Taleo Enterprise

Taleo Compensation
Compensation Administrator Guide

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Revision History

The Revision History lists modifications that were made to this document since the last publication.

Date	Modification	Revised Topics
August 31, 2012	Initial version.	

Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.
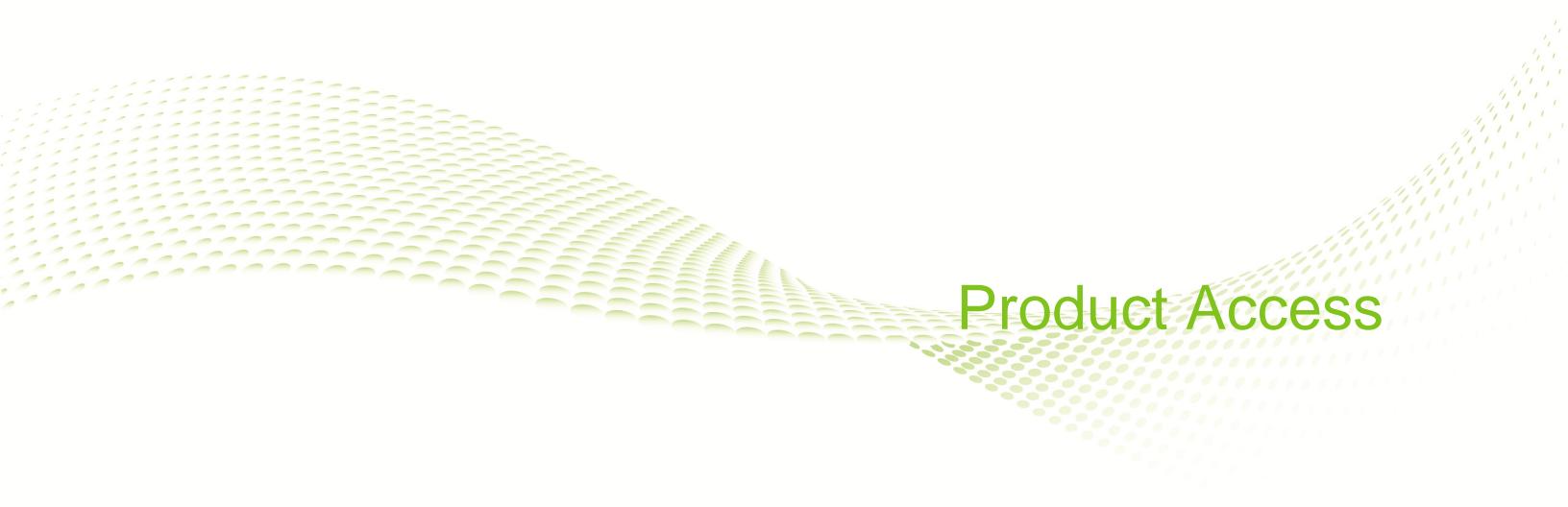
Product Access

Login and Product Access

Access Taleo Compensation through a designated URL address and the login credentials sent to you by the system administrator. Use the User Sign In page to log into Taleo Enterprise and see the list of products to which you have access.

Select the language in which you want to use the application. If you change the default language on the Sign In page, the page refreshes to the new language and subsequent Taleo pages are presented in the selected language.

Once your credentials have been entered and accepted, the Taleo Enterprise Welcome page appears and presents Taleo products purchased by your organization and available to you according to your associated user type and permissions.

Logging In

Prerequisite

You must know the Web address and have received a user name and password from the system administrator.

Taleo Enterprise URL > *User Sign In*

Steps

1. Select the language in which you want to use the application.

2. Enter your user name and password.

3. Click Sign In.

4. On the Taleo Enterprise Welcome page click the Compensation product.

Result

You now have access to the application.

Next Step

If logging in for the first time, you must select a new password.

Using the Forgot Password Link

If you forget your password a link is provided on the User Sign In page to assist you.

Prerequisite

You must have a valid username and email address in your user profile.

Taleo URL > ***User Sign In***

Steps

1. Click "Forgot Your Password?".
2. Enter your username and email address.
3. Click OK.

Result

If you are an authorized user an email is sent to the supplied address with a code to access the application.

Next Step

You must click the link provided in the email, enter your username and access code, and provide a new password.

Changing Your Password

Prerequisite

A setting allows the activation of this feature. A user type permission grants users access to this feature.

Steps

1. Click My Setup located in the top right-hand corner.
2. In the General tab, click Edit.
3. Modify the information contained in the Account section.
4. Click Save.

Result

Your password is changed to one of your choosing.

User Roles

Users are assigned one or more roles associated with a set of features. If you are assigned more than one role, you can move to another role by clicking Change Role at the top right corner of the page and selecting from the list of available roles. The user roles available within a typical Taleo Compensation configuration are detailed below.

User Role	Description
HR Administrator	Reviews compensation planning for either all employees or a subset of employees.
Company Compensation Administrator	Reviews and sets user access information as well as compensation plan details for base pay, bonus and stock.
Company System Administrator	Configures Compensation system application variables, data validation rules,and processes customer data files. Also views who is logged into the Compensation application.
Manager	Conducts compensation planning for direct and indirect reporting employees.

Application Timeout

Application timeout is a security feature that signs you out when the application is idle for more than fifteen minutes.

When the timeout delay is reached a message notifies you the timeout for the application is imminent.

Two scenarios are possible:

- **Take action:** Click "Access the application" to open and reset it.
- **Do not take action:** If you do not reset the application within the defined delay, a message is displayed indicating you have been signed out of the application and will need to sign in again to use it.

The timeout delay is set by default to fifteen minutes. The reminder displayed before timeout is set by default to five minutes before timeout.

The application timeout is configurable. Contact Taleo Support for details.
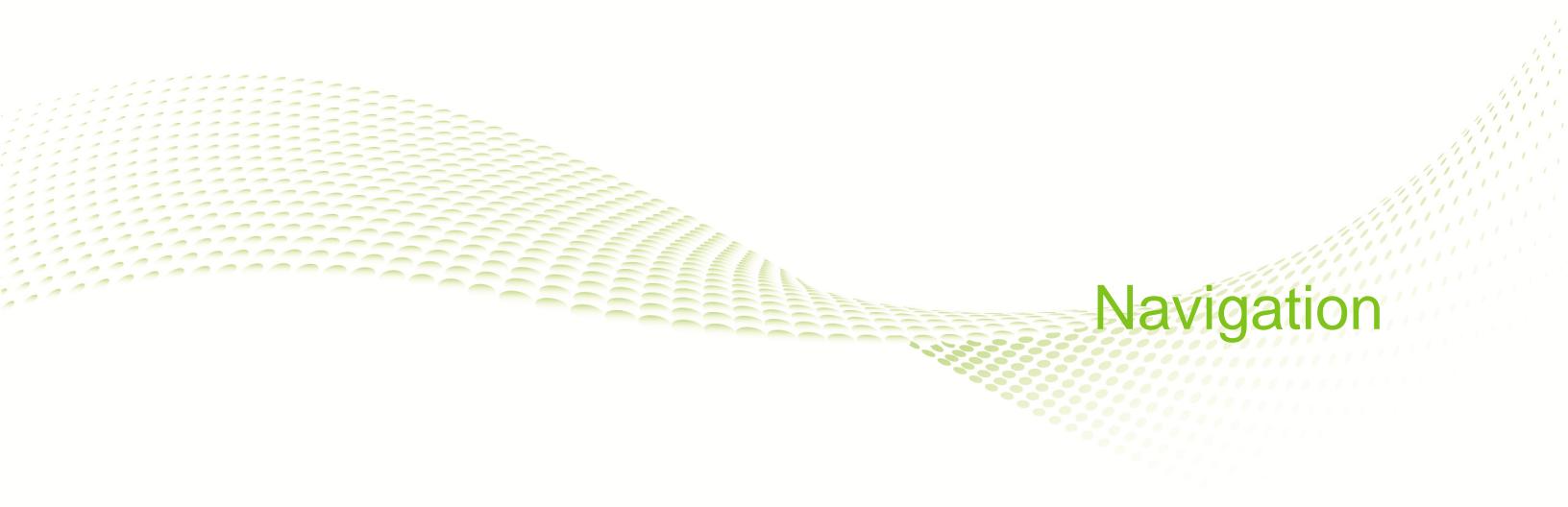
Navigation

Buttons and Icons

The following table describes the buttons and icons generally available throughout Taleo Compensation. Other feature specific buttons and icons are defined in the feature sections where they apply.

UI Element	Description
Calendar button	Opens a Calculator widget, enabling user to select a date displayed in the proper format for the active field.
Cancel	Discards the changes on the active pane, section, or window.
Calculator button	Opens a Calculator widget, enabling user to create an equation. (e.g. Eligibility, Proration, Basepay or Bonus calculator).
Clear	Removes entries from a page, section or field and reverts to blank.
Copy	Copies the item selected in the adjacent drop-down.
Delete	Deletes the selected object (e.g. a field, plan or file)
Download	Downloads the selected item, usually a file, to a local directory.
Get Report	Retrieves a log report for the current transaction type.
Preview	Previews the item selected in the adjacent drop-down.
Run Report	Runs the selected report.
Save	Saves the changes on the active pane, section, or window.
Search	Executes a search for the desired data using the active criteria.
Select	Refreshes the current screen to reflect the item selected within the adjacent drop-down.
Upload	Uploads the selected object, usually a file and usually to the database.
	Expands or collapses a section on a page.
	Moves up the management hierarchy in a team or manager view grid.

Configuration - General

General Configuration

Functionality on the Compensation Administrator's Configuration tab, General page, provides access to two functions. The Roles and Privileges portlet is used to view access information for users. The Cycle Dates portlet is used to enter compensation planning cycle information into the system. When the General page opens, the two portlets default as collapsed, but they can be expanded with the click of a button.

Roles and Privileges

The Roles and Privileges portlet allows the compensation administrator to search for users and view identifying and login information about them. The user's access roles and permissions are controlled through SmartOrg.

Compensation administrators begin by searching for and selecting a user. Once selected, the person's identifying and login information populates the General section of the portlet. The administrator can then view, but not edit, the following information:

- First Name
- Last Name
- Email
- ERP ID
- User Login
- Created On
- Last Login

Viewing a User's Identifying and Login Information

Prerequisite

You need to view a user's identifying or login information, such as their ERP ID or email address.

Configure Plans tab > *General page* > *Roles / Privileges portlet*

Steps

1. Enter search criteria: Employee ID, Last or First Name.

   You can enter search criteria in one or more of the fields. Partial ID or name searches are allowed.
2. Click Search.
   A list of persons matching the search criteria display below.
3. Click the radio button adjacent to the desired user and click Select.
   The user's identifying and login information populates the General section below.

Result

A user's identifying and login information is made available to the compensation administrator from directly within the application.

Cycle Dates

On the Configure Plans tab, General page, Compensation Administrators can set the Cycle Name, Cycle Description, and Start and Stop Dates for a compensation cycle.

Dates can be selected from Calendar pickers and must be entered in the format dd-Mmm-yyyy (e.g. 01-May-2012). The Stop Date cannot precede the Start Date, an alert will display if it is. Users can Cancel on the alert to clear out the dates and re-enter.

Configuring Cycle Dates

Prerequisite

The Start Date for the compensation planning cycle must precede the Stop Date.

Configure Plans** > **General** > **Cycle Dates

Steps

1. Complete the fields: Cycle Name, Cycle Description, Start and Stop Date.
2. Click Save.

Result

Compensation planning cycle dates are set for the compensation planning cycle.

Comp Plan Administration

Comp Plan Administration Overview

Compensation plans (basepay, bonus and stock) are made up of elements such as plan types, budgets, eligibility and proration rules, factors, targets and guidelines, all used for granting increases and awards. In Taleo Compensation, the elements and structure of compensation plans are stored in the database. Global and Compensation Administrators (administrators) can use the Plans page to perform compensation plan administration functions from directly within the application.

Administrators benefit from using the Plans page in association with the Configure Basepay, Bonus and Stock pages; providing them with a toolkit for administering and configuring compensation plans through the user interface. This saves time and effort compared to manually writing XML code and uploading plan files from outside the application.

The Plans page has the following sections for use in administering compensation plan files:

- *Upload Comp Plan from your Local System to CPS -* Use to upload a plan file from a local machine, map it to a compensation plan type (basepay, bonus or stock), and load it to the database. Once a plan is successfully uploaded its status is set to Loaded.
- *Manage Plans -* Use to Activate, Deactivate, Delete and Copy plans. When you activate a plan its status is set to Active. When budget processing is run against a plan its status is set to Deployed.
- *Download Comp Plan to Local File -* Use to download a copy of an XML plan file to a local machine, for any Loaded or Active plan that is stored in the database. This will include almost all the plan elements, but not guidelines as of Taleo Compensation Feature Pack 12B.
- *Test Plans -* This feature is available only to Taleo Global Administrators and is new in Taleo Compensation Feature Pack 12B. Use as a debugging tool for Loaded, Active and Deployed status plans. You can display and visually examine the plan XML, validate the code is correctly formed in accordance with standard XML specifications, ensure no plan elements are missing, check the code for errors and view error results.

Note: The Test Plans section should be available to the Global Administrator role, but not the Compensation Administrator. If the Test Plans section is not visible to the Global Administrator role, check the application configuration variable "Admin_Plans_Test_Dash. It should be set to "1" to turn it on.

The business process flow for administering and configuring new plans for a new cycle is as follows:

1. **Plan templates as a starting point.** For a new customer implementation use the delivered baseline plan files as a starting point. For an existing customer's next cycle implementation use the Plans page to download their plan documents from the prior cycle. Do not start coding from scratch with a blank XML file. Most plan elements require at least some value entered to be valid, and the potential for making errors is too great.
2. **Upload or copy needed plans.** Use the Plans page to upload a local copy of a plan document to the customer's zone. This could be a copy of the delivered baseline plan, or a backup copy documenting the configuration from a previous cycle. When plans are uploaded their status is set to Loaded. Another approach is to use the Plans page to make a copy of an already uploaded plan so you can edit it.
3. **Activate the plan.** Use the Plans page to activate the uploaded or copied plan. This is required before you can use the Configure Plans pages to edit the plan online. When the plan is activated its status is changed to Active. Plan elements (such as plan types, budgets, eligibility and proration rules, factors, targets and guidelines) are created in the database.
4. **Edit the plan as needed.** Use the Configure Plans pages (Basepay, Bonus or Stock) to make modifications to an existing, active plan. Edits you save on these pages are saved to the database.

5. **Run the budget processing on the plan.**Use the same Configure Plans pages to run the budget processing on the plan. This populates employee records with budget data and sets the plan status to Deployed.

6. **Test the Plan in Configure Plans pages.**You can use the Test Employee feature on the Configure Plans pages to check whether the modified plan generates expected results in an employee record.

7. **Test the plan on the Plans page.**When you open the Plans page the system reverse engineers the XML for and existing, active plans you modified in the Configure Plans pages. This enables you to use the debugging tools provided in the Test Plans section of the Plans page to further examine, validate and review/check a plan.

8. **Download a backup of the plan.**Use the Plans page to download a copy of the plan XML file to a local machine, to document the current configuration, for use as a backup, and to provide a starting point for the next planning cycle.

In similar fashion, you can use these features of the Plans and Configure Plans pages as ad hoc tools to upload, copy, activate, edit, test, deploy, download and delete compensation plans during the preparation of a customer zone for a planning cycle.

Plan Status Values Summary. Plan Status values are used to determine whether or not a plan is currently used to build the database and populate employee records:

- **Loaded -** When you upload a comp plan, the plan record and XML is uploaded to a database table, and the system sets the plan's status as Loaded. This is new as of Taleo Compensation Feature Pack 12B, in prior releases plan files were manually uploaded to the management server file directory.

- **Active -** When you activate a comp plan, the elements of the plan (plan types, budgets, eligibility and proration rules, factors, targets, guidelines, etc.) are created in the database, and the system sets the plan's status as Active. You can have more than one active Basepay, Bonus or Stock plan in the system at a time. Deactivating an active plan removes those elements from the database and brings the status of the plan back to Loaded.

- **Deployed -** When you use the Configure Plans (Basepay, Bonus or Stock) pages to run budget build processing on an active comp plan, data is populated for individual employees eligible for the plan, and the status is set to Deployed. The deployed comp plan is the one currently used by the system to populate employee records with planning and budget data. Deactivating a plan with Deployed status removes the planning and budget data in the employee records, as well as the other plan elements used to build the database, and bring the status of the plan back to Loaded.

Download Plans

Use the Download Comp Plan to Local File section to save a copy of a plan XML file to a local machine. Any Loaded, Active or Deployed plan can be downloaded. The file can be used to document the configuration for the current cycle, or serve as a template for use as a starting point for the next cycle. The downloaded plan XML includes plan elements (such as budgets, proration rules and eligibility rules, and guidelines).

