View the approved and completed review results for a group of workers (as defined in the Define Merit Group component).
- Calculate merit increases for a group of workers based on the review results and a Merit Increase ID.
- Adjust the merit increases calculated by the system.
- Approve or deny merit increases for individual workers in a group.

Once you have assigned merit increases and selected to approve or deny the increases, you can load the increase information into the Job table using the Load Merit Increases process.

Pages Used to Assign and Approve Merit Increases

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign/Approve Merit Increase	SP_MERIT_INCR_GRP	Compensation, Base Compensation, Merit Increases, Assign/Approve Merit Increases, Assign/Approve Merit Increases	Calculate merit increases for the workers in the selected group based on the workers' review results and the merit increase guidelines associated with the Merit Increase ID.
Merit Increase Details	SP_MERIT_INCR_EE	Compensation, Base Compensation, Merit Increases, Assign/Approve Merit Increases, Merit Increase Details	Review details about the worker merit increase and make changes, if required.
Load Merit Increases	RUNCTL_SP_MERIT	Compensation, Base Compensation, Merit Increases, Load Merit Increases	Load the approved merit increases into worker job data and flag the increases as processed.
Report Merit Increases	RUNCTL_SP_MERIT	Compensation, Base Compensation, Merit Increases, Report Merit Increases	Create a report on the merit increases for a group of workers.

Assigning and Approving Merit Increases

Access the Assign/Approve Merit Increase page (Compensation, Base Compensation, Merit Increases, Assign/Approve Merit Increases, Assign/Approve Merit Increases).

Assign/Approve Merit Increase
Merit Increase Details

Group ID: K0MERIT2001 Merit Increase 2001

Review Selection Criteria

Doc Type: K0MERIT1 Perf Reww Get Review Results

Period End - From Date: 01/01/2001 Through Date: 12/31/2001

Merit Increases

Merit Increase ID: K0001 Pct Incr - Pts Range (Re)Calculate Increases

Increase						
	*Status	EmplID	Record	Rate Code	Increase	Description
1	Proposed	KU0100	0	K0GRCN	10.00	Percent
2	Proposed	KU0101	0	K0GRCN	12.00	Percent
3	No Incr	KU0106	1		0.00	
4	Proposed	KU0112	1	K0GRCN	5.00	Percent
5	Proposed	KU0119	0	K0GRCN	3.00	Percent

Approve All

Assign/Approve Merit Increase page

Get Review Results Click to retrieve the review results for the workers in the merit group (as defined on the Define Merit Group page).

Merit Increase ID Select a Merit Increase ID to apply to the members of this merit Group ID. Merit Increase IDs are defined on the Define Merit Increase component.

(Re)Calculate Increases Click to calculate or recalculate merit increases. The system uses the change values entered on the Define Merit Increase component. The system sets the Status to *Proposed* for each worker listed. If the merit increase is zero (0), the system sets the status to *No Increase*.

Note. Click only to calculate the merit increases based on the review points resolution associated with the Merit Increase ID. If you click this button after having made manual changes, the system will erase your changes and reapply the changes associated with the Merit Increase ID.

Status

Select one of the following statuses for each worker's merit increase:

- *Approved*

When you select this value, the system makes the merit increase fields unavailable for entry. Select to approve the merit increase.

- *Ineligible*

When you select this value, the system makes the merit increase fields unavailable for entry. Select if the worker is ineligible for a merit increase.

- *No Incr* (no increase)

When you select this value, the system makes the merit increase fields unavailable for entry. Select to deny the worker the calculated increase.

- *Proposed*

Select to manually adjust the merit increase amount calculated by the system on the Merit Increase Details page, if required. The system selects the Manually Updated flag on the Merit Increase Details page when you make an adjustment. Once you have entered the appropriate merit increase, select *Approved* to approve the increase or *No Incr* or *Ineligible* to deny it.

- *Processed*

The system selects this status when it has processed a merit increase for this worker. You cannot modify the merit increase or status for this worker.

Note. You can manually change a worker's merit increase on the Merit Increase Details page before you select a status.

Approve All

Click to set the status from *Proposed* to *Approved*. The system does not modify the statuses *No Incr*, *Ineligible*, and *Processed*.

Note. You can manually change a worker's merit increase on the Merit Increase Details page before you approve all the merit increases.

Reviewing Merit Increase Details

Access the Merit Increase Details page (Compensation, Base Compensation, Merit Increases, Assign/Approve Merit Increases, Merit Increase Details).

Assign/Approve Merit Increase		Merit Increase Details	
Group ID:	K0MERIT2001	Merit Increase 2001	
Doc Type:	K0MERIT1	Performance Review	
Period End - From Date:	01/01/2001	Through Date:	12/31/2001
Merit Increases Find View All First 1 of 5 Last			
Empl ID:	KU0100	Courtney Osborn	Record: 0
Rate Code:	K0GRCN	Percent	<input type="checkbox"/> Manually Updated
Rate Type:	Percent		
	10.00		
Change Percent:		Rate Code Group:	
Approval Details			
* Status:	Proposed	Approval Date:	
Approver Empl ID:		Approver Name:	

Merit Increase Details page (1 of 2)

▼ Job Information			
Effective Date:	06/25/2009	Eff Seq:	0
Business Unit:	US006	US006 BU	Company: GBI
Department:	13000	Finance	Position Number: 19000024
Job Code:	200005	Job Title:	Auditor-General
Sal Plan:	KU01	Grade:	006
		Step:	
Current Comp Rate:	2166.67	USD	Monthly
Current Annual Rate:	26000.00	USD	
▼ Employee Review Rating			
Doc Type:	K0MERIT1	Performance Review	
Period Begin Date:	01/01/2001		
Period End Date:	12/31/2001		
Document Status:	Completed		
Review Points:	42		

Merit Increase Details page (2 of 2)

Rate Code

If changes are necessary, select a Rate Code to associate with this Merit Increase ID. If you select a Rate Code with a Rate Code Type of:

- *Flat Amount* or *Hourly*, enter a Change Amount or a Change Percent value.
- *Percent*, enter a Change Percent and Rate Code Group (if you are using rate code groups).
- *Points*, enter Change Points and Frequency or Change Percent.

Status

Select the appropriate status for this worker's merit increase (values listed on the Assign/Approve Merit Increase page). To approve the changes, select *Approve*.

Loading Merit Increases

Access the Load Merit Increases page (Compensation, Base Compensation, Merit Increases, Load Merit Increases).

Load Merit Increases

Run Control ID: TEST [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

Group ID: K0MERIT2001 Merit Increase 2001

Doc Type: K0MERIT1 Performance Review

Period End - From Date: 01/01/2001

Period End - Through Date: 12/31/2001

As Of Date: 06/25/2009

Action: Pay Rt Chg ☐ Update Future Rows

Reason Code: MER Merit ☐ Don't Absorb Changes

Load Merit Increases page

Group ID, Doc Type, Period End - From Date, and Period End - Through Date Select values for these fields for the workers whose merit increase data you want to load into the Job table.

As Of Date Select the date as of which you want the merit increase to take effect.

- Actionand Reason Code

Select the action and reason associated with the merit increase for the selected workers.
- Update Future Rows

Select to have the system update future dated rows with the merit increase.
- Don't Absorb Changes

Select to indicate that the merit increase should not be absorbed into the salary premium (this option only applies to those rate codes with absorbing premiums).

Reporting Merit Increases

Access the Report Merit Increases page (Compensation, Base Compensation, Merit Increases, Report Merit Increases).

Report Merit Increases

Run Control ID: TEST

[Report Manager](#) [Process Monitor](#)

Run

Report Request Parameter(s)

Group ID:

K0MERIT2001

Merit Increase 2001

Doc Type:

K0MERIT1

Performance Review

Period End - From Date:

01/01/2001

Period End - Through Date:

12/31/2001

Report Merit Increases page

Group ID, Doc Type,

Select values for these fields for the workers whose merit increase data you want to report on.

Period End - From Date,

and Period End -

Through Date

174

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

Chapter 9

Processing Mass Salary Increases

This chapter discusses how to:

- Update salaries by salary plan or pay group.
- Update salaries by job code.
- (USF) Administer mass pay adjustments.

Updating Salaries by Salary Plan or Pay Group

This section provides an overview of updating salaries and discusses how to update the job compensation rate.

Understanding Salary Updating

Use the Update by Sal Plan/Paygroup (update by salary plan or pay group) process to perform salary grade or step updates for all workers in a salary grade. This functionality is useful if the compensation changed retroactively. Use pay group parameters or salary plan parameters to run the update.

The system performs the following processes for all workers in the specified pay group or salary grade during the specified time period:

- For grade changes, the system checks the Salary Grade table for any changes in minimum, midpoint, and maximum pay rate during the specified dates for the worker's job. If it finds a pay rate change, it enters a new job row with the effective date of the grade change.
- For step changes, the system compares the compensation package of the worker with the package of the step. If it finds a change in the step, it enters a new job row with the effective date of the step change, the new package, and marks it as a manual change.

You complete these steps to run the Update by Sal Plan/Paygroup process:

1. Run the process (CMP008) using PeopleSoft Application Engine to apply the update to the salary plan or pay group.
2. Run the SQR report (CMP008) to review the data created by running the process.
3. In a separate run, run process HR_SP_CI using PeopleSoft Application Engine to load data to the Job Data pages for your workers.

Note. You run all these processes from the same run control page but you must run the CMP008 Application Engine program and SQR report to completion before you run the HP_SP_CI Application Engine program.

After the processes have run, you can use the Below Minimum Analysis report to audit your work. The Below Minimum Analysis report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose HR Status is *Active*, *Leave of Absence*, *Suspended*, or *Leave with Pay*.

Page Used to Run the Sal Plan/Paygroup Process

Page Name	Definition Name	Navigation	Usage
Update By Plan/Paygroup	RUNCTL_CMP008	Compensation, Base Compensation, Maintain Plans, Update by Plan/Paygroup, Update By Plan/Paygroup	Update the job compensation rate when the salary grade or step changes retroactively.



Updating the Job Compensation Rate


Access the Update By Plan/Paygroup page (Compensation, Base Compensation, Maintain Plans, Update by Plan/Paygroup, Update By Plan/Paygroup).

Update By Plan/Paygroup

Run Control ID: TEST [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

Start Date:  End Date:  ☐ Show Components on Report

Action: Reason:  ☐ Update Future Rows

☐ Don't Absorb Changes

Process By

☒ Group ID ☐ Paygroup ☐ Sal Plan/Grade

Group Parameters

Group ID: As Of Date: 06/25/2009

Paygroup Parameters

Company: Pay Group:

Salary Administration Plan

Business Unit: GBIBU GBI BU Sal Plan: Salary Grade:

Update By Plan/Paygroup page

Report Request Parameter(s)

Start Date and End Date	Enter the start and end dates of the period. The system retrieves the salary change between these dates.
Show Components on Report	Select if you want the pay components to appear on the report.
Action and Reason	Enter the action and reason defining the salary update on the new job row.
Update Future Rows	Select to have the process update future dated rows (those rows with an effective date later than the Salary Change Effective Date) with salary information.
Don't Absorb Changes	<p>Select to instruct the system to leave absorbable rate codes unchanged if the system provides the salary amount by default.</p> <p>This option only applies to workers who have a Target Comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.</p>

Process By

Group ID	Select to process by Group ID. The Group ID field will become available. Enter the Group ID you want to process.
Paygroup	Select to process by pay group. The fields in the Paygroup Parameters group box become available.
Sal Plan/Grade (salary plan/grade)	Select to process by salary plan and grade. The fields in the Sal Plan/Grade Parameters group box become available.

Paygroup Parameters

Company and Pay Group	Select the company and pay group for which you want to update salaries.
------------------------------	---

Salary Administration Plan

Business Unit, Sal Plan (salary administration plan), and Salary Grade	Select the business unit, salary administration plan, and salary grade for which you want to update salaries.
--	---

See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Defining Salary Plan Characteristics, page 21

Updating Salaries by Job Code

This section provides an overview of the Update by Job Code process and discusses how to reclassify a job code.

Understanding the Update by Job Code Process

Use the Update by Job Code process to update salary data for all workers in a job code when you change the job code salary administration plan, grade, or step in the Job Code table. The process inserts a new job row with the action and action reason codes that you specified on the Run Control page. The effective date of the change is the From Date that you specified as the run control parameter.

Page Used to Update by Job Code

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Update By Job Code	RUNCTL_CMP010	Compensation, Base Compensation, Maintain Plans, Update By Job Code	Reclassify a job code.

Reclassifying a Job Code

Access the Update By Job Code page (Compensation, Base Compensation, Maintain Plans, Update By Job Code).

Update By Job Code page

Report Request Parameter(s)

Start Date and End Date Enter the start and end dates of the period for which you want to update salaries. The system uses the Start Date as the effective date of the salary change.

Action and Reason Select the action and reason code that you want the system to enter on the new job row for the salary update.

Update Future Rows Select to have the process update future dated rows (those rows with an effective date later than the Salary Change Effective Date) with salary information.

Don't Absorb Changes Select to instruct the system to leave absorbable rate codes unchanged if the default salary amount changes.

This option applies only to workers who have a Target Comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

Process By

Group ID Select to process by Group ID. The Group ID field will become available. Enter the Group ID you want to process.

Jobcode Select to process by job code. The fields in the Jobcode Parameters group box become available.

Jobcode Parameters

Business Unit Select the business unit for which you want to update salaries.

Job Code Select the job code that you are updating.

See Also

Chapter 8, "Defining, Assigning, and Approving Merit Increases," Pages Used to Assign and Approve Merit Increases, page 169

(USF) Administering Mass Pay Adjustments

To administer mass pay adjustments for federal workers, use the Mass Pay Adjustments USF (MASS_PAY_SETUP) and Create Mass Pay Adjustment USF (RUN_FGPY005) components.

This section provides overviews of mass pay adjustments and mass pay adjustment parameters and discusses how to:

- Define a mass pay type.
- Define a mass pay plan.
- Define mass pay adjustments.
- Generate a mass pay adjustment report.
- Load salary information into tables.
- Enter designated agent information.

Understanding Mass Pay Adjustments

PeopleSoft Human Resources for U.S. Federal Government enables you to administer and manage mass pay adjustments.

During the calendar year, the U.S. President or his or her pay agent may authorize changes in the salary structures for executive branch workers covered by Title 5 of the United States Code. This authority extends to other workers covered under other sections of Title 5, as well as some workers covered under other sections of the law.

The President may also authorize changes in geographic comparability adjustments, such as Locality Pay Adjustments, Interim Geographic Adjustments, or Special Pay Adjustments for Law Enforcement Officers, authorized by the Federal Employees Pay Comparability Act (FEPCA) and administered under 5 USC 5304.

The U.S. Congress, as well as heads of certain agencies, has the discretionary authority to adjust pay for certain categories of their workers. These authorities generally authorize pay adjustments for salaried workers to be effective government-wide at the beginning of the first pay period of the new calendar year.

You complete these steps to administer mass pay adjustments:

1. Define mass pay adjustment parameters on the Mass Pay Type page and the Mass Pay Plan page.
2. Process a pay adjustment for workers on the Create Mass Pay Adjustments page.
3. Generate a mass pay adjustment report.

Defining Mass Pay Adjustment Parameters

Before performing mass pay adjustments, you must define Mass Pay Types and Mass Pay Plans for each Mass Pay Adjustment Type. The Mass Pay Adjustment Types that are available include:

- Annual Federal Wage Service
- FWS Special Rate Increase
- GS Annual Pay Adjustment
- GS Special Rate Increase
- LEO Special Pay Adjustment
- Locality Pay Adjustment

Note. Mass pay adjustments can be processed using either a percentage increase or a calculated increase using the updated pay table salaries. Once a pay adjustment is calculated, you must update the Next Scheduled Pay Adjustment data in the Salary Plan table.