Download Comp Plan to Local File

The following fields and buttons are available in the Download Comp Plan to Local File section:

Download Comp Plan to Local File Fields and Buttons	
Name	Description
Select a Plan Type	Use to specify the type of compensation plan file being downloaded: basepay, bonus or stock.

Download Comp Plan to Local File Fields and Buttons	
Name	Description
Select a Plan Name	Use to select the name of the specific plan document you want to download from the database.
Download	Use to initiate the download to a local machine. The system will prompt you to specify the download location. The downloaded plan XML file includes any changes you made to the plan using the Configure Basepay, Bonus or Stock pages.

Downloading a Comp Plan

Prerequisite

- You want to download a copy of the plan XML file to document the current configuration, or to use as template for editing.
- The specified plan you want to download can be in Loaded, Active or Deployed status.

Global Admin role* > *Configuration* > *Plans* > *[Download Comp Plan to Local File]

Comp Admin role* > *Configure Plans* > *Plans* > *[Download Comp Plan to Local File]

Steps

1. Select a Plan Type (e.g. basepay, bonus or stock).
   The system filters for any currently uploaded plans of that type, and displays their names in the Select a Plan Name selector.
2. Select a Plan Name from the list of uploaded plans of the selected type.
3. Click Download.
4. When prompted select a location for the file download.

Result

An XML file specification for the specified plan is downloaded to your local machine. This encapsulates all the elements modified in the Configure Plans pages.

Next Step

Use the downloaded plan file as a backup of the current configuration, or edit it and re-upload back to the system.

Upload Plans

Use the Upload Comp Plan from Local System to CPS section to load compensation plan files from a local machine to the database. This is useful when you need to upload the files that will serve as a starting point for configuring the system, whether from the baseline or from a prior cycle. At times you might also need to upload files that were edited offline.

When you upload a plan file the following happens:

- You map the file name to a plan type (basepay, bonus or stock).
- The identifying information and plan XML are stored in the database.
- The Plan status is set to Loaded.

Upload Comp Plan from Local System to CPS

The following fields and buttons are available in the Upload Comp Plans Local section:

Upload Comp Plan from Local System to CPS Fields and Buttons	
Name	Description
Select a Plan Type	Use to specify the type of compensation plan file being downloaded: basepay, bonus or stock.
Browse	Use to navigate to and select a plan file that you want to upload from a local machine.
Upload	Use to initiate the upload of the plan file from the local machine to the database. The plan is mapped to the selected plan type, plan details are stored in the database, and the plan status is set to Loaded.
Get Report	Use to view a system plan generation and error report.

Uploading a Comp Plan

Prerequisite

- You want to upload the files that will serve as a starting point for configuring the system, whether from the baseline or from a prior cycle, or to upload files that were edited offline.
- The plan must be a valid format for the server version.
- You cannot upload over a file of the same name. Delete the prior version of the file first.

Global Admin role > *Configuration* > *Plans* > *[Upload Comp Plan from Local System to CPS]*

Comp Admin role > *Configure Plans* > *Plans* > *[Upload Comp Plan from Local System to CPS]*

Steps

1. Select a Plan Type to map the plan file to: basepay, bonus or stock.
2. Browse to and select the local comp plan XML file from your local machine.

    a) Verify the selected filename in the display area to the left.

3. Click Upload to initiate loading of the file from the local machine to the database.
   The plan is mapped to the selected plan type, plan details are stored in the database, and the plan status is set to Loaded.
4. Optional. View the upload Status and click Get Report for a system plan generation and error report.

Result

The selected plan record and XML is stored in the database and the plan status is set to Loaded.

Next Step

- The plan must be activated to create the entities needed to build the database.
- Budget processing must be run to populate the employee records with data.

Manage Plans

Use the Manage Plans section to activate, deactivate, delete and copy uploaded comp plans. A list of comp plans with Loaded, Active and Deployed status is displayed in the Manage Plans text area. This provides a convenient user interface to administer the plans from within the application.

Configuration

The following fields and buttons are provided in the Manage Plans section:

Manage Plans Fields and Buttons	
Name	Description
Manage Plans	Use to view a list of all plans in the system with Loaded, Active or Deployed status. Displays the plan's File Name, Plan Name, Plan Type, Status and Description. Description displays the date and time stamp for the last action performed on the plan; such as Updated, Reverse Engineered or Copied. Also use the Manage Plans section to select an individual plan for activation, deactivation, deletion or copying.
Activate	Use to activate an uploaded comp plan in the database. Plan elements (such as plan types, budgets, eligibility and proration rules, factors, targets and guidelines) are created in the database. The plan status is set to Active. You can have multiple active basepay, bonus or stock plans.
Deactivate	Use to deactivate an active or deployed comp plan in the system. When you deactivate an active plan the elements (plan types, budgets, eligibility and proration rules, targets and guidelines) are removed from the database. When you deactivate a deployed plan the associated budget data in the employee records is also removed. The plan record and XML remain in the database, with status updated to Loaded.
Delete	Use to delete an uploaded plan record from the database, such as when you want to upload a plan of the same name. Only plans with Loaded status can be deleted. If a plan's status is Active or Deployed you must first deactivate the plan before deleting it.
Copy	Use to make a copy of a selected compensation plan and save it with a new file name, plan name and description.

Activating a Comp Plan

Prerequisite

- You must activate a plan before you can use the Configure Plans pages to modify it, or deploy (run budget processing on) it.
- The comp plan you want to activate must first be uploaded (have Loaded status).

Global Admin role > Configuration > Plans > [Manage Plans]

Comp Admin role > Configure Plans > Plans > [Manage Plans]

Steps

1. A list of the currently uploaded, activated and deployed comp plans is displayed in the Manage Plans section.
2. Select the checkbox to the left of the name of the plan you want to activate. It must currently have Loaded status.
3. Click Activate and view the Progress and Status displays.
    The Status updates to Active.

Result

Plan elements (plan types, budgets, eligibility and proration rules, factors, targets and guidelines) are created in the database to build the plan.

Next Step

Modify the plan, or run the budget process and deploy it, using the Configure Plans (Basepay, Bonus or Stock) pages.

Deactivating a Comp Plan

Prerequisite

*   Use to deactivate an active or deployed comp plan in the system.
*   A plan must be deactivated before it can be deleted.

Global Admin role > *Configuration* > *Plans* > *[Manage Plans]*

Comp Admin role > *Configure Plans* > *Plans* > *[Manage Plans]*

Steps

1. A list of the currently uploaded, activated and deployed comp plans is displayed in the Manage Plans section.
2. Select the checkbox to the left of the name of the active or deployed plan you want to deactivate.
3. Click Deactivate and view the Progress and Status.
    Status updates to Loaded.

Result

*   If the plan is Active status when deactivated plan elements (such as plan types, budgets, eligibility and proration rules, factors, targets and guidelines) are removed from the database.
*   If the plan is in Deployed status when deactivated, associated budget data in the employee records are also removed.
*   The plan record and XML remain in the database, with status updated to Loaded.

Copying a Comp Plan

Prerequisite

Use to make a copy of the plan XML from a selected plan; and save it with a new file name, plan name and description.

Global Admin role > *Configuration* > *Plans* > *[Manage Plans]*

Comp Admin role > *Configure Plans* > *Plans* > *[Manage Plans]*

Steps

1. A list of the currently uploaded, activated and deployed comp plans is displayed in the Manage Plans section.
2. Select the checkbox to the left of the name of the plan you want to copy.
3. Click Copy to create a new plan record in the database.
   Identifying information about the copied record appears at bottom line of grid in the Manage Plans text area; with editable fields for File Name, Plan Name and Description.
4. Enter a new File Name, Plan Name and Description for the copied plan.
5. Optional. You can click Plan Cancel before saving to stop the transaction.
6. Click Plan Save.
   The plan status is set to Loaded.

Result

A copy of the selected comp plan record and XML is placed in the database, with a new File Name, Plan Name and Description. The plan has Loaded status. It is not yet Active.

Next Step

- To make this an active plan you will need to activate it.
- If it is replacing another active plan you will need to deactivate that one first.

Deleting a Comp Plan

Prerequisite

- Use to delete an uploaded plan record from the database, such as when you want to upload a plan of the same name.
- Only plans with status Loaded may be deleted.
- If a plan's status is Active or Deployed you must first deactivate the plan before deleting it.

Global Admin role > ***Configuration*** > ***Plans*** > ***[Manage Plans]***

Comp Admin role > ***Configure Plans*** > ***Plans*** > ***[Manage Plans]***

Steps

1. A list of the currently uploaded, activated and deployed comp plans is displayed in the Manage Plans section.
2. Select the checkbox to the left of the name of the Loaded plan you want to delete.
3. Click Delete.
4. When prompted to confirm, click OK to proceed and view the Progress and Status Displays. You also have the option to Cancel the action from the dialog.
   Status is Deleting and Done.

Result

The selected comp plan record and XML is removed from the database.

Configure Plans - Calculators

Calculator Tool

The Calculator Tool enables the Compensation Administrator to configure and evaluate expressions and equations; and use them to define the eligibility rules, proration rules and compensation calculations within compensation plans. Calculators allow administrators to build the equations and expressions from directly within the application, rather than having to manually edit the code offline and upload files.

The Calculator Tool is available for use on the Basepay, Bonus and Stock pages under the Configure Plans tab. There are three versions of the calculator:

- **Eligibility Calculator -** Use for creating expressions with a java-like bean shell syntax to define eligibility rules.
- **Proration Calculator -** Use for defining proration rules consisting of a proration basis, date type and date range.
- **Compensation Calculator -** Use for creating arithmetic equations to define compensation calculations.

To use a calculator click on a calculator-specific button or link within one of the portlets of the Basepay, Bonus or Stock pages. This will open the appropriate calculator popup window. With all versions of the calculator, you can modify an existing calculation or rule, or create a new one.

Eligibility Calculator

Use the Eligibility Calculator to create or modify an eligibility rule used within a compensation plan. Define the eligibility rule as an expression. For example, in a basepay eligibility rule the expression "Employee_Status.equals("Active")" means "All Active Employees." An asterisk "*" in place of an expression means everyone is eligible. The type of eligibility rule is defined by the portlet (i.e. increase type, budget, factor or target) from which the calculator is accessed. With the Eligibility Calculator you can perform these functions:

- Select an existing rule to modify from the compensation plan, or create a new one.
- Select an existing data dictionary variable from the Variables window to use within an expression.
- Edit the equation directly in the main calculator entry window.
- Use the calculator virtual keypad to enter numbers, arithmetic operators, and logical operators.
- Validate the syntax of the calculation.
- Save a new equation or a modification to an existing equation.

The Eligibility Calculator is available in the following areas of the Configure Plans tab:

Subtab	Portlets
Base Pay	Increase Types, Budgets
Bonus	Factor Groups, Targets
Stock	Increase Types, Budgets

Eligibility Calculator Features

The Eligibility Calculator has the following features:

Name	Description
Variables Search	A text box for entering a name, or partial name, of a data dictionary variable to search for it in the list below.
Variables window	Displays the data dictionary variables that are available for the administrator to use in creating or modifying a rule or expression. Click and drag existing variables into the Main Entry area to be incorporated in the new or existing expression. You cannot create or modify variables in a calculator, you use them to build an expression or rule.
Main Entry window	This large text area is where you enter or modify the expression. Enter text by either using your keyboard or the virtual keyboard on the calculator. When you click a variable in the Variables window, the mouse insertion in the Main Entry window is at the end of the variable. The window becomes scrollable when the rule or expression exceeds the initial display space.
Status	Use to review, edit or enter the status (active or inactive) of whether the eligibility rule is active in the plan and will run.
Boolean/Rounding/Precision	In the Eligibility Calculator the user cannot select the data type (it is fixed as Boolean), precision or the rounding rule.
Virtual Keypad	Click the keys in the virtual keypad to enter the corresponding number, arithmetic operator or logical operator into the cursor location in the Main Entry window.
Save	Saves changes to either a new or modified rule specific calculation.
Clear	Deletes new text entered in a field and returns it to its previous state.
Validate	Displays the line(s) with the syntax for the expression or rule. Highlights any errors with a different color text.
Help	Displays help text in a scrollable window.

Proration Calculator

Use the Proration Calculator to create or modify a proration rule used within a compensation plan. The proration rule is associated to the basepay increase type or bonus budget from which the calculator is accessed. To create or modify a rule, define the proration basis, date type and date range. With the Proration Calculator you can perform these functions:

- View or enter a text description for a rule.
- View or enter a frequency basis (e.g. daily, weekly, monthly).

- View or enter a date type (e.g. hire date, job entry date).
- View or enter a date range.
- Save a new rule or a modification to a rule.

The Proration Calculator is available in the following areas of the Configure Plans tab:

Subtab	Portlets
Base Pay	Increase Types
Bonus	Budget

Proration Calculator Features

The Proration Calculator has the following features:

Name	Description
Description	A text box for entering a short description of the proration rule.
Basis	The frequency basis to be used in calculating the proration (Daily, Weekly, Monthly, etc.).
Date Type	The date type to be used in calculating the beginning of the proration (Hire Date, Job Entry Date, etc.)
Date Range (From/To)	The start and end dates of the compensation period (cycle) being prorated.
Status	Use to review, edit or enter the status (active or inactive) of whether the eligibility rule is active in the plan and will run.
Save	Saves changes to either a new or modified rule specific calculation.
Clear	Deletes new text entered in a field and returns it to its previous state.

Compensation Calculator

Use the Compensation Calculator to create or modify arithmetic equations used within a compensation plan's budgets and guidelines. For example, the bonus budget calculation "Current_Annual_Salary X 3.5/100" means "a bonus of 3.5 % of current annual salary." With the Compensation Calculator you can perform these functions:

- Select an existing equation to modify from the compensation plan budget or guideline, or create a new one.
- Select an existing data dictionary variable from the Variable window to use within an equation.
- Edit the equation directly in the main calculator entry window.
- Use the calculator virtual keypad to enter numbers, arithmetic operators, and logical operators.
- Validate the syntax of the calculation.
- Save a new equation or a modification to an equation.

The Compensation Calculator is available in the following areas of the Configure Plans tab:

Subtab	Portlets
Base Pay	Budgets, Guideline Values
Bonus	Budgets, Guideline Values
Stock	Budgets, Guideline Values

The Compensation Calculator has the following features:

Name	Description
Name Field	A text box for entering a title for a new equation or to see the name of an existing equation.
Variables window	Displays the data dictionary variables that are available for the administrator to use in creating or modifying an equation. Click and drag existing variables into the Main Entry area to be incorporated in the new or existing equation. You cannot create or modify variables in a calculator, you use them to build an equation.
Main Entry window	This large text area is where you enter the equation. Enter text by either using your keyboard or the virtual keyboard on the calculator. When you click a variable in the Variables window, the mouse insertion in the Main Entry window is at the end of the variable. The window becomes scrollable when the equation exceeds the initial display space.
Virtual Keypad	Click the keys in the virtual keypad to enter the corresponding number, arithmetic operator or logical operator into the cursor location in the Main Entry window.
Boolean/Rounding/Precision	The user must select the data type, precision and rounding rule for the variable.
Save	Saves changes to either a new or modified calculation.
Clear	Deletes new text entered in a field and returns it to its previous state.
Validate	Displays the line(s) with the syntax for the equation. Highlights any errors with a different color text.
Evaluate	Displays the equation so the user can enter values and run the equation in order to see results.

Name	Description
Help	Displays help text in a scrollable window.

Configure Base Pay Plan

Configure Base Pay Plan

The functionality on the Basepay page provides Compensation Administrators a tool to select an active basepay plan and modify its components. They can create increase types, assign budgets and budget values, define guidelines and guideline values, and create eligibility and proration rules for the selected plan. This allows administrators to perform these functions from directly within the application and reduces the risk of introducing errors in the plan code. Modifications made to a plan on the Basepay page write back to the database and the modified plan XML can be downloaded from the Plans page.

Compensation administrators benefit from using the Basepay page in association with the Plans page; providing them a toolkit for administering and configuring basepay plans through the user interface:

1. Use the Plans page to upload (if needed) and activate a basepay plan.
2. Use the Basepay page to modify/edit the plan.
3. Use the Basepay page to run the budget for the plan to populate employee records.
4. Use the Basepay page's Test Employee function to check whether the plan modifications create valid employee data.
5. Use the Plans page to download a copy of the plan XML to document the current configuration and provide a backup.

Basepay plans are made up of increase types, guidelines and budgets. There can be one or more basepay plan per customer implementation. A basepay plan can have one or more increase types (Merit, Lump Sum, Promotion, etc.). There can be one set of guidelines per increase type. Guidelines for an increase type can be different for different budget bases.