Pages Used to Define Mass Pay Adjustments

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Mass Pay Type	GVT_MPA_TYPE_TBL	Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Mass Pay Adjustments USF, Mass Pay Type	Define the percentage of the pay increase and the date that the pay adjustment will go into effect. In addition, adjustment control information, such as Action, Reason Code, and NOA code data is necessary for the SF50.
Mass Pay Plans	GVT_MPA_ERNPGM_TBL	Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Mass Pay Adjustments USF, Mass Pay Plans	Identify the pay plan to be included in the pay adjustment processing as well as the type of calculation to be used. Note. Multiple pay plans can also be processed one at a time.

Page Name	Definition Name	Navigation	Usage
Mass Pay Adjustment Pay Tables	GVT_MPA_PAYTBL_SEC	Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Mass Pay Adjustments USF, Mass Pay Plans Click <i>Pay Tables</i> on the Mass Pay Plans page.	Click to view the pay table associated with the mass pay adjustment.
Create Mass Pay Adjustments	RUN_FGPY005	Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Create Mass Pay Adjustment USF, Create Mass Pay Adjustments	Indicate the parameters required to process the mass pay adjustments or, alternatively, to generate a report. You can process a single agency and pay adjustment type or multiple agencies and adjustment types.
Load Salary Tables USF	RUNCTL_FGHR029	Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Load Salary Tables USF	Load salary adjustment information from a file into the system for a particular company.
Designated Agents	GVT_DESIG_AGT_TBL	Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Designated Agents USF	Enter contact and address information for another person to whom you may want to have your paycheck delivered.

Defining a Mass Pay Type

Access the Mass Pay Type page (Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Mass Pay Adjustments USF, Mass Pay Type).

Mass Pay Type page

- Percentage** Specify the percentage of increase for the pay adjustment. If the calculation type on the Mass Pay Plan equals *Percent*, the system will use the value in this field. The Effective Date and Percentage entered become part of the key fields in the Mass Pay Plan table.
- Action** Specify the appropriate action code for this mass pay adjustment. The value selected here will be reflected on the Data Control page at the worker level.
- Reason Code** Enter the corresponding reason code for the specified action. The value selected here will be reflected on the Data Control page at the worker level.
- Nature of Action Code** Enter the nature of action (NOA) code that justifies this mass pay.
- Authority Order No.** Use this free-format field to enter the executive order number or other legal authority number that identifies which executive order was issued for pay raises. This information will print on SF50.

Defining a Mass Pay Plan

Access the Mass Pay Plans page (Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Mass Pay Adjustments USF, Mass Pay Plans).

Mass Pay Type | Mass Pay Plans

Company: DC Department of Communications

Pay Adjustment Type: GSA GS Annual Pay Adjustment

Mass Pay Adjustment Percentage

Effective Date: 01/03/1999 Ready

Percentage: 3.00

Mass Pay Calculation

*Pay Plan: GS General Schedule

Authority (1): RJR Descr (1): Reg 536.205(b)(2) Descr (2):

Authority (2): Descr (3): Descr (4):

Mass Pay Calculation Type: Pay Tables

Identify Mass Pay Tables: Include Tables Listed

Pay Tables

Mass Pay Plans page

Pay Plan Enter the pay plan for the group of workers to receive the pay adjustment. You can include multiple pay plans, if necessary.

Authority (1), Authority (2) Enter the legal authorities for the mass pay adjustment.

Calculation Type Specify the type of calculation to be used in pay adjustment processing: *Pay Tables*, *Percentage*, or *Special Calculation Routine*.

Pay Table Action Specify which pay table entries should be included or excluded from the pay adjustment. Values are *Exclude Tables Listed*, *Include All For Pay Plan*, and *Include Tables Listed*. Unless all pay tables are to be included in processing pay adjustments, the Pay Tables link will appear, enabling you to specify the appropriate selections.

Pay Tables Select this link to specify the pay tables to include or exclude when processing this mass pay adjustment.

Defining Mass Pay Adjustments

Access the Create Mass Pay Adjustments page (Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Create Mass Pay Adjustment USF, Create Mass Pay Adjustments).

Create Mass Pay Adjustments

Run Control ID: 1

Report ManagerProcess Monitor

Run

Mass Pay Adjustment

Find | View All First1 of 1Last

Company: DC Department of Communications

Pay Adjustment Type:

Action Date: 06/25/2009

Process Detail

Customize | Find | View All | First1 of 1Last

Effective Date	Percentage	Current Status	GVT Mass Pay Adj Process Act
<div></div>	<div></div>		<div>Generate Report Only</div> <div></div> <div></div>

Create Mass Pay Adjustments page

Pay Adjustment Type

Select the type of pay adjustment to be processed by agency. You can process multiple agencies and pay adjustment types.

Percentage

Specify the percentage of the pay adjustment.

GVT Mass Pay Adj Process Act(government mass pay adjustment process action)

Indicate whether you want to generate a report only or process the action and produce a report.

Important! Run the Mass Pay Adjustments Application Engine process before you run the Mass Pay Adjustments SQR report.

Note. Make sure that an entry for Mass Pay (FGPY005) for the *USFED* transaction appears on the Transaction Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions). Click the Batch Programs tab to verify that the USFED transaction is included.

Generating a Mass Pay Adjustment Report

The Mass Pay Adjustment report lists workers who cannot be processed. For one condition or another, the workers listed in this error report failed to be updated.

You can generate this report only after running the pay adjustment process. This report should *not* be run with the processing of the adjustment since it relies on a table that is created by that process—otherwise, no results will be generated. If you run this report before processing the Mass Pay Adjustment, you will be able to determine which workers have an exception. Then, you can process the exceptions manually.

These types of exceptions will appear in the report:

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

185

- Pay Rate Determinant of worker—review and process manually.
- Future effective-dated action detected—review and process manually.
- Duplicate action found for transaction—review and process manually.
- No pay rate found for the worker.
- No hourly conversion factor for worker standard hours.
- The FEGLI base rate is not updated because of the override flag.

Once the Mass Pay Adjustment process executes, the Mass Pay Type Definition you created will be updated with a status of Processed.

Loading Salary Information into Tables

Access the Load Salary Tables USF page (Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Load Salary Tables USF).

Load Salary Tables USF

Run Control ID: PS

Report Manager

Process Monitor

Run

Import Parameters

☒ Wage System Tables

Files with Implied Decimal (9999v99)

Default Standard Hours:

40.00

Exchange to Currency:

USD Dollar

Input Filename:

N://PAYROLL/ADJUSTMENTS/MAY2008

Next Scheduled Pay Adjustment:

06/27/2008

Optional

Salary Matrix Code:

Informational Use Only

Associate an Agency with Pay Plans and Tables:

Company:

GBI

Global Business Institute 9999

Load Salary Tables USF page

- Wage System Tables

Select this check box if you want the system to import information from the tables containing data for wage system employees.
- Input Filename

Enter the path to the file from which you want to load salary table information.
- Next Scheduled Pay Adjustment

Select or enter the date of the next scheduled pay adjustment.

Salary Matrix Code	Select the salary matrix code. Salary matrices define the common characteristics of a salary plan.
Company	Select the name of the company for which you want to load salary table information.

Entering Designated Agent Information

Access the Designated Agents page (Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Designated Agents USF).

Designated Agents

Designated Agent Code: 4441

Designated Agents USF Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active

Description: Designated Agent

Contact Name: c/o Mary McFarland

Country: USA United States

Address: 1111 Constitution Ave, NW
Room 1214 HQ
Washington, DC 20018

Edit Address

Designated Agents page

Note. In the Payroll Interface application on the Payroll Options 2 page, you can enter a different location code to use as a sort option for printing checks. In this case, the system uses the designated agent address and transmits the check for office delivery. If you select the Other Location option, you also must select a setID and a location code. On the Address Information page in Workforce Administration, the designated agent identifies the person designated in the employee's agency to whom the employee's check is mailed. This value is prompted from the Designated Agent table.

Description	Enter <i>Designated Agent</i> in this field.
Contact Name	Enter the name of the person to whom you want the company to send your paycheck.
Country	Select the country in which the address is located.

Address

Displays the address where the paycheck will be sent.

Edit Address

If you are entering a new address or if the page is in correction mode, the system activates this button. Click it to enter a new address or overwrite the old one.

Chapter 10

(JPN) Updating Salaries for Japan

This chapter provides an overview of Japanese salary updating methods and discusses how to:

- Update salaries by step increase.
- Update salaries by salary amount increase.
- Update salaries by percentage.

Understanding Updating Salaries for Japan

The methods for updating salaries in Japan involve some functionality-specific setup and, depending on the salary increase method your organization uses, some or all of the following:

- Calculation of increases based on worker review results.
- Simulation of salary increases and manual adjustments.
- Loading of salary increases to worker job compensation records.

The three salary increase methods are:

- Step increases
- Amounts
- Percentages

The final processes associated with each of these methods produce new compensation records for each worker with an action of *Pay Rt Change* (pay rate change) and a reason of *Salary Increase by Step*, *Salary Increase by Amount*, or *Salary Increase by Percent*.

All the salary increase processes include worker review results in their calculation. Because review IDs are actually effective dates and the system automatically retrieves the results of the latest salary review after you specify the review ID for the process, you can be sure the system will use correct review results.

Prerequisites

All three salary increase methods must be based on worker reviews that have been resolved into a review band, meaning that worker reviews for these salary increase methods must be based on a review rating scale that has a scale type of *Review Band*.

Load Process

The load processes that are associated with each of the three salary increase methods—load steps, load amount, and load percentage increase—include a check of the worker's job record effective dates, action and action reason, and job code. The load process terminates for the worker and reports the worker on the error list if either of these conditions exists:

- A job row has an effective date equal to the Salary Increase Date that you set, and the action and reason combination is *Promotion* and *Salary Grade Advance*.
- A job row has an effective date equal to the Salary Increase Date that you set, and the Job Code for that effective-dated job row differs from the Job Code for the previous effective-dated job row.

Common Elements Used in This Section

Language	Required because, although this batch process is a load process, an error list may occur, which you need to read.
SetID	Enter the setID for the review ID that the system should use to calculate the worker's review-based salary increase. Because you can link a single review ID to multiple setIDs, you must identify the review by its setID and its own ID.
Review ID	Enter the ID of the review on which the selected process is to base its load.

Updating Salaries by Step Increase

To update salaries by step increase use the Step Increase JPN (STEPINC_TBL_JPN_GBL) component.

This section provides an overview of the step increase process and discusses how to:

- Set up step increases.
- Process step increases.

Understanding the Step Increase Process

Updating salaries by step increase requires that you set up a Step Increase table in which you associate several salary steps with a review band. Each worker's review band is derived from the points awarded by single or multiple reviewers using weighted or nonweighted reviews. After you have the salary step increase for each review band and each worker's review band, you can run a process to load the salary step increases for each worker.

Note. To run the update process for this method of salary increase, select the Multi-Step Grade check box on the Installation Table - HRMS Options page.

To update salaries by step increase:

1. Set up review bands and the number of steps to increase.
2. Run the JPN Load Salary Steps process.

Pages Used to Update Salaries by Step Increase

Page Name	Definition Name	Navigation	Usage
Define Step Increase	STEPINC_TBL_JPN	Compensation, Base Compensation, Step Increase JPN, Define Step Increase, Define Step Increase	Associate several salary step increases with a rating model and review rating.
Load Salary Steps	RUN_STEP_JPN	Compensation, Base Compensation, Step Increase JPN, Load Salary Steps, Load Salary Steps	Update the salary step and associated compensation on the job record for workers who have a fixed amount Plan/Grade/Step-based salary component.

Setting Up Step Increases

Access the Define Step Increase page (Compensation, Base Compensation, Step Increase JPN, Define Step Increase, Define Step Increase).

Define Step Increase

Effective Date: 01/01/1990 *Status: Active

Step Increase Table Customize | Find | View All | First 1-5 of 5 Last

	*Rating Model	Short Description	*Review Rating	Short Description	Increase Steps		
1	JB01	GA Band	A	Band A	4	+	-
2	JB01	GA Band	B	Band B	3	+	-
3	JB01	GA Band	C	Band C	2	+	-
4	JB01	GA Band	D	Band D	1	+	-
5	JB01	GA Band	S	Band S	5	+	-

Define Step Increase page

Rating Model and Review Enter the rating model and review rating.
Rating

Number of Steps to Increase

Enter the number of salary step increases to associate with the rating model that you entered. Workers in this rating model receive the salary that is associated with the step to which they move. For example, if they increase three steps for being in Rating Model A, then they increase from the salary for Step 2 to the salary for Step 5.

Processing Step Increases

Access the Load Salary Steps page (Compensation, Base Compensation, Step Increase JPN, Load Salary Steps, Load Salary Steps).

Load Salary Steps

Run Control ID: PS

Report Manager

Process Monitor

Run

Language: English

Selection Criteria

*Calculation As Of Date:

31

*Salary Increase Date:

31

*Set ID:

SHARE

*Review ID:

Group ID

Find | View All | First | 1 of 1 | Last

Group ID

Description

Load Salary Steps page

- Calculation As Of Date

The effective date the system uses to determine which job compensation record it should use to obtain the worker's current data to calculate the new data. For example, if the worker's review band earns the worker a three-step increase, the system must use the existing step to calculate the new step.
- Salary Increase Date

This value becomes the effective date of the new job record that the system inserts for the worker for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Step*, respectively.
- Group ID

Enter specific groups for the system to process. If you select no groups, the system processes all workers with a salary plan, grade, and step in their compensation record and a compensation rate code that is defined in the Salary Rate Code table.

Updating Salaries by Salary Amount Increase

To update salaries by salary amount increase, use the Salary Increase Amount JPN (SALINC_AMT_TBL_JPN_GBL) component.

This section provides an overview of the salary amount increase process and discusses how to:

- Set up salary amount increases.
- Process salary amount increases.

Understanding the Salary Amount Increase Process

Using the updating salaries by salary amount increase method requires that you set up a Salary Increase Amount table in which you associate a compensation rate code with review bands and monetary increase amounts with each review band. Each worker's review band is derived from the points awarded by single or multiple reviewers using weighted or nonweighted reviews. After you have the salary increase amount for each review band and each worker's review band, you can run a process to load the salary increase for each worker.

When you set up the Salary Increase Amount table, you can select only compensation rate codes that are flat amount types and not of class *GRPPAY* or *SENPAY*.

To update salaries by salary amount:

1. Set up rate codes, review bands, and increase amounts.
2. Run the JPN Load New Salary Amount process.

Pages Used to Update Salaries by Salary Amount Increase

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Salary Increase Amount	SALINC_AMT_TBL_JPN	Compensation, Base Compensation, Amount Increase JPN, Define Salary Increase Amount, Define Salary Increase Amount	Define the salary increase amount for a particular compensation rate code, rating model, and review rating.
Load Salary Increase	RUN_UPSALAMT_JPN	Compensation, Base Compensation, Amount Increase JPN, Load Salary Increase, Load Salary Increase	Execute the salary update process using the values that you set up in the Sal Inc Amount table.

Setting Up Salary Amount Increases

Access the Define Salary Increase Amount page (Compensation, Base Compensation, Amount Increase JPN, Define Salary Increase Amount, Define Salary Increase Amount).

Define Salary Increase Amount

Compensation Rate Code: KJ0001

Salary Increase Amount Table Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1980 31 *Status: Active + -

Description: Base Salary Japan

Currency Code: JPY

Frequency: Monthly

Salary Increase Details Customize | Find | View All | First 1-5 of 5 Last

	*Rating Model	Short Description	*Review Rating	Short Description	Amount of Salary Increase		
1	KJ01	Japan RM	A	Vry Gd	18,000.000000	+	-
2	KJ01	Japan RM	B	Good	15,000.000000	+	-
3	KJ01	Japan RM	C	Fair	12,000.000000	+	-
4	KJ01	Japan RM	D	Poor	9,000.000000	+	-
5	KJ01	Japan RM	S	Outstn	20,000.000000	+	-

Define Salary Increase Amount page

Enter the compensation rate code whose value you are updating. The compensation rate code must *not* be of class *SENPAY* and must be of type *Flat Amount*.

Rating Model and Review Rating Enter the rating model and review rating for which to enter a salary increase amount.

Amount of Salary Increase Enter the amount of the salary increase for workers whose review results put them in the rating model that you specified.

Processing Salary Amount Increases

Access the Load Salary Increase page (Compensation, Base Compensation, Amount Increase JPN, Load Salary Increase, Load Salary Increase).

Load Salary Increase

Run Control ID: PS

Report Manager

Process Monitor

Run

Language: English

Salary Increase Parameters

*Calculation As Of Date: 31

*Salary Increase Date: 31

*Set ID: SHARE

*Review ID:

Rate Code

Find | View All | First 1 of 1 Last

*Rate Code

Short Descr

Currency

Comp Freq

+ -

Group ID

Find | View All | First 1 of 1 Last

Group ID

Short Descr

+ -

Load Salary Increase

- Calculation As Of Date

The effective date that the system uses to determine from which job compensation record it should get the worker's current data to calculate new data. For example, if the worker's review band earns the worker an increase, the system must get the existing rate code amount to calculate the new rate code amount.
- Salary Increase Date

Becomes the effective date of the new job record that the system inserts for the worker for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Amount*.
- Rate Code

Enter the rate codes for which you defined a salary increase to include in this load process. The system displays the short description, currency, and compensation frequency associated with each rate code.

Note.

You defined your salary increases by compensation rate code and review band. You can run the process for multiple rate codes.
- Group ID

Enter group IDs for workers to be included in this process. Leave this blank to have job compensation records updated for all workers who have the rate code that you specified. If a worker in a group that you specify does not have the compensation rate code that you specified for processing, the system skips the worker without processing.

Updating Salaries by Percentage

To update salaries by percentage, use the Salary Increase ID JPN (SALINC_ID_TBL_JPN_GBL) and Salary Increase Matrix JPN (SALARY_MATRIX_JPN_GBL) components.

This section provides an overview of the update salaries by percentage process and discusses how to:

- Define salary increase IDs.
- Process salary increases.
- Run a salary increase simulation.
- Run the salary simulation report.
- Load salary increases.

See Also

Chapter 10, "(JPN) Updating Salaries for Japan," page 189

Understanding the Update Salaries by Percentage Process

To use the updating salaries by percentages method, which includes a simulation process that shows the effects of various increase options, you set up two tables: the Salary Increase ID table and the Salary Increase Matrix table. In the Salary Increase ID table, you specify a single compensation rate code, which must be of class *Defined Range Pay (DFRPAY)* and of type *Flat Amount*. You then run the simulation process, which, like other methods, uses review results in its calculation. You can adjust the result of the simulation for workers, by increasing or decreasing it, and view the overall results—the totals—online. When you are satisfied with the results, you run a second process, similar to the processes that conclude the other methods, to load the salary increase amounts to the workers' job compensation records.

Note. To use this salary increase method, select the Defined Range check box on the Calculation Rule Settings JPN page.

You complete these steps to update salaries by percentage:

1. Define a Japanese salary increase ID.
2. Set up a Japanese salary increase matrix.
3. Run the Run Salary Inc Table process.
4. Run the salary increase simulation and adjust as required.
5. Run the load salary increase process.

Pages Used to Update Salaries by Percentage

Page Name	Definition Name	Navigation	Usage
Define Salary Increase ID	SALINC_ID_TBL_JPN	Compensation, Base Compensation, Percentage Increase JPN, Define Salary Increase ID, Define Salary Increase ID	Define a salary increase ID and associate a rate code, which must be of class <i>DFRPAY</i> and of type <i>Flat Amount</i> , and worker groups with it. You run the salary increase simulation by salary increase ID.
Define Salary Increase Matrix	SALARY_MATRIX_JPN	Compensation, Base Compensation, Percentage Increase JPN, Define Salary Increase Matrix, Define Salary Increase Matrix	Establish the fixed percentage increase for each review rating by quartile. The fields on this page are identical to those on the Define Salary Increase Matrix Table page.
Generate Salary Increase Data	RUN_CMPCALC_JPN	Compensation, Base Compensation, Percentage Increase JPN, Generate Salary Increase Data, Generate Salary Increase Data	Enter the parameters for running the salary increase process and populating the Salary Increase Simulation table.
Simulate Salary Increase	SALINC_SIML_JPN	Compensation, Base Compensation, Percentage Increase JPN, Simulate Salary Increase	View the results of running the simulation process. All fields in the results grid are display-only, except for the Adjustment Amount field on the Changes tab, in which you can adjust the amount of an individual's salary increase.
Salary Simulation Report	RUN_SALREPORT_JPN	Compensation, Base Compensation, Percentage Increase JPN, Salary Simulation Report, Salary Simulation Report	Run the (JPN) Salary Simulation report (CMP020JP) that displays the results of the Salary Increase Simulation process.
Load Salary Increase	RUN_UP_SALINC_JPN	Compensation, Base Compensation, Percentage Increase JPN, Load Salary Increase, Load Salary Increase	Update worker job compensation records with the results of the salary increase and adjustment results.

Defining Salary Increase IDs

Access the Define Salary Increase ID page (Compensation, Base Compensation, Percentage Increase JPN, Define Salary Increase ID, Define Salary Increase ID).

Define Salary Increase ID

Salary Increase ID:

KJ01

*Description:

Salary Increase Simulation

*Calculation As Of Date:

04/01/2000

31

*Salary Increase Date:

04/01/2000

31

*Set ID:

JPN01

*Review ID:

KJ02

Salary Review for FY1999

*Comp Rate Code:

KJ0003

Base Salary 2 Japan

*Apply Rounding At:

Units

*Rounding Rule:

Round Up

Group ID

Customize | Find | View All | 1 of 1 | First | Last

	*Group ID	Description		
1	KJ001	Sal Plan KJ11 Grades 6,7,8	+	-

Define Salary Increase ID page

- Calculation As Of Date

Enter the effective date that the system uses to determine from which job compensation record it should get the worker's current data to calculate new data. For example, if the worker's review band earns a worker a 6 percent increase, the system must get the existing rate code amount to calculate the new rate code amount.
- Salary Increase Date

Enter the effective date of the new job record that the system inserts for the worker for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Percentage*.

Comp Rate Code (compensation rate code)	<p>Enter the rate code. It must be of the class <i>Defined Range Pay (DFRPAY)</i> and of the type <i>Flat Amount</i>.</p> <p>You can add only one compensation rate code for each salary increase ID, and only one salary increase ID is associated with each simulation run. To run a simulation for a different compensation rate code, you must define additional salary increase IDs.</p> <hr/> <p>Note. You cannot have more than one rate code of class <i>DFRPAY</i> on a single worker's Job Data - Compensation record.</p> <hr/> <p>The process that populates the Salary Increase Simulation table includes all workers in the groups that you specify who have this compensation rate code as well as the currency code and frequency set in the Compensation Rate Code table for this rate code.</p> <p>If you have changed the default currency code or frequency from that set on the compensation rate table in the workers' job compensation record, then those workers go into error and are not included in the simulation.</p>
Apply Rounding At	Select the numerical "place" at which to apply the rounding rule you select.
Rounding Rule	<p>Select the rounding rule for the simulation process based on this salary increase ID. Options are:</p> <ul style="list-style-type: none"> • <i>Round</i> • <i>Round Down</i> • <i>Round Up</i>
Group ID	<p>Enter the group IDs for the workers being included in this process.</p> <p>You must enter at least one group ID to complete this process. If a worker in a group that you specify does not have the compensation rate code that you specified for processing, the system skips the worker without processing.</p> <hr/> <p>Note. This salary update method retrieves the required percentage increase from the salary matrix table where you linked review bands to percentage increases, quartile by quartile.</p> <hr/>

Processing Salary Increases

Access the Generate Salary Increase Data page (Compensation, Base Compensation, Percentage Increase JPN, Generate Salary Increase Data, Generate Salary Increase Data).

Generate Salary Increase Data

Run Control ID: PS

Report Manager

Process Monitor

Run

Language: English

Salary Increase Parameters

*Salary Increase ID: KJ01

Salary Increase Simulation

*Calculation Number: 1

☐ Select All Groups

Group ID

Find | View All | First 1 of 1 Last

*Group ID	Description	
KJ001	Sal Plan KJ11 Grades 6,7,8	<div>+ -</div>

Generate Salary Increase Data page

- Salary Increase ID

Enter the salary increase ID for which to run the simulation.
- Calculation Number

Enter the number that identifies a particular simulation in a series that you might run for comparison purposes.
- Select All Groups

Select to have the system populate the Group ID group box with all groups that you originally associated with this salary increase ID.
- Group ID

If you do not want to run the simulation for all the groups that you associated with this salary increase ID, deselect the Select All Groups check box and enter only those groups to process.

Note. This process includes only workers with the single compensation rate code that is associated with the salary increase ID, but only if their currency code and frequency are the same as the compensation rate code default.

If you try to run a simulation with a combination of salary increase ID, calculation number, and group ID for which results exist, you get a warning. If you proceed, the results of the previous simulation are overwritten. To add groups to or remove them from an existing simulation and maintain the results of the previous simulation, change the calculation number.

Running a Salary Increase Simulation

Access the Simulate Salary Increase page (Compensation, Base Compensation, Percentage Increase JPN, Simulate Salary Increase).

Name and EmplID (employee ID)	Enter this information for a single worker if you are viewing and possibly adjusting simulation results for one person.
Search Result Message	Displays the range showing on the page and the total of the search results.

Sort Group By

EmplID (employee ID) and Name	Select to have the grid display simulation results by worker ID or worker name, respectively.
--	---

Simulation Statistics

The (bracketed) number for each Total field is used in the field description to identify where the derived results come from. The Amounts and Adjustments tabs indicate on which page the column appears.

Total Current Amount (1)	The total of the Amount Before Salary Increase column (Amounts).
Total Adjusted Amount (2)	The total of the Adjustment Amount column (Adjustments).
Average Percent Increase (3)	The average of the Salary Increase Percent column (Amounts) (or 5/1).
Adjusted Average Percent (4)	The average of the Adjusted Sal Inc Percent column (Adjustments) (or 6/1).
Total Calculation Incr Amount (total calculation increase amount) (5)	The total of the Amount of Salary Increase column (Amounts) (or 1 × 3).
Total Actual Increase Amount (6)	The Total Calculation Incr (increase) Amount plus Total Adjustment Amount (or 5 + 2).
Total Calculation New Amount (7)	The total of the New Salary Amount column (Adjustments) (or 1 + 5).
Total Actual New Amount (8)	The total of the Adjusted Salary Amount column (Adjustments) (or 7 + 2).

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the horizontal scroll bar for the page to view all available columns.

Salary Details Tab

EmplID (employee ID)	The system displays the IDs of all the workers in the group that you entered to access this page. You can have the display sorted by this first column. The worker ID is repeated on all the pages of this component.
-----------------------------	---

Name	The system displays the names of all the workers in the group that you entered to access this page. You can sort the display by this column.
Empl Rcd Nbr (employment record number)	The system displays each employment record number if it is not 0. Blank equals record number 0, which means that the worker has only one employment record.
Comp Rate Code (compensation rate code)	The compensation rate code associated with this salary increase ID.
Compensation Eff Sequence (compensation effective sequence)	The system displays the compensation effective sequence that comes from the worker's compensation record in the Job record.

Amounts Tab

Amount Before Salary Increase	The worker's salary before the simulation was run.
Review Band	The system displays the review band that the worker's review results indicate. The salary increases come from the increase percentages that you linked to review bands in the Salary Increase Matrix table.
Salary Increase Percent	The increase in salary, expressed as a percentage of the Amount Before Salary Increase.
Amount of Salary Increase	The amount by which the Amount Before Salary Increase is increased as a result of running the salary increase process.

Adjustments Tab

New Salary Amount	The system displays the amount of the salary after the simulated increase: the Amount Before Salary Increase (Amounts) plus the Amount of Salary Increase.
Adjustment Amount	<p>The only field available for entry in the otherwise display-only grid. Manually adjust the New Salary Amount by adding or subtracting an adjustment amount.</p> <hr/> <p>Note. If you change the value in this field, save before you move to the next set of records using the navigation buttons below the calculation number. If you do not save, you receive a warning that your changes will not be stored.</p> <hr/>
Adjusted Salary Amount	The system updates this field online according to any adjustments that you make. This value is the new salary amount after adjustment or the New Salary Amount plus or minus the Adjustment Amount.
Adjusted Sal Inc Percent (adjusted salary increase percentage)	<p>The system updates this field according to any adjustments that you make. This value is the salary increase percentage after adjustment, calculated by:</p> $(\text{Adjusted Salary Amount} / \text{Amount Before Salary Increase} - 1) \times 100.$

Running the Salary Simulation Report

Access the Salary Simulation Report page (Compensation, Base Compensation, Percentage Increase JPN, Salary Simulation Report, Salary Simulation Report).

Salary Simulation Report

Run Control ID: PS

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Salary Increase Parameters

*Salary Increase ID:

*Calculation Number:

☐ Select All Groups

Group ID

Find | View All | First | 1 of 1 | Last

Group ID	Description

Salary Simulation Report page

- Salary Increase ID

Enter the salary increase ID you ran the simulation for and for which you want the results reported.

Calculation Number

Enter the calculation number of the particular simulation you want reported.

Select All Groups

Select this check box if you want the system to populate the Group ID section with all the groups you originally associated with the Salary Increase ID.

Group ID

If you do not want to run the simulation for all the groups that you associated with this salary increase ID for this calculation number, deselect the Select All Groups check box and enter only groups that you want to process.

Loading Salary Increases

Access the Load Salary Increase page (Compensation, Base Compensation, Percentage Increase JPN, Load Salary Increase, Load Salary Increase).

Load Salary Increase

Run Control ID: PS

Report Manager

Process Monitor

Run

Language: English

Selection Criteria

*Salary Increase ID:

*Calculation Number:

☐ Select All Groups

Group ID

Find | View All | First 1 of 1 Last

Group ID

Description

+

-

Load Salary Increase page

- Salary Increase ID

Enter the salary increase ID for which you ran the simulation and for which the results are to be loaded to worker job compensation records.
- Calculation Number

Enter the calculation number of the particular simulation results to be loaded.
- Select All Groups

Select to have the system populate the Group ID section with all the groups that you originally associated with this salary increase ID and calculation number combination.
- Group ID

If you do not want to run the simulation for all the groups that you associated with this salary increase ID for this calculation number, deselect the Select All Groups check box and enter only groups that you want processed.

Chapter 11

(FRA) Forecasting Salaries for France

This chapter provides overviews of salary forecasting and technical details, lists common elements, and discusses how to:

- Define periods.
- Set up events.
- Define scenarios.
- Forecast compensation.
- Purge scenario history.
- View scenario history.

Understanding Salary Forecasting

Use Salary Forecasting, a French-specific business process, as an analysis tool or as a forecasting tool. Either analyze the changes in compensation for a group of workers in past periods or simulate how hypothetical events occurring in the future will affect compensation. Because you can see how various events affect your compensation package, this business process is useful for human resources managers or executives wanting to build compensation budgets.