Portlets on the Basepay page are collapsible and remain empty until a plan name or component is selected from a drop-down. The Basepay page contains the following portlets and sections:

- **Plan Details -** Use the Plan Name selector to choose a plan for modification from a list of the active basepay plans in the database. Once an active plan is selected, Plan Details provides entry fields for the plan name and description.
- **Increase Types -** Use to display or enter the name, description, sequence number and whether the selected increase is required for submission. It also provides the ability to edit the eligibility and proration rules for the basepay increase type.
- **Budgets -** Use to display or enter the name, description, basis, and selection of increase types. It also provides the ability to edit basepay budget calculations and budget eligibility rules. Budget values may be based on a calculation or defined using a value basis and lookup matrix.
- **Budget Values -** Use to display or enter each value for the selected budget, if the budget is defined using a value basis and lookup matrix.
- **Guidelines -** Use to display or enter the guideline name and description. Define whether the guideline is calculated; or looked up in a matrix having a row basis, column basis, a column division setting, and an optional selection for the use of floating point performance ratings. For example, a lookup guideline might have a row basis of Salary Grade, a column basis of Performance Rating, and a Divide Columns element of Min-Max. Guidelines are used by managers as a reference point when planning basepay awards for their employees.
- **Guideline Values -** Use to display or enter each increase guideline value for each selected budget basis value.
- **Create/Modify Basepay Budgets -** Use to run budget processing on and deploy the selected active basepay plan.
- **Upload Guidelines -** Use to upload basepay guidelines in a TXT file for use in modifying a plan.
- **Download Guidelines -** Use to download basepay guidelines in a TXT file to document the current configuration of the guideline values and provide a backup.
- **Test Employee -** Use to test a selected basepay plan and verify valid employee records are created.

Note: The Test Employee section is intended to be available to users with the Compensation Administrator role. If it is not visible contact your Taleo Services or Support representative.

The layouts and information provided in this section are examples of common configuration. Actual configuration and information can vary based on your organization's basepay plan.

Plan Selection and Details

During preparation for a new compensation cycle it may become necessary to modify an active basepay plan for the new cycle. The Plan Name selector at the top of the Basepay page provides administrators a list of the active basepay plans in the database from which to select the plan for modification. The Plan Details and other portlets on the page are collapsible and remain empty until a plan name is selected from the drop-down. Once an active plan is chosen the system displays information specific to that plan in the Plan Details portlet, and in the selectors for the other portlets.

To specify the plan you want to modify choose it in Plan Name and click Select. The system expands the Plan Details portlet and provides entry fields for the plan name and description.

Configuration

The following fields and buttons are provided in the Plan Details portlet.

Plan Details Fields and Buttons	
Name	Description
Plan Name	Displays the plan name for the selected active plan. Use to modify as needed.
Description	Displays the description for the selected active plan. Use to modify as needed.
Cancel	Use to revert any unsaved entries and changes to the previous saved values.
Save	Use to save the current entries and changes to the database.

Increase Types Portlet

A basepay plan can have one or more increase types (e.g. Merit, Lump Sum or Promotion). In the Increase Types portlet the compensation administrator chooses an increase type associated with the previously selected active basepay plan, so they can view and modify increase type details.

The Increase Types portlet provides entry fields for the name, description, and type. It also provides the ability to edit the eligibility and proration rules for the basepay increase type.

Configuration

The Increase Types portlet provides the following fields and buttons.

Increase Types Fields and Buttons	
Name	Description
Salary Increase Type	Use the dropdown list to choose an increase type already defined or associated with the selected basepay plan. For example, you might want to choose an increase type because you want to review its elements or make changes to it. You can also add an increase type to the selected plan by choosing Create New from the dropdown list.
Select	Use to select the chosen increase type and populate the other fields in the portlet with increase type details, or to make the fields in the portlet editable for creating a new increase type.
Delete	Use to remove the chosen increase type from the plan.
Increase Type Name	Use to display or enter a unique, client specific name for the increase type. This can differ from the label in the Salary Increase Type dropdown.
Description	Use to display or enter a client specific description of the increase type.
Type	Taleo predefines certain types of basepay increases for system processing. Use the Type field to display or enter a mapping for the chosen Salary Increase Type value to a Taleo predefined Type of pay increase.
Eligibility Calculator	Use to enter an expression for an eligibility rule that affects the selected increase type.
Proration Calculator	Use to enter a proration rule that affects the increase type displaying when the calculator is opened.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Modifying an Increase Type

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Increase Types]

Steps

1. Choose an existing increase type from Select Increase Type.
2. Click Select.
   Increase type details populate the fields in the portlet.
3. Edit the Increase Type Name, Description and Type as needed.
4. Click Proration Calculator or Eligibility Calculator to view the existing calculations affecting the proration or eligibility rule associated with the increase type. Edit as needed.
5. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Increase Types for the selected active basepay plan are displayed, edited as needed, and changes saved to the database.

Creating an Increase Type

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Increase Types]

Steps

1. Choose Create New from Select Increase Type.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Enter the new Increase Type Name, Description and Type.
4. Click Proration Calculator to enter a new proration rule, or Eligibility Calculator to enter an expression for an eligibility rule, associated with the new increase type.
5. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

A new Increase Type for the selected active basepay plan is created and changes saved to the database.

Deleting an Increase Type

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Increase Types]

Steps

1. Choose an existing increase type from Select Increase Type.
2. Click Delete.

Result

The selected Increase Type is removed from the selected active basepay plan.

Budget Portlet

A basepay plan can have one or more budgets. Budgets can be assigned to one or more increase types. In the Budgets portlet the compensation administrator chooses a basepay budget associated with the previously selected active basepay plan. They can also add a budget to a plan. The administrator can view, edit and enter budget details, as well as the eligibility rule and basepay calculation for a budget. The Budget portlet is the first of two portlets used to define basepay budgets, the second being the Budget Values portlet.

A basepay budget's value may be either calculated, or defined using a value basis, but not both:

- A calculated budget value is entered as an equation using the Calculator function on the Budget portlet.
- For a value basis-defined budget, the value basis is first defined on the Budget portlet. Then the actual values (budget percentages) for each basis must be entered in a matrix on the Budget Values portlet.

Notes:

1. In the case where a budget calculation and a budget value basis are both entered in the system, the system uses the setting of the Calculation checkbox to toggle back and forth between the two methods to run budgets. They can't both be used at the same time.
2. When a basepay plan is saved and downloaded, and then re-uploaded, both the original calculations and value basis definitions still exist in the plan, and their use can be toggled with the Calculation checkbox in the Budget portlet.
3. If you begin by using a value basis definition, and change to using calculated, the original values entered in the Budget Values portlet are still visible in the matrix. If you want to clear them you must click Set Budget Values in the Budgets portlet.
4. If you are using a calculated budget then you should also be using calculated guidelines. Similarly, if you are using a basis-defined matrix for budgets you should also be using a basis defined matrix for guidelines.

Configuration

The Budgets portlet provides the following fields and buttons.

Budgets Fields and Buttons	
Name	Description
Select Budget Name	Use to choose an existing budget for the selected base pay plan, or choose Create New to add a budget to the plan.
Select	Use to populate the budget details fields with information about the chosen budget, or to make data entry fields available for creating a new budget.
Delete	Use to remove a budget from the selected basepay plan.
Budget Name	Use to edit or enter a client specific name for the budget. This value displays in the Budget Pocket selectors on the Planning and Budget Roll-up pages.
Description	Use to edit or enter a client specific description for the budget.

Budgets Fields and Buttons	
Name	**Description**
Eligibility Calculator	Use to review, enter or modify an expression for an eligibility rule that affects the selected budget. When the Eligibility Calculator opens the system displays the existing expression, if any.
Manage Increase Types/ Assigned/Available	Use to associate the budget with one or more increase types for the basepay plan. Existing increase types for the plan are displayed in Available. Existing increase types associated with the budget are displayed in Assigned. To associate the budget with an increase type, highlight the increase type in Available and use the Arrow button to move it into Assigned. To disassociate (remove) a budget from an increase type, highlight the increase type in Assigned and use the Arrow button to move it into Available.
Calculate	Use this checkbox to specify whether or not the basepay budget is calculated: • When it is cleared the budget is not calculated using an equation. Instead, the system displays the Value Basis and Enforce Value Basis fields in the Budget portlet. Use these fields to define a value basis (such as Country, Business Unit or Salary Grade) for the budget, which displays in a matrix in the Budget Values portlet. • When it is selected the guideline is calculated. The Value Basis and Enforce Value Basis fields in the Budget portlet are made unavailable for entry. The Budget Values portlet displays the structure for a matrix but it is not used to define the basepay budget.
Calculation	This field activates when the Calculate checkbox is selected. It displays the existing calculation for a basepay budget, if any. For example, an equation might be "Current Salary * .020".
Basepay Calculator	This field activates when the Calculate checkbox is selected. Use to enter an equation for a basepay budget calculation that affects the budget displayed in this portlet.
Basis	This field activates when the Calculate checkbox is cleared. Use to edit or enter the Budget Value Basis, if any, by entering the name of the data dictionary variable to be used as the basis (e.g. Country, Business Unit, Salary Grade, etc.). For example, if Country is the basis, and the Enforce Value Basis checkbox is also selected, then in the planning pages a separate budget is displayed for each country. In the Budget Values portlet each basis value populates a role in a matrix used to define the budget percentages for each basis value.
Enforce Value Basis	This field activates when the Calculate checkbox is cleared. Use to indicate whether to enforce the budget value basis. In most situations this checkbox will be cleared to set it to false, or off. In that case only one budget is displayed in the planning pages. Select the checkbox to set this value to true, or on, when enforcing the budget basis as a way to cause the appearance of a number of budgets seen in the Budget Pocket. (For example, if you are

Budgets Fields and Buttons	
Name	Description
	using a Budget Basis Value of Country, then select this checkbox and the system will display a separate budget for each country.)
Apply Proration to Totals	Use to indicate whether or not the budget has a proration rule applied. Clear the checkbox if there is no proration rule applied, and the budget is calculated using regular amounts. Select the checkbox if you are applying a proration rule to the budget, so the budget is calculated using the prorated amounts.
Cancel (in association with Save)	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.
Set Budget Values	Use this button after you have finished modifying details in the Budgets portlet, and before moving on to the Budget Values portlet. Use it to activate a process that pulls up every employee in the database and checks which value basis they are a member of (e.g. Country, Salary Grade, Business Unit). The process then builds the structure for the Budget Values portlet. When you activate it a popup message states "Do you want to process the database for current employee budget values? This is a long process."
Cancel (in association with Set Budget Values)	Use to stop the Set Budget Values process if it is stuck while running.

Modifying a Calculated Budget

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Budgets]

Steps

1. Choose an existing budget for the plan from Select Budget Name.
2. Click Select.
   Budget details populate the fields in the portlet.
3. Edit the Budget Name, Description and Basis as needed.
4. Click Eligibility Calculator to view or edit the eligibility rule associated with the increase type.
5. In Manage Increase Types, associate the selected budget with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
6. Ensure the Calculate checkbox is selected.

   The Calculator and Basepay Calculator fields are activated. The Basis and Enforce Value Basis fields are unavailable for entry.
7. Click Basepay Calculator to view or edit the basepay budget calculation associated with the budget. For example, "Current_Salary * .020".
   The equation entered and saved using the Basepay Calculator tool displays in the Calculation field.

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8. Use Apply Proration to Totals to indicate whether or not a proration rule is applied to the budget totals.

9. Click the Set Budget Values button to initiate processing on the database for current employee budget values. The process also clears any previous value basis-defined entries in the matrix on the Budget Values portlet.

   When you initiate Set Budget Values a popup message states "Do you want to process the database for current employee budget values? This is a long process." In a large database this can take several minutes to run.

10. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

A calculated budget for the selected active basepay plan is displayed, edited as needed, and changes saved to the database.

Next Step

- For a calculated basepay budget there is no followup data entry needed on the Budget Values portlet.
- To clear any previous data entry for a lookup budget in the Budget Values portlet, you must run Set Budget Values from the Budgets portlet.

Modifying a Lookup Budget

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans > Base Pay > [Budgets]

Steps

1. Choose an existing budget for the plan from Select Budget Name.

2. Click Select.
   Budget details populate the fields in the portlet.

3. Edit the Budget Name and Description as needed.

4. Click Eligibility Calculator to view or edit the eligibility rule associated with the increase type.

5. In Manage Increase Types, associate the selected budget with one or more increase types by moving the desired increase type name(s) from Available to Assigned.

6. Ensure the Calculated checkbox is cleared.
   The Calculation and Basepay Calculator fields are made unavailable for entry. The Value Basis and Enforce Value Basis fields are activated.

7. Verify and edit the Value Basis and Enforce Value Basis fields as needed.

8. Use Apply Proration to Totals to indicate whether or not a proration rule is applied to the budget totals.

9. Click the Set Budget Values button to initiate a process that pulls up every employee in the database and checks which value basis they are a member of (e.g. Country, Salary Grade, Business Unit). Then it builds the structure for the basepay value basis matrix in the Budget Values portlet.

   When you initiate it a popup message states "Do you want to process the database for current employee budget values? This is a long process." In a large database this can take several minutes to run.

10. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Budget details for the selected active basepay plan are displayed, edited as needed, and changes saved to the database.

Next Step

Use the Budget Values portlet to enter the budget basis values (such as percent of the total budget allocated to each country).

Creating a Calculated Budget

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Budgets]

Steps

1. Choose Create New from Select Budget Name.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Enter the Budget Name and Description.
4. Click Eligibility Calculator to enter the eligibility rule associated with the increase type.
5. In Manage Increase Types, associate the new budget with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
6. Select the Calculate checkbox.

   The Calculator and Basepay Calculator fields are activated. The Basis and Enforce Value Basis fields are unavailable for entry.
7. Click Basepay Calculator to enter the basepay budget calculation associated with the budget. For example, "Current_Salary * .020".
   The equation entered and saved using the Basepay Calculator tool displays in the Calculation field.
8. Use Apply Proration to Totals to indicate whether or not a proration rule is applied to the budget totals.
9. Click the Set Budget Values button to initiate processing on the database for current employee budget values. The process also clears any previous value basis-defined entries in the matrix on the Budget Values portlet.

   When you initiate Set Budget Values a popup message states "Do you want to process the database for current employee budget values? This is a long process." In a large database this can take several minutes to run.
10. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

A calculated budget for the selected active basepay plan is displayed, edited as needed, and changes saved to the database.

Next Step

- For a calculated basepay budget there is no followup data entry needed on the Budget Values portlet.
- To clear any previous data entry for a lookup budget in the Budget Values portlet, you must run Set Budget Values from the Budgets portlet.

Creating a Lookup Budget

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Budgets]

Steps

1. Choose Create New from Select Budget Name.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Enter the Budget Name and Description.
4. Click Eligibility Calculator to enter the eligibility rule associated with the increase type.
5. In Manage Increase Types, associate the new budget with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
6. Ensure the Calculate checkbox is cleared.

   The Calculation and Basepay Calculator fields are made unavailable for entry. The Value Basis and Enforce Value Basis fields are activated.
7. Enter the Value Basis (e.g. Country or Business Unit or Salary Grade) if one is used.
8. Select the Enforce Value Basis checkbox if a value basis is used.
9. Use Apply Proration to Totals to indicate whether or not a proration rule is applied to the budget totals.
10. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The new budget for the selected active basepay plan is created and saved to the database.

Next Step

If a budget basis is used in the budget (such as Country), use the Budget Values portlet to enter the budget basis values (such as percent of the total budget allocated to each country).

Deleting a Budget

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Budgets]

Steps

1. Choose an existing budget from Select Budget Name.

2. Click Delete.

Result

The selected budget is removed from the selected active basepay plan.

Budget Values Portlet

The Budget Values Portlet provides a rollbar layout having a tab for each budget defined in the basepay plan. The portlet allows the compensation administrator to edit, for each value basis-defined budget, the percent of the company's total payroll to be used for calculating the basepay increase budget. This can be done for each of the organization's segments used as a budget basis, if any. Example bases are by country, business unit, or salary grade. Country is the most usual budget basis. The Budget Values portlet is the second of two portlets used to define basepay budgets, the first being the Budgets portlet.

Each budget tab in the portlet contains a grid to aid the compensation administrator in setting up the budget. These grids are for use with value basis-defined budgets. Each grid has four columns: Budget, Total Payroll, Budget % and Budget Amount. Only Budget % is editable. The Budget and Total Payroll columns are populated by running the Set Budget Values process in the Budgets portlet. A row is displayed for each budget basis element. When the administrator enters a budget percent for a row and tabs out of the field, or clicks another field, the system calculates and displays the budget amount for the row. When the user saves their entries the system saves results to the database.

If you begin by using a value basis definition, and change to using calculated, the original values entered in the Budget Values portlet are still visible in the matrix. If you want to clear them you must click Set Budget Values in the Budgets portlet.

Example:

An organization wants to base a basepay merit increase budget on country, so the budget basis is set to Country. In the Budget Values portlet the Merit tab displays the countries in the budget, and calculates and displays the total payroll for each country. The Budget % column is editable so the administrator can edit or enter the percentages of each country's payroll to be used in determining the merit increase budget amount for each country.