Salary Forecasting is compliant with the rules of the French Analysis Method for compensation variations, called *La Masse Salariale*. The analysis method that the business process employs enables you to calculate independently the effects of any compensation decisions for a group of workers for a future time period. The reports provided are also in accordance with *La Masse Salariale*.

The steps for using the Salary Forecasting business process are:

1. Set up your data.
2. Run the calculations.
3. Run and view the reports.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports," PeopleSoft HRMS Reports: Selected Reports

Setting Up Salary Forecasting

If you use the Salary Forecasting business process for forecasting purposes, then set up events for modeling the future compensation.

If you use the business process for comparison of two past periods, then do not set up any events. Note that the calculation process ignores events defined in past periods.

Complete these steps to set up salary forecasting:

1. Define, one at a time, two like periods of time.

These time periods can be past, current, or future. Usually, you compare two equivalent periods of time, referred to as the *reference* and the *analysis* periods.

2. Associate the periods for comparison or forecasting.

3. Define groups, if they are not already created.

Define worker groups using the Group Build module. Each person defined in a group used in the Salary Forecasting business process must have, in his or her compensation package, rate codes attached to a rate code class. Use the rate codes without rate code class report to verify.

4. Define the various events that you want to apply to the worker groups whose compensation you want to analyze and forecast.

The events can be of various types, as described in the next section. You might also define additional setup data such as proration rules or specific hours rate.

5. Ensure all events for one scenario have the same elementary period.

6. (Optional) Define your proration rules.

7. (Optional) Define your rates for hours worked.

8. Group events into a scenario.

At the scenario level, define a set of events to apply to groups of workers for a given time period.

See Also

Chapter 11, "(FRA) Forecasting Salaries for France," Understanding Technical Details, page 206

Understanding Technical Details

This section discusses technical details for:

- Compensation effects.
- Categorization of events.

Technical Details: Compensation Effects

The following topics describe the effects in *La Masse Salariale* method of analysis.

Level Effect

Any compensation measure that increases the level of compensation as of a certain date has a level effect. Any compensation increase of the elements of base pay has a level effect.

Mass Effect

Any compensation increase, either an increase in base compensation or any type of variable compensation, has a mass effect. It affects the average compensation for the period and population being considered.

Considering any given period of time and any compensation measure that has a level effect, the sooner in the period the measure is applied, the greater the mass effect for that measure.

Carry Over Effect

The carry over effect represents the effect on a given period of all the measures taken during the previous period. For any compensation measure that has a level effect, the later this measure is applied in a given time period, the bigger the carry over effect on the next time period.

Average Compensation for Employees in Place

The overall compensation for an organization could change between two consecutive periods for several reasons:

- Compensation increases given to a subgroup or to the entire organization.
- Seniority changes due to the overall aging of the population.
- Hires and departures within the organization.
- Moves within the organization that trigger changes in compensation, such as promotions.

Average compensation for employees in place (ACEP) is the average compensation for the subset of people within the organization during two consecutive time periods.

Headcount Effect

The headcount effect is the variance of the headcount multiplied by the variance of the average compensation.

Structure Effect

The structure effect is the variance in the overall compensation due to internal moves within the organization.

Noria Effect

The Noria effect is defined as the consequence of changes in compensation due to hiring and departures. Often, the salaries of the newly hired are below those of workers who have been at the same job longer. The Noria effect tracks the differences.

Overall Variance of Compensation Between Two Time Periods

The calculation is as follows:

ACEP variance + Headcount effect + Structure Effect + Noria Effect

All variances and effects are expressed in percentages (refer to Report LMS001).

Technical Details: Categorization of Events

All events are classified in predefined categories by the Forecast Compensation module calculation process. Those categories are the ones commonly used for *La Masse Salariale* analysis. The category codes and descriptions are delivered as system data.

This table displays *La Masse Salariale* categorization and the corresponding category codes that are used by the calculation process to map the events defined at the scenario level with the categories:

Category	Category Code
General Increases	C20
General Increases given as a percentage	C21
General Increases given as a Amount or Points changes	C22
Measures by Category	C30
Bonus	C40
Regular Bonus	C41
Exceptional Bonus	C42
Individual Measures	C50
Seniority	C51
Shift-Technicality	C52

Category	Category Code
Activity	C53

The following matrix displays which events affect which categories.

Event	Category/ Rate Code Class	C 20	C 21	C 22	C 30	C 40	C 41	C 42	C 50	C 51	C 52	C 53
Leave		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Promotion	Base Pay								*		*	
	Reg Bonus					*	*					
	Seniority Bonus								*	*		
Salary Increase	Base Pay	*	*	*	*				*		*	
	Reg Bonus					*	*					
	Seniority Bonus								*	*		
Seniority	Seniority Bonus								*	*		
Working Schedule	Base Pay								*			*
	Reg Bonus					*	*					
	Seniority Bonus								*	*		

<i>Event</i>	<i>Category/ Rate Code Class</i>	<i>C 20</i>	<i>C 21</i>	<i>C 22</i>	<i>C 30</i>	<i>C 40</i>	<i>C 41</i>	<i>C 42</i>	<i>C 50</i>	<i>C 51</i>	<i>C 52</i>	<i>C 53</i>
Entry		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Incentive	N/A					*		*				

Common Elements Used in This Chapter

Period Types

Four period types define the periods of comparison:

- Month
- Quarter
- Semester (six months)
- Year

Periods or Periods of Comparison

Periods, or periods of comparison, are the periods being compared. Use salary forecasting in two ways: to analyze two past periods or to forecast a future period, using the current period as a base.

Reference Period

For forecasting, this period is likely to contain the current date. For comparing past periods, use any period as a basis for comparison

Analysis Period

For forecasting, this is a future period contiguous with the reference period. For comparing past periods, this period must be contiguous with and prior to the reference period.

Type of Elementary Period

How often the module processes its calculations.

These elementary period types coincide with your possible payroll dates:

- Monthly
- Semi-monthly (more accurate but takes more processing time)

Suppose that you select Year as the period type and semi-monthly as the elementary period type. The module makes 24 calculations. If you select Monthly as the elementary period type, the module makes 12 calculations.

Select the elementary period type when you define events.

Elementary Periods	<p>The monthly or semi-monthly segments of a comparison period. Whether the segments are monthly or semi-monthly is determined by the selected elementary period type.</p> <ul style="list-style-type: none"> • Past Elementary Period: any elementary period that is prior to and does not contain the current date (date of processing). • Current Elementary Period: The elementary period that contains the current date (date of processing). • Future Elementary Period: any elementary period that has its start date greater than the current date. <p>The process manages the current elementary period exactly the same way it manages any past elementary period. The process manages future elementary periods by copying the data calculated for the current elementary period.</p>
Triggering Period	The date the event is to occur (or trigger) within the analysis period.
Working Periods	<p>The two periods (always one analysis and one reference) that you associate for either comparing or forecasting. They are defined by a Working Period ID.</p> <p>These rules apply to the two periods associated as working periods:</p> <ul style="list-style-type: none"> • The two periods must have the same period type. • The two periods must be contiguous, for example, 1994 and 1995, this year and next year, this month and next month. • No time periods can overlap. <p>When using the Salary Forecasting module to analyze the future, use the present as the reference period. This rule is true for all period types: analyze this year against next year, this month against next month, and so on.</p>
Working Periods ID	A value that must be the same for all events in a scenario.
Event ID	Identifies a compensation event in the system. You enter one for each event that you define.
Event Type	Select one of the following: <i>Headcount Increase</i> , <i>Headcount Decrease</i> , <i>Compensation Increase</i> , <i>Promotion</i> , <i>Seniority Increase</i> , <i>Incentives</i> , and <i>Working Schedule</i> .

Defining Periods

To set up periods, use the Period Setup panel (LMS_PERIOD_PNLGP_GBL) and Working period setup panel (LMS_WRK_PD_PNLGP_GBL) components.

This section discusses how to associate contiguous working periods.

Pages Used to Define Periods

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Period Setup panel	LMS_PERIOD_DEFN	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Period Setup panel, Period Setup panel	Define the time periods to compare and analyze compensation. Each time period is a Time Period ID.
Working Periods	LMS_WRK_PD_DEFN	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working period setup panel, Working Periods	Associate two contiguous time periods. If you analyze two past periods, do not include the current period. If you forecast for the future, the reference period is the current period.

Associating Contiguous Working Periods


Access the Working Periods page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working period setup panel, Working Periods).


Working Periods

Working Periods ID: 2000-2001

Description: Year 2000 and Year 2001

Short Description: 2000-2001

***Reference Period:** KF2000  Year 2000
01/01/2000 / 12/31/2000

***Analysis Period:** KF2001  Year 2001
01/01/2001 / 12/31/2001

Working Periods page

Reference Period

For forecasting, select the current period—Month, Quarter, Semester or Year—depending on what period type you selected on the Period Setup panel page. For comparing past periods, select any past period.

Analysis Period

For forecasting, this value must be a future period contiguous with the reference period, and of the proper length for the period type. For comparing past periods, select any past period contiguous with the reference period. The system ensures that the reference and analysis periods do not overlap, that they are contiguous, and that they are of the same type.

Setting Up Events

To set up events, use the Headcount increase setup panel (LMS_ENTRIES_EVENT_GBL), Incentive event setup panel (LMS_INCENT_EVENT_GBL), Salary Increase event setup (LMS_INCREASE_EVENT_GBL), Headcount decrease event setup (LMS_LEAVES_EVENT_GBL), Promotion event setup panel (LMS_PROMO_EVENT_GBL), Seniority Setup panel (LMS_SENIOR_EVENT_GBL), Working Schedule event setup (LMS_SCHEDULE_EVENT_GBL), Proration setup panel (LMS_PRORATION_GBL), and Hours rate setup panel (LMS_HOURS_RATE_GBL) components.

An event is an action (or a set of actions) applied to a group of workers. Events are the building blocks of your scenarios. You define and reuse events in many scenarios as long as the scenarios apply to the same set of time periods. This section discusses how to:

- Simulate a headcount increase.

Add workers to any group (by job code or position) to simulate hiring or to study the effects of proposed organizational changes.

- Simulate future awards.

This simulation enables you to see the effect of awarding a lump sum amount at a specific point in time. The incentive event is simplistic here because the Variable Compensation module offers a more complex simulation. The Variable Compensation module enables you to perform different scenarios to determine the maximum, target, and minimum awards for a group of workers based on a given plan of specific business rules.

- Simulate a compensation increase event.
- Simulate a headcount decrease.
- Simulate a promotion.

A promotion is defined as a move from one Job Code to another Job Code.

- Simulate seniority.

This simulation shows the effect of seniority increases.

- Define a working schedule.

A working schedules event determines the effect of changing the working schedule for a group of workers.

- Define proration rules.
- Define hours rates.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation, "Understanding Variable Compensation"

Pages Used to Set Up Events

Page Name	Definition Name	Navigation	Usage
Headcount Increases	LMS_ENTRIES	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount increase setup panel, Headcount Increases Compensation, Forecast Compensation FRA, Define Forecast Data, Headcount Increases 	Define a Headcount Increase event.
Additional Simulation Parameters	LMS_ENTRIES_SEC	Click Simulation Parameters link on the Headcount Increases page	Define additional parameters if the selected job code or position has compensation packages containing pay components expressed either in points or in a weekly frequency. Define the standard hours per standard work period or the points value and currency required by the calculation process for correctly handling the conversion of those pay components.
Incentives	LMS_INCENTIVES	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Incentive event setup panel, Incentives Compensation, Forecast Compensation FRA, Define Forecast Data, Incentives 	Set up a future award for a group.

Page Name	Definition Name	Navigation	Usage
Compensation Increases	LMS_INCREASE	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Salary Increase event setup, Compensation Increases Compensation, Forecast Compensation FRA, Define Forecast Data, Compensation Increases, Compensation Increases 	Define a compensation increase event.
Headcount Decreases	LMS_LEAVES	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount decrease event setup, Headcount Decrease Compensation, Forecast Compensation FRA, Define Forecast Data, Headcount Decreases, Headcount Decreases 	Define a headcount decrease event.
Promotions	LMS_PROMOTION	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Promotion event setup panel, Promotions Compensation, Forecast Compensation FRA, Define Forecast Data, Promotions 	Simulate promotions for all people in a group.
Seniority	LMS_SENIORITY	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Seniority Setup panel, Seniority Compensation, Forecast Compensation FRA, Define Forecast Data, Seniority 	Define a seniority event.

Page Name	Definition Name	Navigation	Usage
Working Schedule	LMS_WRK_SCHEDULE	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working Schedule event setup, Working Schedule Compensation, Forecast Compensation FRA, Define Forecast Data, Working Schedules, Working Schedule 	Define work weeks for the calculations.
Proration setup panel	LMS_PRORATION	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Proration setup panel, Proration setup panel	Define the proration schemes.
Hours rate setup panel	LMS_HOURS_RATE	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Hours rate setup panel, Hours rate setup panel	Define the overtime rates used for simulating the working schedules event. Use this page only for the Salary Forecasting calculation process.

Simulating Headcount Increase

Access the Headcount Increases page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount increase setup panel, Headcount Increases).

Headcount Increases

Working Periods ID:	2000-2001	Event ID:	KFHDINC01	Event Type:	Headcount Increases
Reference Period:	KF2000	01/01/2000 / 12/31/2000			
Analysis Period:	KF2001	01/01/2001 / 12/31/2001			
Type of Elementary Period:	<input type="text" value="M"/> Monthly		Triggering Period: <input type="text" value="04/01/2001"/>		
Description:	<input type="text" value="Hire of 10 technicians"/>				

Headcount Increase Type

☒ Avg. Amnt. ☐ JobCode ☐ Position

Structure Effect

Group ID:

Number of People:

[Simulation Parameters](#)

Average Amount:

Currency: Monthly

Frequency: Monthly

Headcount Increases page

Headcount Increase Type	Select how you want the calculations to consider the increase: Avg Amnt (average amount): When you select Avg Amnt, these fields appear: Average Amount, Currency, Frequency. Enter a free compensation amount, which is multiplied by the number of people selected. Use this type of headcount increase to perform an estimated simulation. JobCode: Select this option and the SetID and Forecasted Job fields appear. Use this option to add many people with the same job code. The calculation uses the compensation package defined for the specified job code and multiplies it by the number of people selected for the simulation. <hr/> Note. Only those job codes that are <i>not</i> associated with a matrix are available. <hr/> Position: Select this option and the Forecasted Positions field appears. The calculation uses the compensation package defined for the job code associated with the specified position and multiplies it by the number of people selected for the simulation.
Structure Effect	Refer to the Understanding Technical Details topic for the definition of the structure effect. To measure the structure effect, assign your headcount increase to a group. <u>See Chapter 11, "(FRA) Forecasting Salaries for France," Understanding Technical Details, page 206.</u>
Number of People	Enter the number that represents the headcount increase.
Simulation Parameters	Click to enter additional simulation parameters for the calculation process.