▼ Budget Values

| Merit Budget | Promo/Adjustment Budget | Budget A | Budget B |

Budget	Total Payroll (USD)	Budget %	Budget Amount
	0.000000	0.00	0.000000
BOL	161,989.500000	4.00	6,479.580000
CAN	1,026,005.072133	5.00	51,300.253607
FRA	174,870.000000	6.00	10,492.200000
IND	1,700,881.660000	7.00	119,061.716200
USA	1,116,333,712.500000	3.00	33,490,011.375000
Total	1,119,397,458.732133	3.010000	33,677,345.124807

Cancel   Save

Configuration

The Budget Values portlet provides the following fields and buttons.

Budget Value Field or Button	
Name	Description
Budget	Displays the values for the budget basis used. For example, if Country is the basis then the rows in the column display the countries in the customer's implementation.
Total Payroll	Displays the total payroll (employee basepay wages) for the basis value (e.g. total payroll for each country).
Budget Percent	Use to edit or enter the percentage of the total payroll amount to be used to calculate the basepay budget amount. When a number is entered and the user tabs out of the field, or clicks another field, the Budget Amount is dynamically calculated and displayed.
Budget Amount	Displays the amount planned for the basepay budget, for each basis value (e.g. basepay budget amount for each country).
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Entering Budget Values

Prerequisite

- First select an active basepay plan to modify.
- Use the Budget portlet to enter budget details and specify the budget is defined by value basis.
- Run the Set Budget Values process in the Budget portlet.

Configure Plans > *Base Pay* > *[Budget Values]*

Steps

1. Review the existing Budget basis (if any) and Value Basis information.

   This information is populated when you enter Budget details in the Budget portlet and then run the Set Budget Values process.

2. Enter a budget percentage for each budget basis value (e.g. each country if the basis is Country).

   This sets the percentage of payroll you want to target for a country's (or other bases) budget.

   The system calculates the Budget Amount for the country or other basis.

3. Click Save.

Result

The changes are saved to the database.

Next Step

Run the budget processing, using the functionality in the Create/Modify Basepay Budgets section, to populate employee records with budget data.

Guidelines Portlet

During the compensation planning process managers need guidelines to follow when making basepay increase decisions for their employees. A basepay guideline can be calculated, or it can be a row and column defined matrix, providing guidance for the level of basepay increase to be granted an employee based on factors such as performance, salary grade or position-in-range. A common example is a merit matrix, as shown below. In the Guidelines portlet the compensation administrator chooses a basepay guideline associated with the previously selected active basepay plan, so they can view and modify guideline details. The administrator can also add a guideline to the plan.

A basepay plan can have one or more increase types (e.g. Merit, Lump Sum or Promotion). There can be one set of guidelines per increase type. The guidelines portlet has entry fields for the guideline name and description, and defining whether or not the guideline is calculated or looked up in a matrix:

- A calculated guideline provides guidance for the level of basepay increase to be granted an employee based on an equation.
- A guideline lookup matrix provides guidance based on a row basis, a column basis and a column division setting.

The matrix or table for either type displays on the Guideline Values portlet, and is dynamically generated based on the guideline structure defined in the Guidelines portlet. Guidelines are applied to employees when budgets are run.

Example:

The following table represents a guideline for an organization that wants a basepay merit increase to be defined on an employee's performance ratings and Compa Ratio. The Compa Ratio is the employee's current basepay salary divided by the midpoint of their salary range. For each rating category, a percent of the increase can be entered to set minimum and maximum boundaries for base pay changes. In such a guideline the following compensation goals are enforced:

- Low performers receive lower increases than high performers.
- Those with performance ratings below expectations receive no increase.
- For employees with comparable performance ratings, those whose current basepay is below midpoint receive slightly higher increases than those whose basepay is already at or above the midpoint of the range.

Compa Ratio	0 to 80%	80 to 90%	90 to 100%	100 to 120%
	Min - Max	Min - Max	Min - Max	Min - Max
Below	0.00% - 0.00%	0.00% - 0.00%	0.00% - 0.00%	0.00% - 0.00%
Meets	2.75% - 3.00%	2.50% - 2.75%	2.25% - 2.50%	2.00% - 2.25%
Exceeds	3.75% - 4.00%	3.50% - 3.75%	3.25% - 3.50%	3.00% - 3.25%
Frequently Exceeds	4.75% - 5.00%	4.50% - 4.75%	4.25% - 4.50%	4.00% - 4.25%

Configuration

The Guidelines portlet provides the following fields and buttons.

Guidelines Fields and Buttons	
Name	Description
Select Guideline Name	Use to choose from a list an existing guideline defined in the selected basepay plan, or choose an option to create a new guideline.
Select	Use to populate the detail fields in the Guidelines portlet with configuration information for the selected guideline, or make the detail fields editable for a new guideline.
Delete	Use to delete a guideline from the basepay plan.
Guideline Name	Use to edit the name for a selected existing guideline or enter a name for a new one.
Description	Use to edit the description for a selected existing guideline or enter a description for a new one.
Guideline Increase Type/ Assigned/Available	Use to associate the guideline with one or more increase types for the basepay plan. Existing increase types for the plan are displayed in Available. Existing increase types associated with the guideline are displayed in Assigned. To associate the guideline with an increase type, highlight the increase type in Available and use the Arrow button to move it into Assigned. To remove a guideline from an increase type highlight the increase type in Assigned and use the Arrow button to move it into Available.
Calculate	Use this checkbox to specify whether or not the guideline is calculated: • When it is cleared the guideline is not calculated using equations. Instead, the system displays the Row Basis, Column basis, Divide Columns and Position in Range fields in the Guidelines portlet. Use these fields to define a row and column value basis for the guideline, which displays in a matrix in the Guideline Values portlet. • When it is selected the guideline is calculated. The row and column basis, Divide Columns and Position in Range entry fields in the Guidelines portlet are made unavailable for entry. A default matrix for entering guideline equations for the minimum, target and maximum values is displayed in the Guideline Values portlet. Guideline values are entered using a Calculator function in that portlet.
Row Basis	This field activates when the Calculate checkbox is cleared. Use to modify the row basis of a selected guideline, or choose the row basis for a new guideline. Valid values are None, Band, Grade and Performance Rating. For guidelines based on performance ratings it is possible to use different performance rating scales for different guidelines and increase types.
Guideline Rating Selector	This field activates when the Calculate checkbox is cleared and the row basis is Performance Rating. Use to select the rating scale to be used. Valid values are Default Performance Scale, Floating Point Scale, PM to Comp SP4, PM to Comp SP3, and PM to Comp SP2.

Guidelines Fields and Buttons	
Name	**Description**
Use Floating Point Performance Ranges	This field activates when the Calculate checkbox is cleared and the row basis is Performance Rating. If checked the plan calls for performance rating values in floating point format. Floating Point performance rating values are often used when the rating is applied directly in numeric calculations. Typically the scale is defined with a range such as 0.00 to 5.00. An employee can be assigned any of the 500 values in this range such as 4.12. This number can be used directly as a factor in a merit increase, bonus amount or a stock award.
Column Basis	This field activates when the Calculate checkbox is cleared. Use to modify the column basis for a selected guideline, or choose the column basis for a new guideline. Valid values are Single Column, Two Columns, Terciles, Terciles + Outside Min/Max, Quartiles, Quartiles + Outside Min/Max, Quintiles, and Quintiles + Outside Min/Max.
Divide Columns	This field activates when the Calculate checkbox is cleared. Use to modify the column division of a selected guideline, or choose the column division for a new guideline. Defines if and how the guideline columns are sectioned based on salary range. Valid values are Not Applicable, Target, Min-Max, and Min-Target-Max.
Position in Range	This field activates when the Calculate checkbox is cleared. Basepay guidelines can be created using the position-in-range options of "Compa Ratio" or "Percent of Range". Use to select the position in range lookup value. Valid values include Not Applicable, Percent of Range and Compa Ratio. Although Range Penetration appears on selectors it is not yet supported.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Guidelines Based on Performance to Compensation Integration

Getting guidelines to update when using Performance to Compensation integration requires the following setup considerations:

- Budget names must be unique across the currently deployed Basepay plans.
- The data dictionary entries for the following rating scales must have the budget names specified in the Selector fields and the increase type names specified in the Selector2 fields: Performance_Rating_Value_Name, Employee_Goal_Rating, and Competency_Goal_Rating.
- This should be the setup if there are multiple basepay plans deployed, or one plan with multiple budgets.
- A single plan with a single budget can use just the increase type name in the Selector fields.

Modifying a Calculated Guideline

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans > *Base Pay* > *[Guidelines]*

Steps

1. Choose an existing guideline for the plan from Select Guideline Name.
2. Click Select.
   Guideline details populate the fields in the portlet.
3. Edit the Guideline Name and Description as needed.
4. In Guideline Increase Types, associate the selected guideline with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
5. Ensure Calculate is selected, to specify the guideline is calculated using equations.
   The Row and Column Basis, Divide Columns and Position in Range fields are made unavailable for entry. A default matrix for entering the guideline equations for the minimum, target and maximum values appears in the Guideline Values portlet.
6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Calculated guideline details for the selected active basepay plan and guideline are displayed, edited as needed, and changes saved to the database.

Next Step

Use the Guideline Values portlet to enter calculations into the guideline values matrix.

Modifying a Lookup Guideline

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans > *Base Pay* > *[Guidelines]*

Steps

1. Choose an existing guideline for the plan from Select Guideline Name.
2. Click Select.
   Guideline details populate the fields in the portlet.
3. Edit the Guideline Name and Description as needed.
4. In Guideline Increase Types, associate the selected guideline with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
5. Ensure Calculate is cleared, to specify the guideline is defined in a lookup matrix.

   The Row and Column Basis, Divide Columns and Position in Range fields are made available for entry. You'll use these fields to define the lookup matrix that will appear in the Guideline Values portlet.
6. Review and select the Row Basis, as needed. Valid values include Performance Rating, Grade, Band and None.

   - If you select None, Grade or Band proceed to step 9.
   - If you select Performance Rating the Guideline Rating Selector and Use Floating Point Rating Performance Ranges fields activate. Proceed to step 7.
7. Select the guideline rating scale to be used in the guideline lookup matrix.

Valid values include the following:

- Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds.
- Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 0.00 to 5.00).
- PM to Comp SP4 - Indicates the performance rating scale is imported from the customer's Taleo Performance SP4 application.
- PM to Comp SP3 - Indicates the performance rating scale is imported from the customer's Taleo Performance SP3 application.
- PM to Comp SP2 - Indicates the performance rating scale is imported from the customer's Taleo Performance SP2 application.

8. In the Use Floating Point Performance Ranges checkbox specify whether or not a floating point performance rating scale is used in the guideline.

- Leave it cleared if they are not used.
- Select it if they are used.

9. Use Column Basis to specify the column basis to be used in the lookup matrix on the Guideline Values portlet. Valid values range from one to as many as seven columns (i.e. Quintiles plus Outside Min and Max).

10. Use Divide Columns to specify the column division used in the lookup matrix on the Guideline Values portlet. Valid values include Target, Min-Max, Min-Target-Max, and Not Applicable.

11. Use Position in Range to specify whether and how it is used in the guideline. Valid values include Not Applicable, Percent of Range and Compa Ratio. Although Range Penetration appears on selectors it is not yet supported. .

12. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Lookup Guidelines for the selected active basepay plan are displayed, edited as needed, and changes saved to the database.

Next Step

Use the Guideline Values portlet to enter the lookup guideline values in the matrix.

Creating a Calculated Guideline

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Guidelines]

Steps

1. Choose Create New from Select Guideline Name.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Enter the Guideline Name and Description.
4. In Guideline Increase Types, associate the selected guideline with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
5. Select Calculate to specify the guideline is calculated using equations.

The Row and Column Basis, Divide Columns and Position in Range fields are made unavailable for entry. A default matrix for entering the guideline equations for the minimum, target and maximum values appears in the Guideline Values portlet.

6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The new guideline for the selected active basepay plan is created and saved to the database.

Next Step

Use the Guideline Values portlet to enter calculations into the guideline values matrix.

Creating a Lookup Guideline

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Guidelines]

Steps

1. Choose Create New from Select Guideline Name.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Edit the Guideline Name and Description as needed.
4. In Guideline Increase Types, associate the selected guideline with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
5. Ensure Calculate is cleared, to specify the guideline is defined in a lookup matrix.

   The Row and Column Basis, Divide Columns and Position in Range fields are made available for entry. You'll use these fields to define the lookup matrix that will appear in the Guideline Values portlet.
6. Review and select the Row Basis, as needed. Valid values include Performance Rating, Grade, Band and None.

   • If you select None, Grade or Band proceed to step 9.
   • If you select Performance Rating the Guideline Rating Selector and Use Floating Point Rating Performance Ranges fields activate. Proceed to step 7.
7. Select the guideline rating scale to be used in the guideline lookup matrix.

   Valid values include the following:

   • Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds.
   • Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 0.00 to 5.00).
   • PM to Comp SP4 - Indicates the performance rating scale is imported from the customer's Taleo Performance SP4 application.
   • PM to Comp SP3 - Indicates the performance rating scale is imported from the customer's Taleo Performance SP3 application.
   • PM to Comp SP2 - Indicates the performance rating scale is imported from the customer's Taleo Performance SP2 application.

8. In the Use Floating Point Performance Ranges checkbox specify whether or not a floating point performance rating scale is used in the guideline.

    •   Leave it cleared if they are not used.
    •   Select it if they are used.

9. Use Column Basis to specify the column basis to be used in the lookup matrix on the Guideline Values portlet. Valid values range from one to as many as seven columns (i.e. Quintiles plus Outside Min and Max).

10. Use Divide Columns to specify the column division used in the lookup matrix on the Guideline Values portlet. Valid values include Target, Min-Max, Min-Target-Max, and Not Applicable.

11. Use Position in Range to specify whether and how it is used in the guideline. Valid values include Not Applicable, Percent of Range and Compa Ratio. Although Range Penetration appears on selectors it is not yet supported. .

12. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Lookup Guidelines for the selected active basepay plan are displayed, edited as needed, and changes saved to the database.

Next Step

Use the Guideline Values portlet to enter the lookup guideline values in the matrix.

Deleting a Guideline

Prerequisite

You must have selected an active basepay plan to modify.

Configure Plans* > *Base Pay* > *[Guidelines]

Steps

1. Choose an existing guideline from Select Guideline Name.
2. Click Delete.

Result

The selected guideline is removed from the selected active basepay plan.

Guideline Values Portlet

Guidelines are used by managers as a reference point when planning basepay increases for their employees. Once the structure of a basepay guideline is set up, the Guideline Values portlet enables compensation administrators to enter the guideline values for making changes to employees' basepay during planning. The portlet's rollbar layout contains a tab displaying the guideline structure for each basepay increase type. Use the Guideline Values portlet to fill in guideline values; in terms of either calculations to define minimum, target and maximum values; or percentage increase values within a matrix. Guideline Values is the second of two portlets used to define basepay guidelines, the first being the Guidelines portlet. The Guideline Values portlet is dynamically generated based on the basepay guideline structure defined in the Guidelines portlet.

Calculated Guidelines

When the Calculated checkbox is selected in the Guidelines portlet, and the change is saved, the calculated guidelines matrix displays in the Guideline Values portlet. For calculated guidelines, each row in the matrix has a Calculator link. Clicking on the link opens a Calculator. The user enters the calculation for the row basis value into the Calculator and saves. Once a calculation is saved, it is displayed in the cell instead of "Calculator".

The following graphic depicts a calculated guideline setup for a Lump Sum basepay increase where the equations for the guideline are based on the dictionary variable Current_Annual_Salary :

Configuration for Calculated Guidelines

The Guideline Values portlet provides the following entry fields and buttons for calculated guidelines.

Guideline Values Fields and Buttons	
Name	Description
Guideline Tab	In the Guideline Values portlet the individual basepay guidelines display as tabbed pages across a rollbar layout. Click on a tab to display the guideline whose values you want to view, edit or enter.
Label	For a calculated guideline the Label column holds the row basis values Minimum, Target and Maximum.

Guideline Values Fields and Buttons	
Name	**Description**
Calculation	The Calculation column displays the calculations entered for the Minimum, Target and Maximum values.
Action	Click the Calculator button in the Action column to define the calculation for a guideline value. For example, a set of equations for a minimum, target and maximum set of basepay guidelines might be "Current Salary * .015" for a minimum value; "Current Salary * .025" for a target value; and "Current Salary * .035" for a maximum value. For a current salary of $50,000 per year these equations would define calculated guidelines of $750, $1,250 and $1,750 respectively.

Lookup Guidelines

When the Calculated checkbox in the Guidelines portlet is cleared compensation administrators design guideline matrices on row and column bases rather than calculations:

- Row basis values include Performance Rating, Salary Grade and Salary Band.
- Column basis values are for "position in salary range". Valid values include Compa Ratio and Percent of Range. Range Penetration is not supported at this time.
- Columns can also be sectioned (divided) to indicate various combinations of minimum, midpoint, target and maximum values for increases.

In the Guideline Values portlet administrators enter actual guideline values into the matrices:

- Data entry fields at the intersection of rows and columns are used to define the actual guideline values, in percentage, to apply when considering pay increases for employees.
- An administrator can also copy the values from an existing guideline to use as a starting point for entering the values into another guideline.

The following graphic depicts continuing with the merit matrix example introduced in the Basepay Guidelines portlet section of this documentation. Once the compensation administrator uses the editable fields in the Guideline Values portlet to enter the guideline percent values, the merit matrix displays as follows:

Configuration for Lookup Guidelines

The Guideline Values portlet provides the following entry fields and buttons.

Guideline Values Fields and Buttons	
Name	Description
Guideline tab	Each guideline appears in the Guideline Values portlet as a tabbed page on a rollbar layout. Click on a tab to view, edit or enter the guideline values into the lookup matrix for that guideline.
Budget Basis Selector	Use the budget basis selector to choose the basis value for which to display guidelines in the matrix. This changes based on client requirements. In the above example it is Country, and the selector allows the administrator to define guideline values for each country where there are employees. The budget basis could be any of a number of organizational segments; such as Business Unit, Company or Division. Once you have selected a basis (e.g. a country such as USA) you can edit or enter unique guideline values for it.
Copy From Selector	Use this selector to choose a guideline you want to copy from one budget basis value (organizational segment) to a guideline for another. This can reduce configuration time and effort.
Preview	Use to preview, in a separate window, the results of a copy action on the values of a selected guideline to the guideline currently displayed. When you close the popup window the results of the copy action are not saved to the database.
Copy	Use to copy the values of a selected guideline to the guideline currently displayed and have changes saved to the database.
Data Entry Fields for Guideline Values	Use to enter guideline values as percentages, with up to 2 decimal places. These determine what are acceptable ranges for basepay increases granted to employees during planning.
Clear	Use to clear the current entries in the fields in the matrix so you can enter a new set of values. Does not change the data in the database.
Cancel	Use to revert any unsaved entries back to the previous saved values. Does not change the data in the database.
Save	Use to save any current entries or changes to the database.

Entering Calculated Guideline Values

Prerequisite

- You must first have selected an active basepay plan to modify.
- The calculated basepay guideline you want to enter values for must already be defined in the Guidelines portlet.

Configure Plans > *Basepay* > *[Guideline Values]*

Steps

1. Click the tab for the calculated guideline you want to edit or enter values for.

The matrix for the selected calculated guideline displays three rows for the minimum, target and maximum guideline values. If a calculation is already entered for a guideline value, it displays in the Calculation column.

2. In the Action column click the Calculator button to open the Calculator tool. Use the tool to edit or enter the calculation for the guideline value. For example, a minimum value might be entered using an equation such as "Current_Annual_Salary * .025".
The guideline calculation displays in the Calculation column.

3. Repeat step 2 as needed for each guideline value until you are done.

4. Click Save to write the changes to the displayed guideline to the database.

Result

Once the budget processing is run, users will have guidelines to follow when making base pay increases for employees during planning.

Entering Lookup Guideline Values

Prerequisite

- You must first have selected an active basepay plan to modify.
- The basepay lookup guideline you want to enter values for must already be defined in the Guidelines portlet.

Configure Plans** > **Basepay** > **[Guideline Values]

Steps

1. Click the tab for the guideline you want to enter values for.
The matrix for the selected guideline displays.

2. Optional. You can choose to populate the matrix with guideline values from a previously defined budget basis (e.g. Country), if any . To do this use Set Budget Value at the upper left of the page to select the row basis for this guideline (e.g. USA).
The matrix displays the row basis structure (e.g. the countries the company has employees in).

3. Optional. Then use Select Guideline Value at the upper right side of the page to select the budget basis to populate the guideline values from (e.g. France). Click Preview to view the results and/or Copy to write them to the matrix.
The guideline matrix for the current budget basis (USA) is now populated with values from a previously saved set of entries for another budget basis (France), and are editable. At this point you can either accept the results as they are or edit them.

4. Review, edit or enter as needed the guideline values for each cell.

- Type your edits directly into the cells as percentage values.
- Optional. Click Clear to remove the unsaved values from the displayed matrix.

5. Click Save to write the changes to the displayed guideline to the database.

6. Repeat this process for each lookup guideline you need to edit.

Result

Once the budget processing is run, users will have guidelines to follow when making base pay increases for employees during planning.

Download/Upload Guidelines

The Download and Upload Guidelines functionality provides Compensation administrators additional flexibility in managing guidelines for their compensation plans. Administrators can use the Download Guidelines section to download a text file version of a plan guideline. This is useful to document the current configuration (data entry) of guideline values, and to serve as a backup. Administrators can also use the Upload Guidelines section to upload a text file version of a guideline. Once uploaded it can be added to an active plan and further edits/changes can be made directly within the Guidelines and Guideline Values portlets. This allows administrators to make changes to a guideline without having to modify the code for an entire compensation plan manually. Note: An entire plan can be downloaded to an XML file using the Plans page, and will include the code for any guidelines in the plan.

Configuration

The Download Guidelines section provides the following fields and buttons.

Download Guidelines Fields and Buttons.	
Name	Description
File Name	The file name xxxxxGuidelines.txt (where xxxxx is basepay, bonus or stock) populates this field by default. The system uses this as the name for the text file downloaded to your local machine. You can change this name if desired.
Download	Use to initiate the text file download process to your local machine. The file you selected from Plan Name at the top of the page is downloaded with the file name you specified in this section.

Configuration

The Upload Guidelines section provides the following fields and buttons.

Upload Guidelines Fields and Buttons.	
Name	Description
Browse	Use to navigate to and select a guideline text file for uploading to the Compensation database.
File Name	Displays the name of the file you selected for upload. You can rename it prior to upload if desired.
Upload	Use to initiate the text file upload from your local machine to the database.

Downloading Guidelines

Prerequisite

Use to download guideline values from an existing active compensation plan (basepay, bonus or stock) to a local machine as a TXT file.

Configure Plans* > *Basepay or Bonus or Stock* > *[Download Guidelines]

Steps

1. Use the Plan Name selector at the top of the page to choose an active plan.
2. In File Name you can either accept the default download file name or rename it as desired.
3. Click download to initiate the download process to your local machine.

Result

The selected plan guideline is downloaded to your local machine, in text file format, to document the current configuration values and provide a backup.

Uploading Guidelines

Prerequisite

Use to upload guidelines and guideline values for a compensation plan (basepay, bonus or stock), in a TXT file, from a local machine to the database.

Configure Plans* > *Basepay or Bonus or Stock* > *[Upload Guidelines]

Steps

1. Click Browse to navigate to and select a guideline text file for upload to the database.
2. Click Upload.

Result

The selected guideline and its values are uploaded to the database and can be edited in the Guidelines and Guideline Values portlets as needed.

Create or Modify Budgets

The Create/Modify Budgets portlet allows the compensation administrator to run budget processing on and deploy a selected active compensation plan, from directly within the application. Administrators have the option of running the budget processing without affecting existing planning, or choosing to clear the employee records of existing planning information. They can also run a report producing a text file with data pertaining to the new budget. Running the budget process populates employee planning records with data based on the selected compensation plan's elements; such as budgets, guidelines and eligibility.

Configuration

The Create/Modify Budgets section provides the following fields and buttons.

Create/Modify Budgets Fields and Buttons	
Name	Description
Clear Employee Records	Use to specify whether budget processing will affect existing employee planning records (i.e. percentages or amounts entered by managers for employee increases and awards). When the checkbox is cleared budget processing does the following: • Recalculates budgets. • Updates guidelines. • Updates eligibility. • Does not affect previously saved data entry by managers in employee planning records. When the checkbox is selected budget processing also does the following: • Clears previously saved data entry by managers in employee planning records, so planning by managers will have to be redone.
Create/Modify Budgets	Use to initiate a budget processing run on the selected compensation plan, subject to the value selected in Clear Employee Records. Budget processing is done in blocks of 100 employees at a time.
Get Report	Use to run a report producing a text file with data pertaining to the new budget.
Cancel Budget Creation	Use to stop the budget processing at the boundary of the next 100 employees being processed. The response is not instantaneous, it could take a few minutes. This only stops the budget process, it does not delete any existing budget records.

Running Budget Processing

Prerequisite

• You have made changes to an existing, active compensation plan and need to update the budgeting, guideline and eligibility records in planning.

- You must have selected the plan from Plan Name at the top of the page.

Configure Plans > *Basepay or Bonus or Stock* > *[Create/Modify Budgets]*

Steps

1. Specify whether or not you want to remove existing employee planning information for the plan as part of the budget processing.

   - Select Clear Employee Records only if it is desired to remove existing employee planning data.
   - Clear the checkbox if it is desired to retain existing employee planning data.

2. Click Create/Modify Budgets.

3. Click Get Report for a text file with data pertaining to the new budget.

Result

Budgets, guidelines and eligibility in employee planning records are updated with the modifications made to the plan.

Next Step

- You can use the Test Employee section of the Basepay, Bonus or Stock page to verify employee data generated by the plan is appropriate to how you want the plan to work.
- The next time you open the Plans page the system will reverse engineer the modified plan XML and save it to the database.
- You can download a copy of the plan XML from that page to document the current configuration and provide a backup.

Test Employee Basepay

When a compensation administrator has selected an active basepay plan, made changes to it and run budget processing, the Test Employee section of the Basepay page provides them a tool for testing plan values and verifying employee records are created appropriate to the plan. The administrator tests the data by first selecting the Plan Name, then entering an ERP Employee ID for a familiar (test) employee, and then clicking the buttons in the Test Employee section to view the results. Being able to do this data checking from directly within the application saves them considerable time and effort.

Configuration

The Test Employee Section provides the following fields and buttons, listed in the top to bottom order they appear in the Test Employee section of the Basepay page:

Test Employee Fields and Buttons	
Name	Description
Enter ERP Employee ID	Use to enter the identification number of the test employee.
Lookup Employee	Use to initiate a lookup of basic employee information related to the selected compensation plan. Results display in the text area to the right.
Performance Rating	View only field used as a label, no data entry.
Find Ratings	Use to initiate a lookup of the performance rating information for the test employee. Results display in the text area to the right.
Enter Budget	Use to choose a budget for the selected plan.
Lookup Values	Use to initiate a lookup of the budget information for the test employee under the selected budget. Results display in the text area to the right.
Enter Guideline DD	Use to choose a guideline for the selected plan.
Lookup Value	Use to initiate a lookup of the guideline information for the test employee under the selected guideline. Results display in the text area to the right.
Test Eligibility (field)	Use to enter and test an eligibility rule for the selected plan and increase type. You can use this feature before making changes in the Eligibility Calculator, or after you have finished editing a plan. You can even copy and paste the equation from the Eligibility Calculator. The important point is to use this feature to see if the results for the test employee are as desired._x000D_ The eligibility rule that is defaulting into the entry field (i.e. (Employee_Manager_Name.equals("Decker, Michael")) is hard coded in the HTML setup and provided as an example. You can write over it with the actual rule (such as Employee_Status.equals("Active")) you want to use for the test.
Test Eligibility (button)	Use to initiate a test of the eligibility rule for the test employee under the selected plan and increase type. Results display in the text area to the right.

Test Employee Fields and Buttons	
Name	Description
Test Equation (field)	Use to enter and test a calculation for the selected plan and increase type. You can use this feature before making changes in the Calculator, or after you have finished editing a plan. You can even copy and paste the equation from the Calculator. The important point is to use this feature to see if the results for the test employee are as desired.

The calculation that is defaulting into the entry field (i.e. Current_Annual_Salary * 0.1) is hard coded in the HTML setup and provided as an example. You can write over it with the actual calculation you want to use for the test. |
| Eval Equation (button) | Use to initiate a test of the calculation on the test employee under the selected plan and increase type. Results display in the text area to the right. |

Testing Employee Data Basepay Plan

Prerequisite

You have selected an existing active basepay plan, made modifications to it, ran budget processing, and now want to test employee records to see if they are appropriate to how you want the plan to work..

Configure Plans > Basepay > [Test Employee]

Steps

1. Enter the test employee's ERP ID and click Lookup Employee.

    Basic information about the employee under the selected compensation plan displays to the right.
2. Enter selection values and click the associated lookup buttons for each of the remaining fields in the section: Performance Rating, Enter Budget, Enter Guideline DD, Test Eligibility and Test Equation.

    Results in the form of plan related data for the test employee under the selected plan display to the right of each field.
3. Review the displayed results and evaluate if the data is appropriate to how you want the plan to work.
4. If there are problems with the employee plan data go back to the other sections of this Basepay page to make the necessary corrections to the plan and rerun budget processing. Then test the plan again. Repeat this process until the employee records appear to be appropriate to how you want the plan to work.

Result

The selected compensation plan is modified, budget processing is run, and plan results are verified for a test employee's records.

Next Step

- The next time you open the Plans page the system will reverse engineer the modified plan XML and save it to the database.

- You can download a copy of the plan XML from that page to document the current configuration and provide a backup.

Configure Bonus Plan

Configure Bonus Plan

The functionality on the Bonus page provides Compensation Administrators a tool to select an active bonus plan and modify its components. They can create factor groups and factors; and targets. They can also define target values, budgets, guidelines and guideline values; and eligibility and proration rules for the selected plan. This allows administrators to perform these functions from directly within the application and reduces the risk of introducing errors in the plan code. Modifications made to a plan on the Bonus page write back to the database and the modified plan XML can be downloaded from the Plans page.

Compensation administrators benefit from using the Bonus page in association with the Plans page; providing them a toolkit for administering and configuring bonus plans through the user interface:

1. Use the Plans page to upload (if needed) and activate a bonus plan.
2. Use the Bonus page to modify/edit the plan.
3. Use the Bonus page to run the budget for the plan to populate employee records.
4. Use the Bonus page's Test Employee function to check whether the plan modifications create valid employee data.
5. Use the Plans page to download a copy of the plan XML to document the current configuration and provide a backup.

Bonus plans are made up of factors, targets, budgets and guidelines. There can be one or more bonus plan per customer implementation. A bonus plan has one set of guidelines with one budget associated. Factors are used to calculate the employee bonus payout. Targets are used to set up budget amounts.

Portlets on the Bonus page are collapsible and remain empty until a plan name or component is selected from a drop-down. The Bonus page contains the following portlets and sections:

*   **Plan Details -** Use the Plan Name selector to choose a plan for modification from a list of the active bonus plans in the database. Once an active plan is selected, Plan Details provides entry fields for the plan name and description.
*   **Factor Groups -** Use to select, create or delete factor groups; define the factor group eligibility rule; and select, add or delete factors in a group. Factor groups consist of one or more factors for the bonus plan that apply to a particular group. Groups can be departments, business units, grades, etc. An example is "Senior VP Factor Group". Factors are used to calculate the employee bonus payout for members of the group. For example, a factor group calculation for an employees bonus award might multiply a Corporate factor X a Business Unit factor X an Individual factor. For each factor there can also be a factor weight, factor value or multiplier value.
*   **Targets -** Use to select, create or delete targets; enter an eligibility equation for the target; and define the target and target value bases. A target is an expected allocation for a bonus, often expressed as a percent of the employee's base salary paid out when the employee meets goals or other performance criteria. As such, targets are used to calculate budgeted amounts.
*   **Target Values -** Use to edit, add or delete percentage values for each target value basis in a target.
*   **Budgets -** Use to display or enter the name, description and basis of a budget. It also provides the ability to edit the budget calculations and proration rules. The standard calculation for a budget typically multiplies employee wages X a target.
*   **Guidelines -** Use to display or enter the guideline name and description. Define whether the guideline is either calculated; or looked up using a matrix having a row and column value basis (e.g. performance rating against min-target-max). Guidelines are used by managers as a reference point when planning bonus awards for their employees.
*   **Guideline Values -** Use to display or enter each increase guideline value for each selected basis value.
*   **Create/Modify Bonus Budgets -** Use to run budget processing on and deploy the selected active bonus plan.

- **Upload Guidelines -** Use to upload bonus guidelines in a TXT file for use in modifying a plan.
- **Download Guidelines -** Use to download bonus guidelines in a TXT file to document the current configuration of the guideline values and provide a backup.
- **Test Employee -** Use to test a selected bonus plan and verify valid employee records are created.

Note: The Test Employee section is intended to be available to users with the Compensation Administrator role. If it is not visible contact your Taleo Services or Support representative.

The layouts and information provided in this section are examples of common configuration. Actual configuration and information can vary based on your organization's bonus plan.

Plan Selection and Details

During preparation for a new compensation cycle it may become necessary to modify an active bonus plan for the new cycle. The Plan Name selector at the top of the Bonus page provides administrators a list of the active bonus plans in the database from which to select the plan for modification. The Plan Details and other portlets on the page are collapsible and remain empty until a plan name is selected from the drop-down. Once an active plan is chosen the system displays information specific to that plan in the Plan Details portlet, and in the selectors for the other portlets.

To specify the plan you want to modify choose it in Plan Name and click Select. The system expands the Plan Details portlet and provides entry fields for the plan name, description and bonus wages.