Average Amount	When Headcount Increase Type is Avg Amnt, specify the average amount of the salaries for all people added, based on the frequency specified. For example, five new people get 5000.00 EUR (1000.00 EUR each) every other week, so the frequency is bi-weekly. You would enter <i>1000</i> in the Avg Amnt field.
Currency	When Headcount Increase Type is Avg Amnt, select the currency that the calculation process uses.
Frequency	<p>When Headcount Increase Type is Avg Amnt, specify how often the new people are to be paid. During the calculation process, the frequency is converted to match the elementary period type.</p> <p>For example, the elementary period type is monthly, and you enter five new people who get 1000.00 EUR weekly. The system calculates 5000.00 EUR weekly, and then converts it to a monthly frequency using the frequency annualization factor. The monthly figure is 20000.00 EUR. The calculation process adds 20000.00 EUR every month, starting with the triggering period defined for this event.</p> <p>Frequency values come from the Frequency table.</p>
SetID	When Headcount Increase Type is JobCode, specify the setID for the job code for the new hires. These values come from the SetID table.
Forecasted Job	When Headcount Increase Type is JobCode, specify a forecasted job for the new hires. Each job code must have its own event. These values come from the Job Code table.
Forecasted Positions	When Headcount Increase Type is Position, specify a forecasted position for the new hires.

Simulating Future Awards

Access the Incentives page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Incentive event setup panel, Incentives).

Incentives

Working Periods ID:

2000-2001

Event ID:

KFINCENT01

Event Type:

Incentives

Reference Period:

KF2000

01/01/2000 / 12/31/2000

Analysis Period:

KF2001

01/01/2001 / 12/31/2001

Type of Elementary Period:

M

Monthly

Triggering Period:

12/01/2001

Description:

Bonus for Qualified Workers

Number of People:

15

Average Amount:

2000.000000

Currency:

FRF

Structure Effect

Group ID:

KF004

Incentives page

Number of People

Enter the number of people who receive a lump sum incentive award.

Average Amount

Enter the average amount each person is to receive. For example, if you select 5 for the number of people and 500 for the average amount, the calculation adds 5 times 500.00 EUR, or 2500.00 EUR, to the triggering period.

Structure Effect

Enter the Group ID to receive this award. Refer to the Understanding Technical Details topic for information about the structure effect.

See Chapter 11, "(FRA) Forecasting Salaries for France," Understanding Technical Details, page 206.

Simulating a Compensation Increase Event

Access the Compensation Increases page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Salary Increase event setup, Compensation Increases).

Copyright © 1988, 2010, Oracle and/or its affiliates. All Rights Reserved.

219

Compensation Increases

Working Periods ID: 2000-2001 Event ID: KFCMPINC01 Event Type: Increase of component of pay

Reference Period: KF2000 01/01/2000 / 12/31/2000

Analysis Period: KF2001 01/01/2001 / 12/31/2001

Type of Elementary Period: Monthly Triggering Period: 06/01/2001

Description: June General Increase

☐ Individual Measure

Compensation Increase Rate Codes									
SeqNum	Rate Code	Percent Amount	Change Amount	Change Percent	Change Points	Percent of Points	Currency	Rate Code Class	
1	KF0005	3.00					FRF	BASSAL	

Compensation Increases page

Individual Measure

Select if the increase is an individual measure. This check box relates to *La Masse Salariale* method of analysis. It classifies compensation increases into three categories: general increases (applies to the overall simulated population); increases by category (a category being a subset of the overall simulated population); and individual measure (the compensation increase is an increase for an individual).

To simulate general increases, deselect this check box.

See [Chapter 4, "Administering Salary Plans, Grades, and Steps," page 41.](#)

Compensation Increase Rate Codes

Define the rate codes to be increased. All people in a group with a compensation package containing specified compensation rate codes receive the increase that is specified on this page as of the triggering period of this event.

Select the way to change a person's compensation for a given rate code from these choices: Percent Amount, Change Amount, Change Percent, Change Points, Percent of Points, Currency, and Rate Code Class.

Specify any components of pay and any increases. Depending on the component type, fill in the fields as follows. (Fields not related to certain component types are unavailable for selection.)

If the component type is flat amount or hourly, enter either a Percent Amount or a Change Amount.

If the component type is percentage, enter only a Change Percent.

If the component type is points, enter either a Percent of Points or a Change Points.

Simulating a Headcount Decrease

Access the Headcount Decreases page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount decrease event setup, Headcount Decreases).

Headcount Decreases

Working Periods ID:2000-2001

Event ID:KFHDDEC

Event Type:Headcount Decreases

Reference Period:KF2000

01/01/2000 / 12/31/2000

Analysis Period:KF2001

01/01/2001 / 12/31/2001

Type of Elementary Period:

M

Monthly

Triggering Period:

09/01/2001

Description:

Headcount Decrease in September

Headcount Decreases page

Description

Enter a description of the headcount decrease event.
Specify the group to which this event applies on the Scenario Definition page.
For example, if five workers retire as of the date specified by the triggering period, create a group that includes those five workers. At the scenario level, attach this group to the headcount decrease event.

Simulating a Promotion

Access the Promotions page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Promotion event setup panel, Promotions).

Promotions

Working Periods ID:

2000-2001

Event ID:

KFPROM01

Event Type:

Promotion

Reference Period:

KF2000

01/01/2000 / 12/31/2000

Analysis Period:

KF2001

01/01/2001 / 12/31/2001

Type of Elementary Period:

M

Monthly

Triggering Period:

06/01/2001

Description:

Promotion from Assistant to Senior Assistant

From

Set ID:

FRA01

Job Code:

KF0010

To

Set ID:

FRA01

Job Code:

KF0009

Promotions page

- From

Enter values in the SetID and Job Code fields for a group's current position.
- To

Enter values in the SetID and Job Code fields for a group's promoted position.

Simulating Seniority

Access the Seniority page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Seniority Setup panel, Seniority).

Seniority

Working Periods ID:

2000-2001

Event ID:

KFSEN01

Event Type:

Seniority

Reference Period:

KF2000

01/01/2000 / 12/31/2000

Analysis Period:

KF2001

01/01/2001 / 12/31/2001

Description:

Seniority Calculation

Seniority Calculation Freq:

M

Seniority page

Seniority Calculation	Enter either <i>Monthly</i> or <i>Semimonthly</i> for seniority pay.
Freq (seniority calculation frequency)	At the event level, define the frequency of seniority calculation; that is, how often seniority is evaluated.

Defining a Working Schedule

Access the Working Schedule page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working Schedule event setup, Working Schedule).

Working Schedule

Working Periods ID:	2000-2001	Event ID:	KFWRK01	Event Type:	Working Schedule
Reference Period:	KF2000	01/01/2000 / 12/31/2000			
Analysis Period:	KF2001	01/01/2001 / 12/31/2001			
Type of Elementary Period:	M Monthly			Triggering Period:	01/01/2001
Description:	From 39 hours to 35 hours				
Standard Hours:	35.00				
Frequency:	W Weekly				

Working Schedule page

Standard Hours	Enter the number of standard hours per frequency period. For example, 35 hours is standard hours for a weekly frequency. To simulate the effect of a group of people moving from 39 to 35 hours, enter the target frequency (35 hours a week) in this field. The group of people that will change its working schedule is defined at the scenario level.
Frequency	Enter the frequency of the standard hours that you select.

Defining Proration Rules

Access the Proration setup panel page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Proration setup panel, Proration setup panel).

Proration setup panel

Time Period ID: KF2001

Period Type: Year

Type of Elementary Period: Monthly

☐ 12 Months

☒ 13 Months

☐ 14 Months

☐ 15 Months

1st Month: / 13

2nd Month: / 13

3rd Month: / 13

4th Month: / 13

5th Month: / 13

6th Month: / 13

7th Month: / 13

8th Month: / 13

9th Month: / 13

10th Month: / 13

11th Month: / 13

12th Month: / 13

Proration setup panel page

Time Period ID	The system displays the Time Period ID that you entered.
Period Type	The system displays a period type of either <i>Monthly</i> or <i>Semi-Monthly</i> .
Type of Elementary Period	Depending on the combination of period type and type of elementary period that you selected, the system displays fields that enable you to rate how to pay per elementary period.
12 Months	Select to weigh each month equally.
13 Months	Select to weigh one month out of a year twice.
14 Months	Select to weigh one month out of a year three times.
15 Months	Select to weigh one month out of a year four times. The system calculates all the ratios, but you can modify them. For instance, if you select 13 Months, you could weight December twice (default calculation) or half-weight June and December. In this case, you would overwrite the default ratios.

Defining Hours Rates

Access the Hours rate setup panel page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Hours rate setup panel, Hours rate setup panel).

Hours rate setup panel

Hours Rate Effective Date: 01/01/2000

Hours Rates						
Customize Find View All 1-3 of 3 First Last						
*Sequence	From	To	*Frequency	*Rate (%)		
1	0.00	35.00	W	100.00	+	-
2	35.00	43.00	W	125.00	+	-
3	43.00	168.00	W	150.00	+	-

Hours rate setup panel page

Hours Rate Effective Date	Enter the date these rates are effective.
Sequence	These numbers represent the sequence of counting hours. They are automatically generated.
From and To	Enter the first and last number in the range of hours. The first sequence must begin with 0.
Frequency	Enter the valid frequency for this range of hours.
Rate (%)	Enter the percentage rate for each sequence.

Defining Scenarios

To define scenarios, use the Scenario setup panel (LMS_SCENARIO_GBL) component.

This section discusses how to:

- Associate events with a scenario.
- Assess the structure effect.

Pages Used to Define Scenarios

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Scenario Definition	LMS_SCENARIO	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel, Scenario Definition Compensation, Forecast Compensation FRA, Define Forecast Data, Scenarios, Scenario Definition 	Define scenarios. You associate a working periods ID with a group and a set of events.
Structure Effect	LMS_SCENAR_CTG	<ul style="list-style-type: none"> Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel, Structure Effect Compensation, Forecast Compensation FRA, Define Forecast Data, Scenarios, Structure Effect 	Define the groups used to assess the structure effect.

Associating Events with a Scenario

Access the Scenario Definition page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel, Scenario Definition).

Scenario Definition
Structure Effect

Scenario ID: KFSCEN01

*Group ID: KF0006 All employees in Company KF1

*Working Periods ID: 2000-2001 Year 2000 and Year 2001

Description: Simulation of compensation for Year 2001

Scenario Events

Customize | Find | View All | 1-4 of 8 | First | Last

Select	Event ID		Detail	Triggering Period	Group ID	Def	Description		
<input checked="" type="checkbox"/>	KFSEN01	Seniority	Detail		KF0006	Def	Seniority Calculation	+	-
<input checked="" type="checkbox"/>	KFWRK01	Schedule	Detail	01/01/2001	KF0006	Def	From 39 hours to 35 hours	+	-
<input checked="" type="checkbox"/>	KFHDINC01	H Increase	Detail	04/01/2001		Def	Hire of 10 technicians	+	-
<input checked="" type="checkbox"/>	KFPROM01	Promotion	Detail	06/01/2001	KF0006	Def	Promotion from Assistant to Senior Assistant	+	-

Scenario Definition page

Group ID

Enter a value for this scenario. The group could be your whole organization. For calculation performance reasons, create a smaller group that represents your organization in compensation terms or create a group from a certain department.

Working Periods ID

When you select a working periods ID and press TAB to move out of the field, the system displays all events applicable for that working periods ID.

For certain events, you can limit the population for the event by selecting a Group ID.

Note that Scenario *KFSCEN01* applies to all the workers in Group ID *KF0006*.

Scenario Events

All the events defined for this working period ID appear. Each event is listed by Event ID, Triggering Period, and Description. To include the events in calculations, select the corresponding check box. Click the Detail link to go to the Event Definition page to make adjustments to an event. Click the Def. link to go to the Group Definition page and modify a group.

Use the Group ID fields to restrict an event to a subset of the group that is defined in the previous Group ID field. Restrict the population for the following types of events: headcount decrease, promotion, seniority, working schedule. The headcount increase and incentives events do not need a subgroup.

Note. For a compensation increase event, the population to consider is all the workers from the main group (the one defined in the Group ID field at the scenario level) who have, in their compensation package, the compensation rate codes defined in the event.

Assessing the Structure Effect

Access the Structure Effect page (Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel, Structure Effect).

Scenario Definition | **Structure Effect**

Scenario ID: KFSCEN01

Scenario Structure Effect Groups Customize | Find | View All | First 1-6 of 6 Last

*Group ID	Description		
KF0006	All employees in Company KF 1	+	-
KF001	Executives in Company KF 1	+	-
KF002	Managers in Company KF 1	+	-
KF003	Technicians in Company KF 1	+	-
KF004	Qualified Wkrs in Company KF 1	+	-
KF005	Non Qual Wkrs in Company KF 1	+	-

Structure Effect page

Scenario Structure Effect Groups

Define a subgroup of your overall population, which you defined in the first Group ID field on the Scenario Definition page. Enter groups forming a subset of your overall population. Ensure that the groups do not overlap and that the sum of their populations exactly equals the overall population.

For example, organization ABC has several categories of workers: executives, managers, and workers. You want to study how the compensation is changing due to the movement of people from one category to another. The Salary Forecasting module calculates it automatically: Define your overall organization as being all workers in ABC. Then, define three groups to enter on the Scenario Structure Effect page: Group 1 is all executives from ABC, Group 2 is all managers from ABC, and Group 3 is all workers from ABC. Groups 1, 2, 3 do not overlap, and their sum equals the overall population of organization ABC.

See Also

[Chapter 11, "\(FRA\) Forecasting Salaries for France," Technical Details: Compensation Effects, page 207](#)

Forecasting Compensation

This section provides an overview of compensation forecasting and discusses how to:

- Forecast compensation

- Run a compensation simulation
- Run the Scenario Comparison report

Understanding Compensation Forecasting,

The calculation process divides both the reference period and the analysis period into sections by considering the elementary period type. For each elementary period, the process extracts from the Human Resources database the base compensation (from the PS_COMPENSATION table) and the variable compensation (from PS_VC_AWARDS) for all the workers in the group specified at the scenario level. It also calculates the average headcount and full-time equivalents (FTEs) for each elementary period to create average compensation amounts.

This calculation process considers all the events defined for future elementary periods and calculates forecasted compensation. Any event defined for past or current elementary periods is not considered because data exists for those periods of time in the Human Resources database.

The forecasted compensation amounts are stored in salary forecasting tables so that you can compare the results of several scenarios. Remember that the salary forecasting process does not update core Human Resources transaction tables.

Pages Used to Forecast Compensation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Forecast Compensation	LMS_RUN_CNTL_PNL	Compensation, Forecast Compensation FRA, Process Forecast, Forecast Compensation, Forecast Compensation	Initiate compensation forecasting based on specified criteria.
Forecasted Compensation Rpt	RUNCTL_LMS_REPORT	Compensation, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt, Forecasted Compensation Rpt	Report on compensation scenarios.
Scenario Comparison Rpt	RUNCTL_LMS_REPORT	Compensation, Forecast Compensation FRA, Process Forecast, Scenario Comparison Rpt, Scenario Comparison Rpt	Define forecasted compensation and compare scenarios.
Rate Codes w/out Class Rpt	RUNCTL_LMS_RATE_CL	Compensation, Forecast Compensation FRA, Process Forecast, Rate Codes w/out Class Rpt, Rate Codes w/out Class Rpt	Report on rate codes that do not have a rate code class attached to them.

Forecasting Compensation

Access the Forecast Compensation page (Compensation, Forecast Compensation FRA, Process Forecast, Forecast Compensation, Forecast Compensation).

Forecast Compensation

Run Control ID: VP1

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

*Scenario ID:

*Currency:

*Rate Type:

☐ Fixed Exchange Rate

☐ Re-Extraction

☐ Structure Effect

[Scenario Definition](#)

As Of Date:

Carry-Over Factor:

0.00

*Type of Elementary Period:

Forecast Compensation page

Scenario ID	Select a scenario ID.
Scenario Definition	Click to go to the Scenario Definition page of the selected scenario ID.
Fixed Exchange Rate	Select if this currency has a fixed exchange rate.
Re-Extraction	Select if this process is re-extracting the base compensation from the Human Resource database.
Structure Effect	Select if the variance in the overall compensation is due to internal moves within the organization.
Rate Type	Select a compensation rate type.
Carry-Over Factor	The carry over effect represents the impact on a given period of all the measures taken during the previous period. Indicate what will be carried over to the next period.