Configuration

The following fields and buttons are provided in the Plan Details portlet.

Plan Details Fields and Buttons	
Name	**Description**
Plan Name	Displays the plan name for the selected active plan. Use to modify as needed.
Description	Displays the description for the selected active plan. Use to modify as needed.
Bonus Wages	Displays the name of the data dictionary variable that points to the employee's wages used to calculate eligibility for the bonus. Use to modify as needed.
Eligibility Calculator	Use to display a popup window with the Eligibility Calculator and define an eligibility rule for the bonus plan using an equation. For example, the equation "UDF_Bonus_1_Elig_Earnings_1 > 0 && UDF_Bonus_1_Elig_Earnings_1 < 90000" means employees with earnings from 0 to 90,000, as defined by the data dictionary variable UDF_Bonus_1_Elig_Earnings, are eligible for the bonus plan. The bonus wages must be already loaded into the database before the plan budget processing is run.
Cancel	Use to revert any unsaved entries and changes to the previous saved values.
Save	Use to save the current entries and changes to the database.

Factor Groups Portlet

In a bonus plan factors are commonly used to calculate the value of bonus awards granted to employees during planning. Factors are also used in association with targets in calculations for bonus budgets. Use the Factor Groups portlet to select, create or delete factor groups; define the factor group eligibility rule; and select, add or delete factors in a group.

Factor groups consist of one or more factors for the bonus plan that apply to a particular group of employees:

- A group can be a department, business unit, salary grade, etc. An example is "Senior Vice President Factor Group".
- Factors are used to calculate the individual bonus payout for members of the group. For example, a factor group calculation for an employee's bonus award might include three factors; multiplying a Corporate factor X a Business Unit factor X an Individual factor. A Corporate factor could be revenue, profit or scorecard oriented. An Employee factor could be individual employee goals oriented.

For each factor there can also be a factor weight, factor value and multiplier value.

Factors are multiplied by the other factors in the group to total up the bonus percentage for an employee. This percentage is multiplied by a budgeted target to determine the bonus percent.

Configuration

The Factor Groups portlet provides the following fields and buttons..

Factor Groups Fields and Buttons	
Name	Description
Select Factor Group	Use the dropdown list to choose an existing factor group in the plan that you want to review or modify. You can also add a factor group to the selected plan by choosing Create New from the dropdown list.
Select (Factor Group level)	Use to select the chosen factor group and populate the other fields in the portlet with factor group details, or to make the fields in the portlet editable for creating a new factor group. When you select a factor group a grid opens below displaying a row for each factor in the group.
Delete (Factor Group level)	Use to remove the chosen factor group from the plan.
Factor Group Name	Use to display or enter a unique, client specific name for the factor group. This can differ from the label in the Select Factor Group dropdown.
Description	Use to display or enter a client specific description of the factor group.
Eligibility Calculator	Use to enter an expression for an eligibility rule that affects the chosen factor group. For example, the rule "Employee_Location.equals("Paris.France")" means that employees in the Paris, France office are eligible to be in the factor group.

Factor Groups Fields and Buttons	
Name	**Description**
Factors Grid	Displays rows listing the factors in the chosen group, with columns for each factor's name, weight, value and multiplier.
Factor Name	Displays the name of a factor as defined in the plan.
Factor Weight	If multiple factors are used for calculating an employee's bonus they must be weighted. Use this field to enter a factor weight in percent, from 0 to 100. The factor weights for a group of factors must add up to 100%. You can also choose to define the factor weight with an equation by using the Factor Weight Calculator.
Factor weight Equation	Use to open the Factor Weight Calculator to set up an equation. If using an equation it zeroes out the values in the Factor Weight column so you can't enter percentages, and any previously entered percentages you entered are overwritten.
Factor Value	Use to enter a factor value. Factor values determine how well you, or your business unit, or your Corporation did in meeting a factor. They are expressed in percent, from 0 to 100. You can also choose to define the factor value with an equation by using the Factor Value Calculator.
Factor Value Equation	Use to open the Factor Value Calculator to set up an equation. If using an equation it zeroes out the values in the Factor Value column so you can't enter percentages, and any previously entered percentages you entered are overwritten.
Multiplier Value	Use to enter a multiplier value for the factor. Factor multipliers adjust the factor based on some criteria other than the weighting or the factor value. For example, if the multiplier is "1" it changes nothing. If it is 0.6 it would scale the bonuses down. If it is 1.4 it would increase the bonuses by that multiple.
c (selection checkbox)	Use to select a factor from the list.
Delete (Factor level)	Use to remove a selected factor from the list and the factor group.
Add Factor	Use to add a new factor to the list and the factor group.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Modifying a Bonus Factor Group

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans > *Bonus* > *[Factor Groups]*

Steps

1. Choose an existing factor group from Select Factor Group.
2. Click Select.
   Factor Group details populate the fields in the portlet. A grid displays a list of the factors in the group.
3. Edit the Factor Group Name, Description and Bonus Wages as needed.
4. Click Eligibility Calculator to view and edit as needed the existing calculation for the eligibility rule associated with the factor group.
5. Edit the factors in the grid as needed.
   - To delete a factor select the checkbox on the row for that factor and click Delete below the grid.
   - To add a factor click Add Factor; enter the factor weight, value and multiplier as needed; and click Save.
   - To modify a factor edit the factor weight, value and multiplier as needed; and click Save.
6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The chosen factor group for the selected active bonus plan is displayed, edited as needed, and changes saved to the database.

Creating a New Bonus Factor Group

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans* > *Bonus* > *[Factor Groups]

Steps

1. Choose the Create New option from Select Factor Group.
2. Click Select.
   The entry fields in the portlet are editable. A grid displays for you to enter the factors in the group.
3. Enter the Factor Group Name, Description and Bonus Wages as needed.
4. Click Eligibility Calculator to enter a calculation for the eligibility rule associated with the factor group.
5. Click Add Factor to insert a row in the grid and enter a new factor. Repeat as many times as needed to enter all factors in the new group.
   - To delete a factor select the checkbox on the row for that factor and click Delete below the grid.
   - For each new factor enter the factor weight, value and multiplier as needed; and click Save.
6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The new factor group for the selected active bonus plan is created and changes saved to the database.

Deleting a Bonus Factor Group

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans > *Bonus* > *[Factor Groups]*

Steps

1. Choose an existing factor group from Select Factor Group.
2. Click Delete.

Result

The selected factor group is removed from the selected active bonus plan.

Targets Portlet

In a bonus plan targets are used to calculate budgeted amounts. A bonus target is an expected allocation for a bonus, often expressed as a percent of the employee's base salary paid out when the employee meets all goals or other performance criteria. Targets are grouped together into a target group to define the calculations for a group of employees. Use the Targets portlet to select, create or delete a target group; define the target group name and description; enter an eligibility equation for the target group; and define the target basis and value basis for the group. It is the first of two portlets used to configure target groups and their targets, the second being the Target Values portlet.

A bonus target is a planned incentive amount that is paid when the company and/or department and/or employee meets their performance goals. As such, a target consists of three main elements:

- Target Basis - Examples include grade, job level and job code.
- Value Basis - Examples include country, business unit, etc.
- Target Value - A percent or amount for the bonus award target.

A target basis such as grade might include as target basis values all the salary grades in the company (e.g. 10, 11, 12, etc.) A value basis such as country might included all the countries within the company (e.g. India, France, USA). Each combination of Target Basis Value and Value Basis Value has to be assigned a Target Value. For example, "a Salary Grade 7 with Excellent performance rating might be assigned a target value of 200% of the target bonus". In this example the target basis is Salary Grade; the value basis is Performance Rating; and the combination of "7" and "Excellent Rating" gets a target value of "200%" of bonus. The target values are entered in the Target Values Portlet.

Configuration

The Targets portlet provides the following fields and buttons.

Targets Fields and Buttons	
Name	Description
Select Target Group	Use the dropdown list to choose an existing target group in the plan that you want to review or modify. You can also add a target group to the selected plan by choosing Create New from the dropdown list.
Select	Use to select the chosen target group and populate the other fields in the portlet with target group details, or to make the fields in the portlet editable for creating a new target group.
Delete	Use to remove the chosen target group from the plan.
Target Group Name	Use to display or enter a unique, client specific name for the target group. This can differ from the label in the Select Target Group dropdown.
Description	Use to display or enter a client specific description of the target group.
Eligibility Calculator	Use to enter an expression for an eligibility rule that affects the chosen target group.
Target HRIS	Use the HRIS checkbox to indicate whether or not the employee bonus target values are included in the employee file from the client's HR system.

Targets Fields and Buttons	
Name	**Description**
	When selected the target group/targets are assigned by data imported from the customer's HRIS system. The customer provides a file with the values to upload to the employee data table. The HRIS Dictionary Var field is activated to enter the variable that points to the data. When accessing the Target Values portlet a message displays indicating "Bonus targets are imported from HRIS".
	When left cleared the target group is created by the user in this portlet. The Target Basis Dictionary Var, Value Basis Dictionary Var and Target Value fields are activated. When accessing the Target Values portlet a grid displays the targets in the group with their Target Basis Name, Target Value Name and Target value.
HRIS Dictionary Variable	Use to enter the data dictionary variable name that points to the customer's imported HRIS data. This field only displays when Target HRIS is selected.
Target Basis Dictionary Variable	Use to enter the data dictionary variable name that points to the target basis to be used. This field only displays when the Target HRIS field is cleared. Examples of common target bases are Grade, Job Level and Job Code. If the target basis is grade, for example, then the target basis values would be the grade values such as grades 10, 11, 12, etc. This field only displays when the Target HRIS field is cleared.
	This field works in combination with the Value Basis Dictionary Variable. For example, if the target basis is "Grade" and the value basis is "Country", this would create a target group for each set of grades for each country.
Value Basis Dictionary Variable	Use to enter data dictionary variable that points to the value basis to be used. For example, a valid value might be Country. If the value basis is country, then the value basis values would be the country values such as India, France, Germany, etc. This field only displays when the Target HRIS field is cleared.
	This field works in combination with the Target Basis Dictionary Variable. For example, if the target basis is "Grade" and the value basis is "Country", this would create a target group for each set of grades for each country.
Target Value Amount	Use to indicate whether or not the target value is expressed in percent or currency. The default value is for the checkbox to be cleared and the value to be expressed in percent. When the checkbox is selected the value is expressed in amount (currency).
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Modifying a Bonus Target Group

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans* > *Bonus* > *[Targets]

Steps

1. Choose an existing target group from Select Target Group.
2. Click Select.
   Target group details populate the fields in the portlet.
3. Edit the Target Group Name and Description as needed.
4. Click Eligibility Calculator to view and edit as needed the existing calculation for the eligibility rule associated with the target group.
5. Use the Target HRIS checkbox to indicate whether the target data is imported from the customer's HRIS or is entered using this portlet.

   - When selected the target group/targets are assigned by data imported from the customer's HRIS system. The customer provides a file with the values to upload to the employee data table. The HRIS Dictionary Var field is activated to enter the variable that points to the data. When accessing the Target Values portlet a message displays indicating "Bonus targets are imported from HRIS".
   - When left cleared the target group is created by the user in this portlet. The Target Basis Dictionary Var, Value Basis Dictionary Var and Target Value fields are activated. When accessing the Target Values portlet a grid displays the targets in the group with their Target Basis Name, Target Value Name and Target value.

6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Target groups for the selected active bonus plan are displayed, edited as needed, and changes saved to the database.

Creating a New Target Group

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans* > *Bonus* > *[Targets]

Steps

1. Choose Create New from Select Target Group.
2. Click Select.
   The entry fields in the portlet are editable.
3. Enter the target group Name and Description.
4. Click Eligibility Calculator to enter a calculation for the eligibility rule associated with the target group.

5. Use the Target HRIS checkbox to indicate whether the target data is imported from the customer's HRIS or is entered using this portlet.

   • When selected the target group/targets are assigned by data imported from the customer's HRIS system. The customer provides a file with the values to upload to the employee data table. The HRIS Dictionary Var field is activated to enter the variable that points to the data. When accessing the Target Values portlet a message displays indicating "Bonus targets are imported from HRIS".

   • When left cleared the target group is created by the user in this portlet. The Target Basis Dictionary Var, Value Basis Dictionary Var and Target Value fields are activated. When accessing the Target Values portlet a grid displays the targets in the group with their Target Basis Name, Target Value Name and Target value.

6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

A new target group for the selected active bonus plan is created and changes saved to the database.

Deleting a Bonus Target Group

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans* > *Bonus* > *[Targets]

Steps

1. Choose an existing target group from Select Target Group.
2. Click Delete.

Result

The selected target group is removed from the selected active bonus plan.

Target Values Portlet

In a bonus plan targets are used to calculate budgeted amounts. Use the Target Values portlet to select a target group; list the targets in the group; and define the target basis values, value basis values, and target values for the targets. It is the second of two portlets used to configure target groups and their targets, the first being the Targets portlet.

A bonus target is a planned incentive amount that is paid when the company and/or department and/or employee meets their performance goals. As such, a target consists of three main elements:

- Target Basis - Examples include grade, job level and job code. A target basis such as grade might include as target basis values all the salary grades in the company (e.g. 10, 11, 12, etc.).
- Value Basis - Examples include country, business unit, etc. A value basis such as country might include as value basis values all the countries within the company (e.g. India, France, USA).
- Target Value - A percent or amount for the bonus award target. Each combination of Target Basis Value and Value Basis Value has to be assigned a Target Value.

For example, "a Salary Grade 7, with Excellent performance rating, might be assigned a target value of 200% of the target bonus". In this example the target basis is Salary Grade; the value basis is Performance Rating; and the combination of "7" and "Excellent Rating" gets a target value of "200%" of bonus.

Configuration

The Target Values portlet provides the following fields and buttons.

Target Values Fields and Buttons	
Name	Description
Select Target Group	Use the dropdown list to choose an existing target group, in the chosen bonus plan, for which you want to review or modify the targets.
Select (Target Group level)	Use to select the chosen target group and populate the other fields in the portlet with target group details.
Description (Target Group level)	Use to display, and edit if needed, the description of the target group.
Target Values Grid	When the target group is selected the target basis values, value basis values and target values populate in a grid below. You can review, edit, delete and create targets in the grid.
Add Target	Use to add a new target to the target group. A target is a valid combination of target basis value and value basis value, for which a target value must be entered.
Target Basis Name and Value Basis Name	Use to display or enter a list of the possible combinations of target basis values with value basis values, for the chosen target group. A target basis such as grade might include as target basis values all the salary grades in the company (e.g. 10, 11, 12, etc.) A value basis such as country might include as value basis values all the countries within the company (e.g. India, France, USA).

Target Values Fields and Buttons	
Name	Description
Target Value	Use to display or enter a target value for each combination of target basis values with value basis values, for the chosen target group. A target value is an expected allocation for a bonus, often expressed as a percent of the employee's base salary paid out when the employee meets all goals or other performance criteria. It can also be expressed as a currency amount if the Targets portlet is configured for that scenario.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Modifying a Bonus Target Value

Prerequisite

- You must have selected an active bonus plan to modify.
- You must have defined the bonus target group in the Target Groups portlet.

Configure Plans > *Bonus* > *[Target Values]*

Steps

1. Choose an existing target group from Select Target Group.
2. Click Select.
   The target group description displays and a target values matrix populates in the portlet. The matrix displays columns and rows for each target basis/target value basis combination.
3. For each target basis/target value basis combination, edit or enter a target value.
4. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Target values for the selected bonus plan and bonus target group are displayed, edited as needed, and changes saved to the database.

Creating a New Bonus Target Value

Prerequisite

- You must have selected an active bonus plan to modify.
- You must have defined the bonus target group in the Targets portlet.

Configure Plans > *Bonus* > *[Target Values]*

Steps

1. Choose a target group from Select Target Group.
2. Click Select.
   The Description and Target Values matrix display information for the target group.

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3. Click Add Target to insert a new blank row into the matrix.

4. Enter the new target basis value, value basis value and target value in the new fields.

5. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

A new target value for the selected target group is created and changes saved to the database.

Deleting a Bonus Target Value

Prerequisite

- You must have selected an active bonus plan to modify.
- You must have defined the target group in the Targets portlet.

Configure Plans* > *Bonus* > *[Target Values]

Steps

1. Choose an existing target group from Select Target Group.
   The Description and Target Values matrix display information for the target group.

2. Click the checkbox to the left of the target value row you want to delete.

3. Click Delete.

4. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The selected Target Value is removed from the selected target group.

Budgets Portlet

A bonus plan has one budget associated with it. Use the Budgets portlet to edit or enter the name, description and budget basis, as well as the budget calculation and proration rules. The standard calculation for a budget typically multiplies employee wages X a target.

Configuration

The Budgets portlet provides the following fields and buttons.

Budgets Fields and Buttons	
Name	**Description**
Budget Name	Use to edit or enter the budget name associated with the chosen bonus plan.
Description	Use to edit or enter a client specific description of the budget for the chosen bonus plan.
Basis	Use to edit or enter the budget basis, if any, by entering the name of the data dictionary variable to be used as the basis (e.g. Country, Business Unit, Salary Grade, etc.). For example, if Country is the basis, then in the planning pages a separate budget is displayed for each country. As of Compensation FP 12B, bonus budget basis must always be a data dictionary (DD) variable. If it is loaded from an old plan, the budget basis name is treated as a DD variable, and the system checks to see if the variable is in the DD.
Enforce Budget Basis	Use to indicate whether to enforce the budget value basis. In most situations this checkbox will be cleared to set it to false, or off. In that case only one budget is displayed in the planning pages. Select the checkbox to set this value to true, or on, when enforcing the budget basis as a way to cause the appearance of a number of budgets seen in the Budget Pocket. (For example, if you are using a Budget Basis Value of Country, then select this checkbox and the system will display a separate budget for each country.)
Bonus Calculator	Use to enter an equation for a bonus budget calculation that affects the budget displaying in this portlet. The bonus budget calculator can be used to define the budget is equal to a target, or to an equation (e.g. current employee salaries X a target).
Proration Calculator	Use to enter a proration rule that affects the budget displayed in this portlet.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Entering and Modifying a Bonus Budget

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans** > **Bonus** > **[Budgets]

Steps

1. Edit or enter the bonus budget Name and Description as needed.

2. Edit or enter the data dictionary variable for the bonus budget Basis, if used.

   The budget basis provides a way to display the bonus budget for a company as a number of separate sub-budgets. For example, if the basis is Country, a separate budget displays in the planning pages' budget pocket for each country.

3. Use Enforce Budget Basis to specify whether or not a budget basis is to be used.

   • Clear the checkbox if no budget basis is used to divide up the main budget.
   • Select the checkbox if a budget basis is used to divide up the main budget into sub-budgets.

4. Click Bonus Calculator to edit or enter the calculation for determining the budget.

   For example, the budget could be equal to a target, or an equation such as "employee salaries X a target".

5. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The budget for the selected active bonus plan is edited or entered as needed, and changes saved to the database.

Guidelines Portlet

Guidelines are used by managers as a reference point when planning bonus awards for their employees. Use the Guidelines portlet to edit or enter the guideline name and description; and guideline details. Guidelines is the first in a sequence of two portlets used to define bonus guidelines, the second being the Guideline Values portlet.

A bonus plan has one set of guidelines associated with it. A guideline can either be calculated or looked up in a matrix:

- A calculated guideline provides guidance for the level of bonus award to be granted an employee based on an equation.
- A guideline lookup matrix provides guidance based on a row basis (such as performance rating) and a column division (such as Mini-Max).

Guidelines are applied to employees when budgets are run.

Configuration

The Guidelines portlet provides the following fields and buttons.

Guidelines Fields and Buttons	
Name	**Description**
Guideline Name	Use to edit or enter the guideline name for the chosen bonus plan.
Description	Use to edit or enter a customer specific description of the guideline.
Calculate	Use this checkbox to specify whether or not the guideline is calculated: • When it is cleared the guideline is not calculated using equations. Instead, the system displays the Row Basis and Divide Columns fields in the Guidelines portlet. Use these fields to define a row and column value basis for the guideline which displays in a matrix in the Guideline Values portlet. • When it is selected the guideline is calculated. The row and column basis entry fields in the Guidelines portlet are made unavailable for entry. A default matrix for entering the guideline equations for the minimum, target and maximum values is displayed in the Guideline Values portlet.
Row Basis	Use to select the guideline row basis for the guideline matrix that displays in the Guideline Values portlet. For example, when a row basis of Performance Rating is selected the row basis values that display in the Guideline Values portlet are the ratings that make up the rating scale (such as Below, Meets, Exceeds and Frequently Exceeds). When the row basis is Performance Rating, the system activates the Guideline Rating Selector and Use Floating Point Performance Ranges fields. Other valid values for the Row Basis selector are Band, Grade and Not Applicable.
Guideline Rating Selector	This field activates when Calculate button is not selected and the Row Basis is Performance Rating. Use to select the type of rating scale for the guideline lookup matrix. Valid values include the following:

Guidelines Fields and Buttons	
Name	Description
	• Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds. • PM to Comp - Indicates the performance rating scale is imported from the customer's Taleo Performance application. • Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 0.00 - 5.00).
Use Floating Point Performance Ranges	Use to specify whether a floating point performance rating scale is used in the guideline. Supports a numeric rating scale with decimal values (e.g. from 1.00 - 5.00).
Divide Columns	Use to specify the guideline column basis for the guideline matrix that displays in the Guideline Values portlet. Valid values are Not Applicable, Target, Min-Max, and Min-Target-Max.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Entering and Modifying a Calculated Bonus Guideline

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans > ***Bonus*** > ***[Guidelines]***

Steps

1. Edit or enter the bonus guideline Name and Description as needed.
2. Select Calculate to specify the guideline is calculated using equations.

   The row and column basis entry fields in the Guidelines portlet are made unavailable for entry, and a default matrix for entering the guideline equations for the minimum, target and maximum values is displayed in the Guideline Values portlet.
3. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

• The guideline name, description and type (calculated or lookup) information are entered and changes saved to the database.
• The calculated guideline matrix is displayed in the Guideline Values portlet, configured for entry of the equations for the minimum, target and maximum values.

Next Step

• Use the Guideline Values portlet to edit or enter the equations defining the minimum, target and maximum guideline values.

Entering and Modifying a Bonus Guideline Lookup

Prerequisite

You must have selected an active bonus plan to modify.

Configure Plans* > *Bonus* > *[Guidelines]

Steps

1. Edit or enter the bonus guideline Name and Description as needed.
2. Clear the Calculate checkbox to specify the guideline is defined in a guideline lookup matrix.

    The system displays the Row Basis and Divide Columns fields in the Guidelines portlet. Use these fields to define a row and column value basis for the guideline which displays in a matrix in the Guideline Values portlet.

3. Select a Row Basis. Valid values include Performance Rating, Band, Grade and Not Applicable.

    - If you select Band, Grade or Not Applicable proceed to step 6.
    - If you select Performance Rating, the Guideline Rating Selector and Use Floating Point Performance Ranges fields are activated. Then proceed to step 4.

4. Select the guideline rating scale to be used in the guideline lookup matrix.

    Valid values include the following:

    - Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds.
    - PM to Comp - Indicates the performance rating scale is imported from the customer's Taleo Performance application.
    - Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 1.00 - 5.00).

5. Use the Floating Point Performance Ranges checkbox to specify whether or not a floating point performance rating scale is used in the guideline.

    - Leave it cleared if they are not used.
    - Select it if they are used.

6. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

- The guideline name, description and type (calculated or lookup) information are entered and changes saved to the database.
- The guideline lookup matrix is displayed in the Guideline Values portlet, configured for entry of the guideline values for each row and column basis combination.

Next Step

- Use the Guideline Values portlet to edit or enter the guideline values for each combination of the row and column bases.

Guideline Values Portlet

Guidelines are used by managers as a reference point when planning bonus awards for their employees. A bonus plan has one set of guidelines associated with it. Use the Guidelines Values portlet to edit or enter the guideline value matrix. Guidelines can be either calculated or looked up using a row and column value basis (e.g. performance rating against min-target-max). Guideline Values is the second of two portlets used to define bonus guidelines, the first being the Guidelines portlet.

Calculated Guidelines

When the Calculated checkbox is selected in the Guidelines portlet, and the change is saved, the calculated guidelines matrix displays in the Guideline Values portlet. For calculated guidelines, each cell in the guideline matrix has a calculator link. Clicking on the link opens a Calculator. The user enters the calculation for the cell into the Calculator and saves. Once a calculation is saved, the calculation is displayed in the cell as a link instead of "Calculator." The calculation link also opens the Calculator for the clicked upon cell.

Configuration for Calculated Guidelines

The Guideline Values portlet provides the following fields and buttons for calculated guidelines.

Calculated Guideline Values - Fields and Buttons	
Name	**Description**
Column Basis Label	Displays the values for the default column basis (Minimum, Target and Maximum guideline levels).
Calculation	After an equation is entered using the Calculator, the equation appears in this column. For example, a company's practice might be to set up a guideline by multiplying a target by a corporate multiplier. Following this example, the guideline equation "Maximum: Bonus_2_Target_Amount * 1.25" means the maximum bonus awarded should be 1.25 times the value of a data dictionary variable named Bonus_2_Target_Amount.
Action	Contains a button to open the Calculator used to enter an equation.

Example:

The following graphic depicts a calculated guideline.
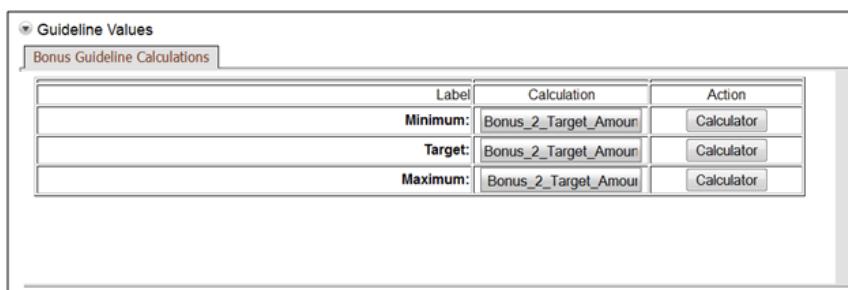
Lookup Guidelines

When the Calculated checkbox is cleared in the Guidelines portlet, and the change is saved, the user enters the row and column basis information for a guideline lookup matrix. When these changes are saved the lookup table displays in the Guideline Values portlet. For each row and column combination in the matrix the user enters a guideline value. Lookup guidelines are typically associated with a column basis having some combination of minimum, midpoint, target or maximum levels. Row level bases are typically an employee's performance rating, salary grade or job level.

Configuration for Lookup Guidelines

The Guideline Values portlet provides the following fields and buttons for lookup guidelines.

Calculated Guideline Values - Fields and Buttons	
Name	Description
Row Basis	Displays the row basis values for the row basis entered on the Guidelines portlet.
Column Basis	Displays the column basis values for the column basis entered on the Guidelines portlet.
Values Entry Fields	Use to enter the bonus guideline values for each row and column basis combination.
Clear	Use to clear the existing data from the entry fields to start over, without saving to the database.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Example:

The following graphic depicts a lookup guideline using performance rating as a row basis. This is the default mode. Min-Max is the column basis.

Download/Upload Guidelines

The Download and Upload Guidelines functionality provides Compensation administrators additional flexibility in managing guidelines for their compensation plans. Administrators can use the Download Guidelines section to download a text file version of a plan guideline. This is useful to document the current configuration (data entry) of guideline values, and to serve as a backup. Administrators can also use the Upload Guidelines section to upload a text file version of a guideline. Once uploaded it can be added to an active plan and further edits/changes can be made directly within the Guidelines and Guideline Values portlets. This allows administrators to make changes to a guideline without having to modify the code for an entire compensation plan manually. Note: An entire plan can be downloaded to an XML file using the Plans page, and will include the code for any guidelines in the plan.

Configuration

The Download Guidelines section provides the following fields and buttons.

Download Guidelines Fields and Buttons.	
Name	Description
File Name	The file name xxxxxGuidelines.txt (where xxxxx is basepay, bonus or stock) populates this field by default. The system uses this as the name for the text file downloaded to your local machine. You can change this name if desired.
Download	Use to initiate the text file download process to your local machine. The file you selected from Plan Name at the top of the page is downloaded with the file name you specified in this section.

Configuration

The Upload Guidelines section provides the following fields and buttons.

Upload Guidelines Fields and Buttons.	
Name	Description
Browse	Use to navigate to and select a guideline text file for uploading to the Compensation database.
File Name	Displays the name of the file you selected for upload. You can rename it prior to upload if desired.
Upload	Use to initiate the text file upload from your local machine to the database.

Downloading Guidelines

Prerequisite

Use to download guideline values from an existing active compensation plan (basepay, bonus or stock) to a local machine as a TXT file.

Configure Plans > Basepay or Bonus or Stock > [Download Guidelines]

Steps

1. Use the Plan Name selector at the top of the page to choose an active plan.
2. In File Name you can either accept the default download file name or rename it as desired.
3. Click download to initiate the download process to your local machine.

Result

The selected plan guideline is downloaded to your local machine, in text file format, to document the current configuration values and provide a backup.

Uploading Guidelines

Prerequisite

Use to upload guidelines and guideline values for a compensation plan (basepay, bonus or stock), in a TXT file, from a local machine to the database.

Configure Plans > Basepay or Bonus or Stock > [Upload Guidelines]

Steps

1. Click Browse to navigate to and select a guideline text file for upload to the database.
2. Click Upload.

Result

The selected guideline and its values are uploaded to the database and can be edited in the Guidelines and Guideline Values portlets as needed.

Create or Modify Budgets

The Create/Modify Budgets portlet allows the compensation administrator to run budget processing on and deploy a selected active compensation plan, from directly within the application. Administrators have the option of running the budget processing without affecting existing planning, or choosing to clear the employee records of existing planning information. They can also run a report producing a text file with data pertaining to the new budget. Running the budget process populates employee planning records with data based on the selected compensation plan's elements; such as budgets, guidelines and eligibility.

Configuration

The Create/Modify Budgets section provides the following fields and buttons.

Create/Modify Budgets Fields and Buttons	
Name	Description
Clear Employee Records	Use to specify whether budget processing will affect existing employee planning records (i.e. percentages or amounts entered by managers for employee increases and awards). When the checkbox is cleared budget processing does the following: • Recalculates budgets. • Updates guidelines. • Updates eligibility. • Does not affect previously saved data entry by managers in employee planning records. When the checkbox is selected budget processing also does the following: • Clears previously saved data entry by managers in employee planning records, so planning by managers will have to be redone.
Create/Modify Budgets	Use to initiate a budget processing run on the selected compensation plan, subject to the value selected in Clear Employee Records. Budget processing is done in blocks of 100 employees at a time.
Get Report	Use to run a report producing a text file with data pertaining to the new budget.
Cancel Budget Creation	Use to stop the budget processing at the boundary of the next 100 employees being processed. The response is not instantaneous, it could take a few minutes. This only stops the budget process, it does not delete any existing budget records.

Running Budget Processing

Prerequisite

• You have made changes to an existing, active compensation plan and need to update the budgeting, guideline and eligibility records in planning.

- You must have selected the plan from Plan Name at the top of the page.

Configure Plans* > *Basepay or Bonus or Stock* > *[Create/Modify Budgets]

Steps

1. Specify whether or not you want to remove existing employee planning information for the plan as part of the budget processing.

    - Select Clear Employee Records only if it is desired to remove existing employee planning data.
    - Clear the checkbox if it is desired to retain existing employee planning data.

2. Click Create/Modify Budgets.

3. Click Get Report for a text file with data pertaining to the new budget.

Result

Budgets, guidelines and eligibility in employee planning records are updated with the modifications made to the plan.

Next Step

- You can use the Test Employee section of the Basepay, Bonus or Stock page to verify employee data generated by the plan is appropriate to how you want the plan to work.
- The next time you open the Plans page the system will reverse engineer the modified plan XML and save it to the database.
- You can download a copy of the plan XML from that page to document the current configuration and provide a backup.

Test Employee

When a compensation administrator has selected an active bonus plan, made changes to it and run budget processing, the Test Employee section of the Bonus page provides them a tool for testing plan values and verifying employee records are created appropriate to the plan. The administrator tests the data by first selecting the Plan Name, then entering an ERP Employee ID for a familiar (test) employee, and then clicking the buttons in the Test Employee section to view the results. Being able to do this data checking from directly within the application saves them considerable time and effort.

Configuration

The Test Employee Section provides the following fields and buttons, listed in the top to bottom order they appear in the Test Employee section of the Bonus page:

Test Employee Fields and Buttons	
Name	Description
Enter ERP Employee ID	Use to enter the identification number of the test employee.
Lookup Employee	Use to initiate a lookup of basic employee information related to the selected compensation plan. Results display in the text area to the right.
Performance Rating	View only field used as a label, no data entry.
Find Ratings	Use to initiate a lookup of the performance rating information for the test employee. Results display in the text area to the right.
Budget	Use to choose a budget for the selected plan.
Lookup Values	Use to initiate a lookup of the budget information for the test employee under the selected budget. Results display in the text area to the right.
Guideline DD	Use to choose the guideline for the selected plan.
Lookup Value	Use to initiate a lookup of the guideline information for the test employee under the selected guideline. Results display in the text area to the right.
Guideline Amount	Use to choose the guideline for the selected plan.
Evaluate	Use to initiate a lookup of and evaluate the guideline amount for the test employee under the selected guideline. Results display in the text area to the right.
Test Eligibility (field)	Use to enter and test an eligibility rule for the selected plan. You can use this feature before making changes in the Eligibility Calculator, or after you have finished editing a plan. You can even copy and paste the equation from the Plan Eligibility Calculator. The important point is to use this feature to see if the results for the test employee are as desired.
	The eligibility rule that is defaulting into the entry field (i.e. (Employee_Manager_Name.equals("Decker, Michael")) is hard coded in

Test Employee Fields and Buttons	
Name	Description
	the HTML setup and provided as an example. You can write over it with the actual rule (such as Employee_Status.equals("Active")) you want to use for the test.
Test Eligibility (button)	Use to initiate a test of the eligibility rule for the test employee under the selected plan. Results display in the text area to the right.
Test Equation (field)	Use to enter and test a calculation for the selected plan. You can use this feature before making changes in the Calculator, or after you have finished editing a plan. You can even copy and paste the equation from the Calculator. The important point is to use this feature to see if the results for the test employee are as desired. The calculation that is defaulting into the entry field (i.e. Bonus_Amount) is hard coded in the HTML setup and provided as an example. You can write over it with the actual calculation you want to use for the test.
Evaluate (button)	Use to initiate a test of the calculation on the test employee under the selected plan and increase type. Results display in the text area to the right.