Running a Compensation Simulation

Access the Forecasted Compensation Rpt page (Compensation, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt, Forecasted Compensation Rpt).

Forecasted Compensation Rpt

Run Control ID: PS

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Scenario Filter

User ID: PSRun Control ID:

Scenario History Report

CustomizeFindView All1 of 1FirstLast

Select	Scenario ID	Scenario Run Date Time	User ID	Run Control ID	Description
<input type="checkbox"/>					

Forecasted Compensation Rpt page

Select a User ID and a Run Control ID, then click the Refresh button. Refreshing populates the Scenario History Report group box. Select the check box for the Scenario ID you want to report on and click Run.

See Also

Chapter 11, "(FRA) Forecasting Salaries for France," Technical Details: Compensation Effects, page 207

Running the Scenario Comparison Report

Access the Scenario Comparison Rpt page (Compensation, Forecast Compensation FRA, Process Forecast, Scenario Comparison Rpt, Scenario Comparison Rpt).

Scenario Comparison Rpt

Run Control ID: PS

[Report Manager](#)

[Process Monitor](#)

Run

Language: English

Scenario Filter

User ID: PSRun Control ID:

Scenario History Report

CustomizeFindView All1 of 1FirstLast

Select	Scenario ID	Scenario Run Date Time	User ID	Run Control ID	Description
<input type="checkbox"/>					

Scenario Comparison Rpt page

Scenario Filter

This group box enables you to narrow the choice of scenarios to report by User ID and Run Control ID.



Click to display scenarios that meet the scenario filter requirements.

Scenario History Report This group box displays all scenarios that meet the scenario filter requirements. Scenarios are listed by Scenario ID, Scenario Run DateTime, User ID, Run Control ID, and Description.

To run one scenario at a time, select its check box.

Purging Scenario History

All the results from of the calculation of any scenario are stored in the database. Define several scenarios with different sets of events, run the calculation for all scenarios, and compare the results. Then, select the scenario that best mirrors your compensation policy. You may then purge from the database the results of some scenario calculations you are not going to use. When you purge scenario history, the calculation results are purged but not the scenario definition.

Page Used to Purge Scenario History

Page Name	Definition Name	Navigation	Usage
Purge Scenario History	RUNCTL_LMS_PURGE	Compensation, Forecast Compensation FRA, Process Forecast, Purge Scenario History	Run the Application Engine process HR_LMSPURGE to delete the results of all the selected scenario calculation runs.

Deleting Scenario Results

Access the Purge Scenario History page (Compensation, Forecast Compensation FRA, Process Forecast, Purge Scenario History).

Purge Scenario History

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Scenario Filter

User ID: Run Control ID:

Scenario History Purge [Customize](#) | [Find](#) | [View All](#) | | First **1 of 1** Last

Purge	*Scenario ID	Scenario Run Date Time	User ID	Run Control ID	Description
<input checked="" type="checkbox"/>	<input type="text"/>				

Purge Scenario History page

Scenario Filter This group box identifies the User ID and Run Control IDs by which to search. To search all histories, click the lightning icon.

Scenario History Purge Chose a scenario to purge by selecting the Purge check box. Note that only the results of the scenario calculation are purged; the scenario definition remains in the database. Information appears in all fields here.

Click Run to run this request. PeopleSoft Process Scheduler runs the Purge Scenario History process at user-defined intervals.

Viewing Scenario History

Perform forecasting activities in two ways:

- Define different scenario IDs, attach a different set of events to them, and run the calculation process for each scenario ID.
- Define only one scenario ID and change the events associated with this scenario ID each time that you process a new calculation.

Use the Scenario History pages to find which events were used for any scenario calculation. Modify and calculate a scenario repeatedly without recalling the events that were used in each calculation.

Pages Used to View Scenario History

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Scenario History	LMS_SCENAR_HISTORY	Compensation, Forecast Compensation FRA, Process Forecast, Review Scenario History	Inquire about the process history of scenarios.
Scenario History Details	LMS_SCENARHIST_SEC	Click Information on the Scenario History page.	View the run control parameters and events for any calculation.

Chapter 12

Viewing and Reporting Summary Salary Data

This chapter discusses how to:

- View compensation history.
- Run reports of compensation changes.
- View worker ranking.
- View job evaluations.

Viewing Compensation History

This section provides an overview of compensation history and discusses how to view a compensation history.

Understanding Compensation History

The Employee Compensation History page shows the starting salary and all subsequent increases a worker has received. It shows the Hire and Rehire actions, and administrative actions that resulted in a change in salary data. It does not display every administrative action; for example, it does not show job movement.

It also shows the number of months since the worker's last increase, as well as how long the worker has been in a salary grade as of today. The details by pay component appear in a grid at the bottom of the page.

Pages Used to View Compensation History

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Compensation History	COMP_SUMMARY	Compensation, Base Compensation, Review Salary Information, Employee Compensation History, Employee Compensation History	View the history of all pay rate changes the worker has received to date. This reference is useful when planning new increases.

Page Name	Definition Name	Navigation	Usage
Rate Code	WCS_RTCD_DETAILS	Click Details on the Compensation History: Controls page.	View additional information about the compensation rate code from the Comp Rate Code table.

Viewing a Compensation Summary

Access the Employee Compensation History page (Compensation, Base Compensation, Review Salary Information, Employee Compensation History, Employee Compensation History).

Employee Compensation History

Piet de Heer EMP ID: GN100ME338 Empl Record: 0

Company: GN3 Job Code: Ctl Jun First Start Date: 01/01/2002
 Business Unit: The Netherlands Location: GNROT01 Community: Country: NLD
 Department: The Netherlands Dept PRO03 Supervisor Lvl:

Compensation Find | View All First 1 of 1 Last

Effective Date: 01/01/2002 Seq: 0 Action: Hire Action Reason:
 Salary Set ID: GN001 Plan: Grade: Grade Entry Date:
 Step: Yrs Grade:
 Comp Rate: 6,000.00 EUR Frequency: Monthly Month Last Incr:
 Change Amount: 0.00 EUR Change Percent: 0.000 Compa-Ratio: 0.00
 Annual Rate: 72,000.00 EUR % Range: 0.0

Pay Components

Amounts Controls Changes Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
KN0001	0	6,000.00 EUR	EUR	Monthly			

Employee Compensation History page

For each salary change, the system displays the following data from the worker's job and compensation records:

Seq (sequence)	The sequence number of the salary change action.
Action and Action Reason	The action and reason that resulted in a salary change.
Plan, Grade, and Step	The worker's salary administration plan, salary grade, and salary step for this effective date, sequence, action, and reason.
Grade Entry Date	The date the worker entered the grade.
Yrs Grade (years in grade)	The number of years the worker has been in this grade.

Comp Rate (compensation rate) and Frequency	The worker's compensation rate as of this effective date, sequence, action, and reason, along with the frequency with which it is paid.
Month Last Incr (month last increase)	The number of months since the last increase.
Change Amount	The amount of the worker's increase for this effective date, sequence, action, and reason.
Change Percent	The percent increase for this effective date, sequence, action, and reason.
Compa-Ratio	The worker's new compa-ratio for this effective date, sequence, action, and reason. The system calculates the compa-ratio figure from the data in the Salary Grade table.
Annual Rate	The worker's new annual rate as of this effective date, sequence, action, and reason.
% Range (percent range)	The worker's new percent that is in range for the effective date, sequence, action, and reason. The system calculates the percent in range figure from the data in the Salary Grade table.

Pay Components

The Amounts, Changes, and Conversions tabs display detailed pay information.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Defining Rate Codes

Running Compensation Change Reports

This section lists the pages used to run:

- Compensation history reports for a worker, group, or company.
- Lists of workers who have received compensation rate changes or merit increases within a specified period.
- Lists of workers who have not received a merit increase within a specified period.

Pages Used to Run Compensation Change Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Salary History by Employee	RUNCTL_CMP011	Compensation, Base Compensation, Compensation Reports, Salary History by Employee	Print the Salary History by Employee report (CMP011). This report displays each salary change for a worker during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.
Salary History by Group	RUNCTL_CMP014	Compensation, Base Compensation, Compensation Reports, Salary History by Group	Run the Salary History by Group report (CMP014). This report provides the salary changes for the workers in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.
Salary History by Company	RUNCTL_PER023	Compensation, Base Compensation, Compensation Reports, Salary History by Company	Run the Salary History by Company report (PER023). This report displays each salary change for a worker during a specified time period.
Employee Compensation Changes	RUNCTL_PER013	Compensation, Base Compensation, Compensation Reports, Employee Compensation Changes, Employee Compensation Changes	Run the Employee Compensation Changes report (PER013). This report lists workers who have had compensation rate changes within a selected time period.
Report Merit Increases	RUNCTL_SP_MERIT	Compensation, Base Compensation, Merit Increases, Report Merit Increases	Run the Merit Increase report (PER041). This report lists all workers who have received a merit increase during the period entered on the parameter page.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Viewing Worker Ranking

This section provides an overview of worker ranking and discusses how to:

- View worker ranking in terms of compensation.
- View the details of worker compensation packages.
- View unidentified workers ranking in terms of compensation.

Understanding Worker Ranking

The system provides two inquiry pages for viewing how workers rank in terms of compensation within a job code. Both pages group workers by salary plan and show the current ranges for the salary plan and grade. Use this information to compare compensation to the minimum, maximum, and midpoints for the grade and to determine whether workers in a job code are being paid equitably in each location.

- The Employee Ranking by Job Code page lists workers by name and worker ID, and it displays their location, annual rate, compa-ratio, and percent in range.

Use a link to the Salary Components page to view the details of the selected worker's compensation package.

- The Anonymous Ranking page lists worker compensation without displaying names and worker ID numbers to preserve privacy.

The page sorts worker compensation by currency in descending order of salary amounts, and it displays the location, annual rate, compa-ratio, and percent in range.

Pages Used to View Worker Ranking

Page Name	Definition Name	Navigation	Usage
Employee Ranking by Job Code	JOB_RANKING	Compensation, Base Compensation, Review Salary Information, Employee Ranking by Job Code	View how workers rank in terms of compensation within a job code.
Salary Components	COMP_EMPL_RANK_SEC	Click Component Details on the Employee Ranking by Job Code: Ratios page.	View the details of the worker's compensation package associated with the current job data row.

Page Name	Definition Name	Navigation	Usage
Rate Code	WCS_RTCD_DETAILS	Click Details on the Salary Components: Controls page.	Review detail information about a specific rate code.
Anonymous Ranking	JOB_RANKING_NO_EE	Compensation, Base Compensation, Review Salary Information, Anonymous Ranking	View how workers rank in terms of compensation within a job code. To protect privacy, worker identification does not appear on the page.

Viewing Worker Ranking in Terms of Compensation

Access the Employee Ranking by Job Code page (Compensation, Base Compensation, Review Salary Information, Employee Ranking by Job Code).

Employee Ranking by Job Code

Set ID: SHARE Job Code: 140025 Analyst-Business Development
Manager Level: Non-Mgr Job Function: Management
Job Family: KSAL Midpoint Rate:
Salary Set ID: SHARE Plan/Grade/Step: KU01 009

Current Annual Ranges Find | View All | First 1 of 1 Last

Set ID	Sal Plan	Minimum Pay Rate-Annual	Grade	Step	Midpoint Pay Rate-Annual	Maximum Pay Rate-Annual	Currency	Co Code
SHARE	KU01	USA Plan	009		119,851.00	149,813.50	USD	GBI

Compensation Ranking Customize | Find | View All | First 1-7 of 7 Last

Work Location Ratios

	Empl ID	Name	Annual Rate	Currency	Company	Location
1	KUI004	Lance Peevy	93000.00	USD	GBI	Alabama
2	KUI014	Peter Lacasse	93000.00	USD	GBI	Alabama
3	KUI024	Lawrence Paulson	93000.00	USD	GBI	Alabama
4	KUL081	Bailey Jaynes	72000.00	USD	GBI	California
5	KUX135	Steven Davis	93600.00	USD	GBI	US HQ
6	KUX135	Steven Davis	93600.00	USD	GBI	US HQ
7	KUX137	Ryan Bookout	65000.00	USD	GBI	US HQ

Employee Ranking by Job Code page

Minimum Pay Rate-Annual The minimum annual salary in the grade.

Midpoint Pay Rate-Annual The midpoint annual salary in the grade.

Maximum Pay Rate-Annual The maximum annual salary in the grade.

Ratios Tab

Compa-Ratio Where workers' salaries lie in relation to the range midpoint for their salary grade.

%Range(percent range) Where workers' salaries fall within the range for their salary grade.



Click the Component Details icon to access the Salary Components page, where you can view workers' compensation details by pay component.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs," Classifying Jobs

Viewing the Details of Worker Compensation Packages

Access the Salary Components page (click the Component Details icon on the Employee Ranking by Job Code page: Ratios tab).

Salary Components

Lance Peavy
ID: KUI004
Empl Record: 0

Compensation Rate: 1,788.46
Currency: USD

Compensation Frequency: W Weekly

Pay Components

Amounts
Controls
Changes
Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
NAANNL	0	93,000.00	USD	Annual			

Salary Components page

For each salary change, this page displays pay component details from the worker's job and compensation records.

Common Elements Used in This Page

Compensation Rate and Comp Freq The worker's annual compensation rate and compensation frequency.
(compensation frequency)

Pay Components

This section of the page displays the details of the compensation package associated with the worker's most current job data row, as displayed on the Employee Ranking by Job Code page.

Amounts Tab

For each salary change, this page displays pay component details from the worker's job and compensation records. On the Amounts tab, the system displays the description of the pay component before the salary change.

Rate Code	The rate code of the salary change.
Seq (sequence)	The rate code sequence number.
Comp Rate (compensation rate), Currency , and Frequency	The compensation rate, currency, and frequency associated with the rate code.
Points	If the rate code type is <i>Points</i> , the system displays the number of points defined for this rate code.
Percent	If the rate code type is <i>Percent</i> , the system displays the percent defined for this rate code.
Rate Code Group	If the rate code type is <i>Percent</i> , the system displays the rate code group to which the percent applies.

Controls Tab

Default Without Override	<p>If this check box is selected, the compensation rate of the workers assigned to this rate code cannot be manually updated on the Compensation page of the Job Data component.</p> <p>Typically, this option is used for seniority rate codes. It is also used for rate codes that use an absorbable premium on the Salary Plan table after the rate code has been added to a worker compensation package.</p>
Details	Click to view the details of the Rate Code definition and to access the Rate Code page, which displays more information about the rate code.

Changes Tab

Change Amount	If the rate code type is <i>flat amount</i> or <i>hourly rate</i> , the system displays the change amount associated with the rate code.
Change Points and Change Percent	If the rate code type is <i>Points or Percent</i> , the system displays the change points and the change percent associated with the rate code.

Conversion Tab

Converted Comp Rate (converted compensation rate)	The new compensation rate for the rate code converted to the worker's compensation frequency and currency.
Apply FTE (apply full-time equivalent)	This check box is selected if you elected to apply FTE calculations to frequency calculations of this rate code.

Viewing Workers' Compensation Rank With Privacy Protected

Access the Anonymous Ranking page (Compensation, Base Compensation, Review Salary Information, Anonymous Ranking).

Anonymous Ranking

Set ID:SHARE

Manager Level:Non-Mgr

Job Family:KSAL

Salary Set ID:SHARE

Job Code:140025Analyst-Business Development

Job Function:Management

Midpoint Rate:

Plan/Grade/Step:KU01009

Current Annual Ranges

FindView AllFirst1 of 1Last

Set ID	Plan	Grade	Step	Min/Annual	Midpt/Annual	Max/Annual	Co
SHARE	KU01	USA Plan	009	119,851.00	149,813.50	179,776.00	USD GBI

Compensation Ranking

CustomizeFind

First1-7 of 7Last

Work Location

Ratios

Annual Rate		Grade Date	Yrs Grade	Company	Location
\$93,000.00	USD	07/18/1990	19.0	GBI	Alabama
\$93,000.00	USD	07/28/1990	18.9	GBI	Alabama
\$93,000.00	USD	07/18/1990	19.0	GBI	Alabama
\$72,000.00	USD	02/01/2001	8.4	GBI	California
\$93,600.00	USD	07/20/2006	2.9	GBI	US HQ
\$93,600.00	USD	07/20/2006	2.9	GBI	US HQ
\$65,000.00	USD	07/20/2006	2.9	GBI	US HQ

Anonymous Ranking page

The fields on this page are identical to the fields on the Employee Rank by Job Code page with these exceptions:

- Min/Annual (minimum annual)

The minimum annual salary in the grade.
- Midpt/Annual (midpoint annual)

The midpoint annual salary in the grade.
- Max/Annual (maximum annual)

The maximum annual salary in the grade.
- Grade Date

The date the worker entered the salary grade.
- Yrs Grade (years in grade)

The number of years the worker has been in the grade.

Viewing Job Evaluations

This section provides an overview of job evaluations and discusses how to compare job evaluation criteria among job codes.

Understanding Job Evaluations

A job evaluation is a method of ranking job codes relative to one another. You create job evaluation criteria in the Job Code Table, assigning points for various skills, such as knowledge and experience (Knowhow), accountability, and problem-solving. On the Job Evaluations by Grade inquiry page, you can view the evaluation information along with the managerial level and function of each job code. Job codes are sorted in descending order by total points.

You can also generate the Job Grading by Evaluation Points report (CMP002), which provides similar information.

Pages Used to View Job Evaluations by Grade

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Evaluations by Grade	JOB_EVALUATIONS	Compensation, Base Compensation, Review Salary Information, Job Evaluations by Grade	Compare job evaluation criteria among job codes within a salary plan and grade.
Job Evaluations by Grade USF	GVT_JOB_EVALUATION	Compensation, Base Compensation, Review Salary Information, Job Evaluations by Grade USF	Compare job evaluation criteria among job codes within a salary plan and grade.

(GBL) (USF) Comparing Job Evaluation Criteria

Access the Job Evaluations by Grade page (Compensation, Base Compensation, Review Salary Information, Job Evaluations by Grade).

Set ID:	SHARE							
Salary Administration Plan:	KC01	CDN Salary Administration Plan						
Salary Grade:	003	Standard Pay Grade 3						
Current Annual Ranges								
Minimum:	21,195.24	Midpoint:	24,377.64					
		Maximum:	27,560.04					
			CAD					
Job Evaluation								
Set ID	Job Code	Short Descr	Total Points	Job Function	Manager Level	Knowhow	Accountability	Problem-Solving

Job Evaluations by Grade page

Current Annual Ranges

The system displays the following information about the salary grade, as you defined it on the Salary Grade Table page:

Minimum, Midpoint, and Maximum Minimum, midpoint, and maximum annual compensation in the grade.

Job Evaluation

Total Points, Job Function, and Manager Level Enter the corresponding values associated with this job code.

Knowhow, Accountability, and Problem-Solving Displays the number of points associated with this criterion for this job code.

Appendix A

Predefined Source IDs and Result IDs for Configurable Matrices

This appendix contains a list of predefined source IDs and result IDs that are delivered with PeopleSoft Human Resources Manage Base Compensation.

Predefined Source IDs

This is a list of the predefined source IDs delivered as system data. Use these source IDs to define and maintain inputs used in configurable matrices.

<i>SOURCE_ID</i>	<i>SOURCE_TYPE_ID</i>	<i>Label</i>	<i>Description</i>
COUNTRY	ADDRESS	Country	Country of Business Address
SENIORITY_DATE	DATES	Seniority Date	Seniority Date
ANNUAL_RATE	EMPINFO	Annual Rate	Annual Comp Rate
APPOINTMENT_TYPE	EMPINFO	Appt type	Appointment Type
BARGAINING_UNIT	EMPINFO	Unit	Bargaining Unit
BEN_STATUS	EMPINFO	Benefit Status	Benefit Status
BENEFIT_SYSTEM	EMPINFO	Benefit System	Benefit System
BUSINESS_UNIT	EMPINFO	Business Unit	Business Unit
COMPANY	EMPINFO	Company	Company
COMPRATE	EMPINFO	Base Rate	Base Compensation Rate
DEPARTMENT	EMPINFO	Department	Department of Employee
EEO_CLASS	EMPINFO	EEO Class	EEO Classification
EMPL_CLASSIFICATION	EMPINFO	Empl Class	Employee Classification

SOURCE_ID	SOURCE_TYPE_ID	Label	Description
EMPL_CTG	EMPINFO	Empl Category	Employee Category
EMPL_STATUS	EMPINFO	Payroll Status	Employee Payroll Status
EMPL_TYPE	EMPINFO	Employee Type	Employee Type
FLSA_STATUS	EMPINFO	FLSA Status	FLSA Status
GRADE	EMPINFO	Grade	Grade
JOBCODE	EMPINFO	Job Code	Job Code
LOCATION	EMPINFO	Location	Employee Location
PERSON_NAME	EMPINFO	Name	Person Name
SAL_ADMIN_PLAN	EMPINFO	Sal Admin Plan	Salary Administration Plan
STEP	EMPINFO	Sal Step	Salary Grade Step
UNION_CODE	EMPINFO	Union	Union Code
EMPL_GRD_MAXHRLY	EMPRELATED	GradeMaxHourly	Hourly Rate of Grade Maximum
MANAGER_LEVEL	EMPRELATED	Manager Level	Manager Level of Job
GEOGAREA	GEOGRAPHY	Geog Area	Geographical Area
POS_SUPV_LVL	POSITION	Pos Supr Level	Position Supervisor Level
PERFRATING	RATING	Perf Rating	Test Perf Rating
COMPA-RATIO	RATIOS	Compa-Ratio	Compa Ratio
JOB-RATIO	RATIOS	Job Ratio	Job Ratio
PERCENT-IN-RANGE	RATIOS	% in Range	Percent in Range
GRD1STEP1_HRLY	STEPRATE	Grd1Step1_Hrly	Hourly Rate of Grade 1 Step 1
COMPCODE	SUPPLIED	CompCode	Comp Code
CURRENCY	SUPPLIED	Currency	Currency Code
EMPLID	SUPPLIED	EmplID	Employee ID
SURVEY_JOB_CODE	SUPPLIED	Survey Job Code	Survey Job Code

SOURCE_ID	SOURCE_TYPE_ID	Label	Description
SURVEY_PROVIDER	SUPPLIED	Survey Provider	Survey Provider
MONTHS_IN_COMPANY	TIMESPAN	MonthsofService	Months in Company

Predefined Result IDs

This is a list of the predefined result IDs delivered as system data. You can also create additional result IDs. Use these values to define outputs for configurable matrices.

Result_ID	RESULT_TYPE_ID	Label	Description
AWARD	SIMPLECHAR	Award	Variable Comp Award
CURRENCY	SIMPLECHAR	Currency	Currency
PROVIDER	SIMPLECHAR	Provider	Survey Provider
PROVIDER_DESCRIPTION	SIMPLECHAR	Provider Desc	Survey Provider Description
SALARY_SURVEY_DEFAULT	SIMPLECHAR	Survey Default	Salary Survey Default
SOURCE_REFERENCE	SIMPLECHAR	Source Ref	Source Reference
SURVEY_JOBCODE	SIMPLECHAR	Survey Job Code	Survey Job Code
10_PERC	SIMPLENUM	10th Perc	10th Percentile
100_PERC	SIMPLENUM	100th Percentil	100th Percentile
15_PERC	SIMPLENUM	15 Perc	15th Percentile
16_6PERC	SIMPLENUM	16.6 Prcntile	16.6th Percentile
20_PERC	SIMPLENUM	20th Perc	20th Percentile
25_PERC	SIMPLENUM	25th Percentile	25th Percentile
30_PERC	SIMPLENUM	30th Percentile	30th Percentile
33_3PERC	SIMPLENUM	33.3rd Prcntile	33.3rd Percentile
35_PERC	SIMPLENUM	35th Percentile	35th Percentile
40_PERC	SIMPLENUM	40th Percentile	40th Percentile

Result_ID	RESULT_TYPE_ID	Label	Description
45_PERC	SIMPLENUM	45th Percentile	45th Percentile
5_PERC	SIMPLENUM	5th Perc	5th Percentile
50_PERC	SIMPLENUM	50th Percentile	50th Percentile
55_PERC	SIMPLENUM	55th Percentil	55th Percentile
60_PERC	SIMPLENUM	60th Percentile	60th Percentile
65_PERC	SIMPLENUM	65th Percentile	65th Percentile
66_6PERC	SIMPLENUM	66.6th Percntile	66.6th Percentile
70_PERC	SIMPLENUM	70th Percentile	70th Percentile
75_PERC	SIMPLENUM	75th Percentile	75th Percentile
80_PERC	SIMPLENUM	80th Percentile	80th Percentile
83_3PERC	SIMPLENUM	83.3rd Prcntile	83.3rd Percentile
85_PERC	SIMPLENUM	85th Percentile	85th Percentile
90_PERC	SIMPLENUM	90th Percentile	90th Percentile
95_PERC	SIMPLENUM	95th Percentile	95th Percentile
AMOUNT	SIMPLENUM	Amount	Compensation Amount
BASE	SIMPLENUM	Base	Base Compensation
BASE_MAXIMUM	SIMPLENUM	Base Maximum	Base Maximum
BASE_MEAN	SIMPLENUM	Base Mean	Base Mean
BASE_MEDIAN	SIMPLENUM	Base Median	Base Median
BASE_MINIMUM	SIMPLENUM	Base Minimum	Base Minimum
BASE_MKT_REFERENC E	SIMPLENUM	Base Mkt Ref	Base Market Reference
BONUS_PERCENT	SIMPLENUM	Bonus Percent	Bonus Percentage
DEFAULT_AMOUNT	SIMPLENUM	Default Amount	Default Comp Amount
DEFAULT_PERCENTAG E	SIMPLENUM	Default Percent	Default Percentage

Result_ID	RESULT_TYPE_ID	Label	Description
DEFAULT_POINTS	SIMPLENUM	Default Points	Default Points
MAXIMUM_AMOUNT	SIMPLENUM	Max Amount	Maximum Amount
MAXIMUM_PERCENTAGE	SIMPLENUM	Max Percentage	Maximum Percentage
MAXIMUM_POINTS	SIMPLENUM	Max Points	Maximum Points
MEAN_BASE_RATE	SIMPLENUM	Mean Base Rate	Mean Base Rate
MEAN_TOTAL_COMPENSATION	SIMPLENUM	Mean Total Comp	Mean Total Compensation
MEDIAN_BASE_RATE	SIMPLENUM	Median Base Rat	Median Base Rate
MEDIAN_TOTAL_COMPENSATION	SIMPLENUM	Med Total Comp	Median Total Compensation
MIDPOINT_RATE	SIMPLENUM	Midpoint Rate	Midpoint Rate - Base Comp
MINIMUM_AMOUNT	SIMPLENUM	Min Amount	Minimum Amount
MINIMUM_PERCENTAGE	SIMPLENUM	Min Percent	Minimum Percentage
MINIMUM_POINTS	SIMPLENUM	Min Points	Minimum Points
MKT_SOURCE_REFERENCE	SIMPLENUM	Mkt Source Ref	Market Source Reference
NEW_AMOUNT	SIMPLENUM	New Rate	New Compensation Rate Amount
NEW_POINTS	SIMPLENUM	Points	Compensation Rate Points
PERCENTAGE	SIMPLENUM	Percentage	Compensation Percentage
ROUNDING_THRESHOLD	SIMPLENUM	Rounding Thresh	Rounding Threshold
SURVEY_SALARY	SIMPLENUM	Survey Salary	Survey Salary
TOTAL_COMPENSATION	SIMPLENUM	Total Comp	Total Compensation
TOTAL_COMPENSATION_REF	SIMPLENUM	Total Comp Ref	Total Compensation Reference

Result_ID	RESULT_TYPE_ID	Label	Description
VARIABLE_MARKET_REFERENCE	SIMPLENUM	Variable MktRef	Variable Market Reference
VARIABLE_MAXIMUM	SIMPLENUM	Variable Maximum	Variable Maximum
VARIABLE_MEAN	SIMPLENUM	Variable Mean	Variable Mean
VARIABLE_MEDIAN	SIMPLENUM	Variable Median	Variable Median
VARIABLE_MINIMUM	SIMPLENUM	Variable Minimum	Variable Minimum
VARIABLE_TARGET_PCT_REFERENCE	SIMPLENUM	Var Tgt Pct Ref	Variable Target Pct Reference
VARIABLE_TARGET_PERCENT	SIMPLENUM	Variable TgtPct	Variable Target Percent
SURVEY_DATE	SIMPLEDATE	Survey Date	Survey Date
INCREMENT_AMOUNT	INCRBYAMT	Incr Amount	Increment Amount
INCREMENT_PERCENT	INCRBYAMT	Incr Percent	Increment Percent
PERCENT_TO_APPLY	PCNTOFBASE	Pct to Apply	Percent to Apply
ANNUAL_RATE_SOURCE	SOURCE	Annual Rate Src	Annual Compensation Rate
EMPL_GRD_MAXHRLY	SOURCE	Annual Rate Src	Annual Compensation Rate
THRESHOLD	THRESHOLD	Threshold	Threshold

Index

A

- Above Maximum Analysis page 55
- ACEP (Average Compensation for Employees in Place) effect
 - See* Average Compensation for Employees in Place
- Additional Simulation Parameters page 214
- anniversary dates, creating 38, 159
- Anonymous Ranking page 240, 243
- Assign/Approve Merit Increase page 169
- Assign Group Budget Parameters page 36, 39
- Australia (AUS)
 - Australian Public Service classifications 29
 - DETYA job classifications 29
- automated step increase process 48
- Automated Step Increment EG page 47, 50
- Automated Step Increment page 47, 48
- Average Compensation for Employees in Place (ACEP) 207

B

- base compensation and budgeting
 - administering with salary plan defaults 44
 - base compensation and budgeting 4
 - business processes 4
 - designing your program 6
 - France 6
 - integrations 5
 - job codes or locations 45
 - mass salary increase processes 5
 - prerequisites 3
 - salary administration plans 4
 - setting default budgeting values 37
 - summary data and reports 5
 - using configurable matrices 9
- Below Minimum Analysis page 55
- Budget Calculation page 133
- budget components
 - calculating 138
 - entering 138
- budget default values, defining 37
- Budget Information page 147, 156
- budgeting and planning
 - See* base compensation budgets and plans
- budgeting and planning, understanding 35
- budgets
 - entering and calculating components 138
 - entering descriptions 133
 - entering requests 134
 - setting up 35
 - viewing comparisons 143
 - viewing details 142
- budget types, defining 36
- Budget Types component
 - (SP_BUD_TYPE_TBL_GBL) 35
- Budget Types page 35, 36
- budget variances, viewing 145

- business process, overview 1

C

- Calculate Group Increases page 147, 148
- carry over effect 207
- Categorization Defaults page 18, 25
- CMP001 33
- CMP002 53
- CMP003 53
- CMP004 53
- CMP005 53
- CMP008 process 175
- CMP010 process 178
- CMP011 238
- CMP014 238
- CMP020JP process 197, 203
- Compare Group Budgets - Budgets page 143, 144
- Compare Group Budgets - Comparison page 144, 145
- Compare Group Budgets - Components page 144
 - compensation
 - loading salary changes 158
 - understanding effects 207
 - viewing history 235
 - compensation effects *See* effects
 - compensation effects (FRA) 207
- Compensation Increases page 215, 219
- component interface 2
- configurable matrices
 - calculated results 61
 - copying 113
 - defining 97
 - defining inputs 99
 - defining matrix output information 103
 - defining search keys 105
 - entering data content fields 109
 - examples 59
 - loading values from prompt tables 107
 - market pay 60
 - matrices with two inputs and one output 60
- Matrix Definition page 10
- MATRIX example 83
- predefined result IDs 249
- predefined source IDs 247
- simple rate 59
- understanding 59
- understanding inputs 61
- using special rules 111
- using with salary increase guidelines 9
- viewing matrix results 110

- configurable matrices, defining results 84
- INCRBYAMT 89
- INCRBYAMT example 90
- MATRIX 95
- PCNTOFBASE 91
- SIMPLECHAR 86
- SIMPLEDATE 88
- SIMPLENUM 87
- SOURCE 93

- THRESHOLD 92
 - understanding 84
- configurable matrices, defining sources
 - ADDRESS 68
 - DATES 69
 - EMPINFO 72
 - EMPRELATED 73
 - GEOGRAPHY 77
 - MATRIX 82
 - POSINFO 75
 - POSRELATED 76
 - RATING 71
 - RATIOS 70
 - STEPRATE 78
 - SUPPLIED 81
 - TIMESPAN 79
 - understanding 65
- configurable matrices, understanding
 - evaluation rules 62
 - matrix displays 63
 - matrix types 62
 - outputs 62
 - using wildcards 62
- CONTROL_TBL_GBL component 35
- Copy Matrix page 113
- Create/Approve Group Budget - Budget Components page 132, 138
- Create/Approve Group Budget - Budget Description page 132, 133
- Create/Approve Group Budget - Budget Requested page 132, 134
- Create/Approve Group Budget - More Budget Details page 132, 142
- Create Mass Pay Adjustment page 184
- create mass pay adjustments, defining process (USF) 184
- Create Mass Pay Adjustments page 182
- Create Mass Pay Adjustment USF component (RUN_FGPY005) 180

D

- Data Content page 10, 15, 97, 109
- Default Budget Parameters page 36, 37
- Define Budgets component (CONTROL_TBL_GBL) 35
- Define Budgets page 35
- Define Matrices component (WCS_LK_TBL_DEFN) 9, 96
- Define Merit Group page 164, 168
- Define Merit Increase page 163, 164
- Define Results component (WCS_RESULT_DEFN) 9, 84
- Define Salary Grades component (SALARY_GRADE_TBL) 16
- Define Salary Increase Amount page 193, 194
- Define Salary Increase ID page 197, 198
- Define Salary Increase Matrix component (SALARY_MATRIX_TBL) 16
- Define Salary Increase Matrix page 18, 19, 197
- Define Salary Plan component (SALARY_PLAN_TABLE) 16
- Define Salary Plan page 18, 21
- Define Sources component (WCS_SOURCE_DEFN) 9, 64
- Define Step Increase page 191

E

- education and government 50
- EE Review Result Distribution Report (PER026) 124
- effects
 - average compensation for employees in place (ACEP) 207
 - carry over 207
 - compensation, technical details 207
 - headcount 207
 - level 207
 - mass 207
 - Noria 208
 - structure 207
 - variance of compensation 208
- Employee Compensation Changes page 238
- Employee Compensation History page 235, 236
- employee goals, reviewing 123
- Employee Ranking by Job Code page 239, 240
- Employee Review page 118
- employee reviews
 - comments 121
 - goals 123
- evaluations, viewing 244
- events, categories 208
- events (FRA), definition 213

F

- FGHR005 34
- Forecast Compensation page 229, 230
- Forecasted Compensation Rpt page 229, 230
- France (FRA)
 - assessing the structure effect 228
 - associating contiguous working periods 212
 - associating events with a scenario 226
 - compensation effects 207
 - defining a working schedule 223
 - defining hours rates 224
 - defining proration rules 223
 - defining salary forecasting periods 211
 - defining salary forecasting scenarios 225
 - designing the salary forecasting process 6
 - elementary period, definition 211
 - forecasting compensation 228
 - HR_LMSPURGE process 232
 - purging salary forecasting scenario history 232
 - running compensation simulation 230
 - running scenario comparison report 231
 - salary forecasting 205
 - setting up events 213
 - setting up salary forecasting 206
 - simulating a compensation increase event 219
 - simulating a headcount decrease 221
 - simulating a promotion 221
 - simulating future awards 218
 - simulating headcount increase 216
 - simulating seniority 222
 - triggering period, definition 211
 - viewing salary forecasting scenario history 233

G

Generate Salary Increase Data page 197, 199
 grade advance
 non-weighted 43
 weighted 43
 Grade Advance Candidate JPN page 56
 Grade Advance Candidates JPN page 56
 grade advance criteria 30
 Grade Advance Criteria page 19, 30, 43
 grades *See* salary grades
 group budgets, viewing details 142
 group default control values, establishing 39
 group increases
 budgeting 128
 Calculate Group Increases page 148
 calculating 148
 identifying budget 150
 pay components 152
 proposing raises 151
 group salary increases, process flow diagram 130

H

Headcount decrease event setup component
 (LMS_LEAVES_EVENT_GBL) 213
 Headcount Decreases page 215, 221
 headcount effect 207, 208
 Headcount increase setup panel component
 (LMS_ENTRIES_EVENT_GBL) 213
 Headcount Increases page 214, 216
 Hours rate setup panel component
 (LMS_HOURS_RATE_GBL) 213
 Hours rate setup panel page 216, 224
 HR_LMSPURGE process 232
 HR_SP_CI process 175

I

implementation 1
 Incentives page 214, 218
 increases
 applying group increases
 See Also group increases
 budgeting groups 128
 budgeting procedures
 See Also merit increases
 Inputs page 10, 11, 97, 99

J

Japan (JPN)
 CMP020JP process 197, 203
 Grade Advance Candidate report 56
 setting grade advance criteria 30, 43
 updating salaries
 See Also updating salaries (JPN)
 job
 updating by job code 178
 viewing evaluations 244

Job Evaluations by Grade page 245
 Job Evaluations by Grade USF page 245
 Job Grading by Evaluation Pts. page 54

L

level effect 207
 LMS_ENTRIES_EVENT_GBL component 213
 LMS_HOURS_RATE_GBL component 213
 LMS_INCENT_EVENT_GBL component 213
 LMS_INCREASE_EVENT_GBL component 213
 LMS_LEAVES_EVENT_GBL component 213
 LMS_PERIOD_PNLGP_GBL component 211
 LMS_PROMO_EVENT_GBL component 213
 LMS_PRORATION_GBL component 213
 LMS_SCENARIO_GBL component 225
 LMS_SCHEDULE_EVENT_GBL component 213
 LMS_SENIOR_EVENT_GBL component 213
 LMS_WRK_PD_PNLGP_GBL component 211
 Load Configurable Matrix Keys page 10, 97, 107
 Load Group Increases page 159
 loading salary changes 158
 Load Merit Increases page 169, 173
 load salary changes
 prerequisites 158
 refreshing anniversary dates 159
 running salary changes 159
 Load Salary Increase page 193, 194, 197, 203
 Load Salary Steps page 191, 192

M

MASS_PAY_SETUP component 180
 mass effects 207
 Mass Pay Adjustment Pay Tables page 182
 mass pay adjustments
 administering (USF) 180
 defining parameters (USF) 181, 182, 183
 generating a report (USF) 185
 understanding (USF) 180
 Mass Pay Adjustments USF component
 (MASS_PAY_SETUP) 180
 Mass Pay Plans page 181, 183
 Mass Pay Type page 181, 182
 mass salary updates
 by job code 178
 by salary plan / pay group 175
 processing 175
 selecting processing method 177, 179
 setting report request parameters 177, 179
 understanding 178
 Update By Plan/Paygroup page 176
 matrix
 example 161
 increase matrix method (MEX) 160
 Matrix Definition page 9, 10, 97
 Merit Increase Details page 169, 171
 merit increases
 assigning and approving 169
 defining groups 168
 defining increase IDs 164
 defining review points resolution 165
 loading 173

- overview 168
- prerequisites 163
- reporting 174
- reviewing details 171
- Mexico (MEX)
 - defining increase method 39
 - increase matrix method 160
 - increase matrix method, example 161
- military salary plans 46

N

- Noria effect 208

O

- Outputs page 10, 12, 97, 103

P

- PER008 125
- PER012 55
- PER013 238
- PER023 238
- PER041 238
- PER062JP 56
- PER706A 34
- PER706B 34
- Period Setup panel component
 - (LMS_PERIOD_PNLGP_GBL) 211
- Period Setup panel page 212
- prerequisites, loading salary changes 158
- Promotion event setup panel component
 - (LMS_PROMO_EVENT_GBL) 213
- Promotions page 215, 221
- proposed budgets, viewing 144
- Propose Raises page 147, 148
- Proration setup panel component
 - (LMS_PRORATION_GBL) 213
- Proration setup panel page 216, 223
- Purge Scenario History page 232

R

- rank, salary plans and grades 46
- ranking 239
- Rate Code page 18, 236, 240
- Rate Codes w/out Class Rpt page 229
- Ratio Analysis page 54
- Refresh Anniversary Date page 158, 159
- reporting
 - salary administration plans 33
 - worker reviews 124
 - worker salary structure 53
- Report Merit Increases page 169, 174, 238
- reports
 - CMP011 238
 - CMP014 238
 - compensation changes 237

- EE Review Result Distribution Report 124
- Employee Review Report 125
- PER013 238
- PER023 238
- PER041 238
- Result Definition page 85
 - INCRBYAMT results type 86
 - MATRIX results type 86
 - PCNTOFBASE results type 86
 - SIMPLEDATE results type 86
 - SIMPLENUM results type 86
 - SOURCE results type 86
 - THRESHOLD results type 86
- Results Definition page 86
- Review Audit page 125
- Reviewer Comments page 118
- Review History - Comments page 118
- Review History - Goals page 118, 123
- Review History - Reviewers page 118, 121
- Review Results Resolution page 163, 165
- RUN_FGPY005 component 180
- RUNCTL_PER062_JPN process 56

S

- SAL_PLAN_CNTRL_GRP_GBL component 35
- SAL_PLAN_CONTROL_GBL component 35
- salaries (JPN) *See* updating salaries (JPN)
- salary
 - components 26
 - structure 52
 - viewing and reporting data 235
- SALARY_GRADE_TBL component 16
- SALARY_MATRIX_TBL component 16
- SALARY_PLAN_TABLE component 16
- salary administration plans
 - basic process 4
 - currency default and conversion 41
 - overview of setup 16
 - reporting 33
 - salary increase guidelines 42
 - structure 41
- salary changes, using the automated process 48
- Salary Components page 239, 241
- salary forecasting (FRA), understanding salary forecasting 205
- Salary Grade/Step page 34
- salary grades
 - administration 41
 - associating with labor agreements 25
 - establishing salary steps for USF 31
 - increment types 27
 - salary ranges 25
 - setting up 16, 24
 - understanding 43
- Salary Grade Table page 18, 24, 34
- Salary Grade Table Rpt USF page 34
- Salary History by Company page 238
- Salary History by Department page 55
- Salary History by Employee page 238
- Salary History by Group page 238
- salary increase administration
 - entering salary changes manually 46
 - entering salary increases automatically 48
 - understanding 46
- salary increase budgets and plans 128

- administering by worker anniversary date 37
- approving a budget 145
- budgeting group increases 128
- loading salary changes 158
- process overview 4, 127
- setting up controls 35
- understanding budgeting procedures 129
- Salary Increase event setup component (LMS_INCREASE_EVENT_GBL) 213
- salary increase guidelines 42
 - defining data content for configurable matrices 15
 - defining for configurable matrices 10
 - defining inputs for configurable matrices 11
 - defining outputs for configurable matrices 12
 - defining search keys for configurable matrices 14
 - Outputs page 12
 - viewing matrix results for configurable matrices 16
- salary increase matrix
 - defining 19
 - rating scale 20
- salary increase planning
 - calculating based on budget 147
 - integrating worker reviews 147
 - planning for groups 146
 - selecting default method 38
 - understanding 146
 - viewing budget information 156
 - viewing the summary 155
- salary increases, administering 46
- Salary Increase Simulation JPN page
 - adjustments 202
 - amounts 202
 - general information 200
 - salary details 201
- Salary Plan Default Values component (SAL_PLAN_CONTROL_GBL) 35
- Salary Plan Group Default Values component (SAL_PLAN_CNTRL_GRP_GBL) 35
- salary planning
 - See* base compensation and budgeting
- salary plans
 - administration 41
 - auto calculated premium 22
 - defining characteristics 21
 - frequency defaults 22
 - setting up 16
 - tariff (DEU) 23
- salary plans and grades, military 46
- Salary Simulation Report page 197, 203
- Salary Step Components page 18, 26
- salary steps
 - administration 41
 - associating salary components 26
 - setting up 16
 - understanding 43
- Salary Step Table (USF) page 19
- Salary Step Table page 31
- Salary Structure page 33
- Salary Structure Summary page 19
- Scenario Comparison Rpt page 229, 231
- Scenario Definition page 226
- Scenario History Details page 233
- Scenario History page 233
- Scenario setup panel component (LMS_SCENARIO_GBL) 225

- Search Keys page 10, 14, 97, 105
- Seniority page 215, 222
- Seniority Setup panel component (LMS_SENIOR_EVENT_GBL) 213
- SIMPLECHAR results type 85
- Simulate Salary Increase page 197
- Source Definition page 68
 - ADDRESS source type 67
 - DATES source type 67
 - EMPINFO source type 67
 - EMPRELATED source type 67
 - GEOGRAPHY source type 68
 - MATRIX source type 68
 - POSINFO source type 67
 - POSRELATED source type 67
 - RATING source type 67
 - RATIOS source type 67
 - STEPRATE source type 68
 - SUPPLIED source type 68
 - TIMESPAN source type 68
- SP_BUD_TYPE_TBL_GBL component 35
- structure effect 207
- Structure Effect page 226, 228
- Summarize and Approve Raises page 147, 155

U

- United States Federal (USF)
 - mass pay adjustments 180
 - salary steps 31
- Update By Job Code page 178
- Update By Plan/Paygroup page 176
- updating salaries
 - by pay group 175
 - by salary plan 175
- updating salaries (JPN)
 - by increase amount 193
 - by percentages 196
 - by step increase 190

V

- View page 10, 16, 97, 110

W

- WCS_LK_TBL_DEFN component 9, 96
- WCS_RESULT_DEFN component 9, 84
- WCS_SOURCE_DEFN component 9, 64
- worker performance history
 - viewing 117
 - viewing information 117
- worker ranking 239
- worker reviews
 - report 124
 - viewing history 117
- worker salary structure
 - reporting 53
 - viewing compa-ratios 52
 - viewing information 52
 - viewing range calculations 52
- Working period setup panel component

(LMS_INCENT_EVENT_GBL) 213
Working period setup panel component
 (LMS_WRK_PD_PNLGP_GBL) 211
Working Periods page 212
Working Schedule event setup component
 (LMS_SCHEDULE_EVENT_GBL) 213
Working Schedule page 216, 223