Testing Employee Data Bonus Plan

Prerequisite

You have selected an existing active bonus plan, made modifications to it, ran budget processing, and now want to test employee records to see if they are appropriate to how you want the plan to work..

Configure Plans* > *Bonus* > *[Test Employee]

Steps

1. Enter the test employee's ERP ID and click Lookup Employee.

   Basic information about the employee under the selected compensation plan displays to the right.

2. Enter selection values and click the associated lookup buttons for each of the remaining fields in the section: Performance Rating, Budget, Guideline DD, Guideline Amount, Test Eligibility and Test Equation.

   Results in the form of plan related data for the test employee under the selected plan display to the right of each field.

3. Review the displayed results and evaluate if the data is appropriate to how you want the plan to work.

4. If there are problems with the employee plan data go back to the other sections of this Bonus page to make the necessary corrections to the plan and rerun budget processing. Then test the plan again. Repeat this process until the employee records appear to be appropriate to how you want the plan to work.

Result

The selected compensation plan is modified, budget processing is run, and plan results are verified for a test employee's records.

Next Step

- The next time you open the Plans page the system will reverse engineer the modified plan XML and save it to the database.
- You can download a copy of the plan XML from that page to document the current configuration and provide a backup.

Configure Stock Plan

The functionality on the Stock page provides Compensation Administrators a tool to select an active stock plan and modify its components. They can create increase types, budgets and guidelines; define budget values and guideline values; and create eligibility rules for the selected plan. This allows administrators to perform these functions from directly within the application and reduces the risk of introducing errors in the plan code. Modifications made to a plan on the Stock page write back to the database and the modified plan XML can be downloaded from the Plans page.

Compensation administrators benefit from using the Stock page in association with the Plans page; providing them a toolkit for administering and configuring stock plans through the user interface:

1. Use the Plans page to upload (if needed) and activate a stock plan.
2. Use the Stock page to modify/edit the plan.
3. Use the Stock page to run the budget for the plan to populate employee records.
4. Use the Stock page's Test Employee function to check whether the plan modifications create valid employee data.
5. Use the Plans page to download a copy of the plan XML to document the current configuration and provide a backup.

There can be one or more stock plan per customer implementation. Stock plans are made up of increase types, budgets and guidelines. A stock plan can have one or more increase types (i.e type of stock increase award, such as restricted stock or stock options). There can be one budget and one set of guidelines per stock increase type. Guidelines for an increase type can be different for different stock plans and budgets. A guideline can be either calculated or looked up by value, but not both. A stock plan has eligibility rules for both its increase types and budgets.

Portlets on the Stock page are collapsible and remain empty until a plan name or component is selected from a drop-down. The Stock page contains the following portlets and sections:

- **Plan Details -** Use the Plan Name selector to choose a plan for modification from a list of the active stock plans in the database. Once an active plan is selected, Plan Details provides entry fields for the plan name, description and whether the stock is allocated in shares or monetary value.
- **Increase Types -** Use to edit, create or delete stock increase types; and define the name, description and stock type (Shares or Cash). It also provides the ability to edit the eligibility rules for the stock increase type.
- **Budgets -** Use to edit, create or delete budgets; and define the name, description, basis, and select associated increase types. It also provides the ability to edit stock budget calculations and budget eligibility rules.
- **Budget Values -** Use to display, edit or enter each budget basis value for the selected budget (e.g. If the basis is Grade the basis values are the salary grades used in the grade scale, such as 10, 11, 12, etc.). The budget is allocated among the basis values.
- **Guidelines -** Use to create, edit or delete guidelines; and display, edit or enter the guideline name and description. Define whether the guideline is either calculated; or looked up using a matrix having a row basis (e.g. Grade), a column basis (e.g. Performance Rating), and a Divide Columns element (e.g. Min-Max). Guidelines are used by managers as a reference point when planning stock awards for their employees.
- **Guideline Values -** Use to display, edit or enter each increase guideline value for each selected budget row and column basis value. For example, a guideline for restricted stock units might be based on employee performance and salary grade; and have entry fields for shares to be allocated for each performance rating/grade combination.
- **Create/Modify Budgets -** Use to run budget processing on and deploy the selected active stock plan.

- **Upload Guidelines -** Use to upload stock guidelines in a TXT file for use in modifying a plan.
- **Download Guidelines -** Use to download stock guidelines in a TXT file to document the current configuration of the guideline values and provide a backup.
- **Test Employee -** Use to test a selected stock plan and verify valid employee records are created.

Note: The Test Employee section is intended to be available to users with the Compensation Administrator role. If it is not visible contact your Taleo Services or Support representative.

The layouts and information provided in this section are examples of common configuration. Actual configuration and information can vary based on your organization's stock plan.

Plan Selection and Details

During preparation for a new compensation cycle it may become necessary to modify an active stock plan for the new cycle. The Plan Name selector at the top of the Stock page provides administrators a list of all the active stock plans in the database from which to select the plan for modification. The Plan Details and other portlets on the page are collapsible and remain empty until a plan name is selected from the drop-down. Once an active plan is chosen the system displays information specific to that plan in the Plan Details portlet, and in the selectors for the other portlets.

Configuration

The following fields and buttons are provided in the Plan Details portlet.

Plan Details Fields and Buttons	
Name	Description
Plan Name	Use to display, edit or enter the plan name for the selected active plan.
Description	Use to display, edit or enter the description for the selected active plan.
Shares or Values	Use to display, edit or enter the budget value basis . Valid values are Value (cash amount) or Shares.
Cancel	Use to revert any unsaved entries and changes to the previous saved values.
Save	Use to save the current entries and changes to the database.

Increase Types Portlet

A stock plan can have one or more increase types (e.g. Restricted Stock or Stock Options). A stock increase type is a label/name mapped to a specific stock type. In the Increase Types portlet the compensation administrator chooses an increase type associated with the previously selected active stock plan, so they can view and modify increase type details such as the increase type name, description, stock type and an increase type eligibility rule. The administrator can also delete existing or create new increase types associated with the stock plan.

There can be one budget and one set of guidelines per increase type. These are associated with the increase type in the Budgets and Guidelines portlets, respectively.

Configuration

The Increase Types portlet provides the following fields and buttons.

Increase Types Fields and Buttons	
Name	Description
Increase Type selector	Use the dropdown list to choose an increase type already defined or associated with the selected stock plan. For example, you might want to choose an increase type because you want to review its elements or make changes to it. Or you can choose an increase type to delete it from the selected plan. You can also add an increase type to the selected plan by choosing Create New from the dropdown list.
Select	Use to select the chosen increase type and populate the other fields in the portlet with increase type details, or to make the fields in the portlet editable for creating a new increase type.
Delete	Use to remove the chosen increase type from the plan.
Increase Type Name	Use to display, edit or enter a unique, client specific name for the increase type. This can differ from the label in the Salary Increase Type dropdown.
Description	Use to display, edit or enter a client specific description of the increase type.
Stock Type	Use to map the increase type label/name to a specific stock type. Taleo predefines certain stock types for system processing. Valid values include: Cash, Performance Share, Promotion Restricted Stock Unit, Promotion Stock Option, Restricted Stock, Restricted Stock Unit, Stock Appreciation Right and Stock Option.
Eligibility Calculator	Use to enter an expression for an eligibility rule that affects the selected stock increase type.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Modifying an Increase Type

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans* > *Stock* > *[Increase Types]

Steps

1. Choose an existing increase type from Select Increase Type.
2. Click Select.
   Increase type details populate the fields in the portlet.
3. Edit the Increase Type Name, Description and Stock Type as needed.
4. Click Eligibility Calculator to view the existing calculation affecting the eligibility rule associated with the increase type. Edit as needed.
5. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Increase Types for the selected active stock plan are displayed, edited as needed, and changes saved to the database.

Creating an Increase Type

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans* > *Stock* > *[Increase Types]

Steps

1. Choose Create New from Select Increase Type.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Enter the new Increase Type Name, Description and Stock Type.
4. Click Eligibility Calculator to enter an expression for an eligibility rule associated with the new increase type.
5. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

A new Increase Type for the selected active stock plan is created and changes saved to the database.

Deleting an Increase Type

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > *Stock* > *[Increase Types]*

Steps

1. Choose an existing increase type from Select Increase Type.
2. Click Delete.

Result

The selected Increase Type is removed from the selected active stock plan.

Budgets Portlet

A stock plan can have one or more stock increase types. Each increase type is associated with a stock increase budget. In the Budgets portlet the compensation administrator chooses a stock budget associated with the previously selected active stock plan, so they can view and modify budget details. They can also add a budget to the plan or delete an existing one from the plan. The Budgets portlet provides entry fields for the budget label/name, description and budget basis; as well as the ability to edit the eligibility rules and calculations for the budget. It is the first of two portlets used to define budgets, the second being the Budget Values portlet.

Configuration

The Budgets portlet provides the following fields and buttons.

Budgets Fields and Buttons	
Name	**Description**
Select Budget Name	Use to choose an existing budget for the selected stock plan to modify or delete it. Or choose Create New from the dropdown to add a budget to the plan.
Select	Use to populate the budget details fields with information about the chosen budget, or to make data entry fields available for creating a new budget.
Delete	Use to remove a budget from the selected stock plan.
Budget Name	Use to edit or enter a client specific name for the budget. This value displays in the Budget Pocket selectors on the Planning and Budget Roll-up pages.
Description	Use to edit or enter a client specific description for the budget.
Basis	Use to edit or enter the Budget Value Basis, if any, by entering the name of the data dictionary variable to be used as the basis. (e.g. Country, Salary Grade, etc.). A typical stock budget basis is Grade. For example, if Grade is the basis, then in the Budget Values page a separate row is displayed for each salary grade value (e.g. 10, 11, 12, etc.).
Manage Increase Types/ Assigned/Available	Use to associate the budget with one or more increase types for the stock plan. Existing increase types for the plan are displayed in Available. Existing increase types associated with the budget are displayed in Assigned. To associate the budget with an increase type, highlight the increase type in Available and use the Arrow button to move it into Assigned. To disassociate (remove) a budget from an increase type, highlight the increase type in Assigned and use the Arrow button to move it into Available. A stock budget can apply to more than one increase type, but the budgeted expenses for the two increase types must add up to the one budget amount.
Eligibility Calculator	Use to review, modify or enter an expression for an eligibility rule that affects the selected budget. When the Eligibility Calculator opens the system displays the existing expression, if any.

Budgets Fields and Buttons	
Name	Description
Budget Calculator	Use to review, modify or enter a stock budget calculation for the selected budget.
Cancel (in association with Save)	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.
Set Budget Values	Use this button after you have finished modifying details in the Budgets portlet, and before moving on to the Budget Values portlet. Use it to activate a process that pulls up every employee in the database and checks which value basis they are a member of (e.g. Country or Salary Grade). The process then builds the structure for the Budget Values portlet. When you activate it a popup message states "Do you want to process the database for current employee budget values? This is a long process."
Cancel (in association with Set Budget Values)	Use to stop the Set Budget Values process if it is stuck while running.

Modifying a Budget

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > ***Stock*** > ***[Budgets]***

Steps
1. Choose an existing budget for the plan from Select Budget Name.
2. Click Select.
    Budget details populate the fields in the portlet.
3. Edit the Budget Name, Description and Basis as needed.
4. In Manage Increase Types, associate the selected budget with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
5. Click Eligibility Calculator to view or edit the eligibility rule associated with the budget.
6. Click Budget Calculator to view or edit the stock budget calculation associated with the budget.
7. Click Set Budget Values to initiate a process that pulls up every employee in the database and checks which value basis they are a member of (e.g. Country or Salary Grade). Then it builds the structure for the Budget Values portlet.
    When you initiate it a popup message states "Do you want to process the database for current employee budget values? This is a long process." In a large database this can take several minutes to run.
8. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

Budgets for the selected active stock plan are displayed, edited as needed, and changes saved to the database.

Next Step

If a budget basis is used in the budget (such as Country), use the Budget Values portlet to enter the budget basis values (in this example as the percent of the total budget allocated to each country).

Creating a Budget

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > Stock > [Budgets]

Steps

1. Choose Create New from Select Budget Name.
2. Click Select.
   Brief instructions populate the editable fields in the portlet.
3. Enter the Budget Name, Description and Basis.
4. In Manage Increase Types, associate the new budget with one or more increase types by moving the desired increase type name(s) from Available to Assigned.
5. Click Eligibility Calculator to enter the eligibility rule associated with the increase type.
6. Click Budget Calculator to enter the stock budget calculation associated with the budget.
7. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

The new budget for the selected active stock plan is created and saved to the database.

Next Step

If a budget basis is used in the budget (such as Country), use the Budget Values portlet to enter the budget basis values (such as percent of the total budget allocated to each country).

Deleting a Budget

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > Stock > [Budgets]

Steps

1. Choose an existing budget from Select Budget Name.
2. Click Delete.

Result

The selected budget is removed from the selected active stock plan.

Budget Values Portlet

The Budget Values Portlet provides a rollbar layout having a tab for each budget defined in the stock plan. The portlet allows the compensation administrator to edit, for each budget, the cash value amount or number of shares to be used for calculating the stock awards budget. This can be done for each of the organization's segments used as a budget basis, if any. Example bases are by country or salary grade. Country is the most usual budget basis. The Budget Values portlet is the second of two portlets used to define budgets, the first being the Budgets portlet.

Each budget tab in the portlet contains a grid to aid the compensation administrator in setting up the budget. Each grid has four columns: Budget Basis, Number of Employees, Amount per Employee and Shares. Only Amount per Employee is editable. The Budget Values portlet is dynamically generated based on the defined stock budgets for the selected stock plan as configured in the Budgets portlet. The Budget Basis and Number of Employee columns are populated by running the Set Budget Values process in the Budgets portlet. A row is displayed for each budget basis element. When the administrator enters a Amount for a row and tabs out of the field, or clicks another field, the system calculates and displays the Shares for the row. When the user saves their entries the system saves results to the database.

Example:

An organization wants to base a restricted stock units budget on salary grade, so the budget basis is set to Grade. In the Budget Values portlet the Budget Basis column displays the salary grades in the budget, and calculates and displays the number of employees in each grade. The Amount per Employee column is editable so the administrator can edit or enter the number of shares to be used in determining the stock award budget.

Budget	Number of Employees	Amount per Employee	Shares
10	1525	0.00	0.00
11	1661	0.00	0.00
12	925	0.00	0.00
13	3055	0.00	0.00
14	2393	0.00	0.00

Configuration

The Budget Values portlet provides the following fields and buttons.

Budget Value Field or Button	
Name	**Description**
Budget tab(s)	Use to select the budget you want to review, modify or enter. Each tab displays a matrix for a stock budget used in the selected stock plan, provided the Set Budget Values process is run for each from the Budgets portlet.

Budget Value Field or Button	
Name	Description
Budget Basis	Displays the budget basis values for the selected budget (e.g. salary grades used when the basis is Grade), provided the budget basis is defined in the Budgets portlet.
Number of Employees	The system dynamically generates the totals for the number of employees for each budget basis value, provided the Budget Basis is defined in and the Set Budget Values process is run in the Budgets portlet.
Amount Per Employee	Use to display, edit or enter the cash or share amounts of stock for the stock award budget..
Shares	The system dynamically calculates the number of shares for each budget basis value once the Amount per Employee is entered and the user clicks on or tabs to another field.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Entering Budget Values

Prerequisite

- Select an active stock plan to modify.
- Enter budget details in the Budget portlet.
- Run the Set Budget Values in the Budget portlet.

Configure Plans > ***Stock*** > ***[Budget Values]***

Steps

1. Review the existing budget basis information in the budget values matrix, if any.

    This information is populated when you enter Budget details in the Budget portlet and then run the Set Budget Values process.

2. Edit or enter an Amount per Employee for each budget basis value (e.g. each salary grade if the basis is Grade).
    The system calculates the Shares for each budget basis value row.

3. Click Save when done entering amounts in each budget basis row.

Result

The changes are saved to the database.

Next Step

Run the budget processing, using the functionality in the Create/Modify Budgets section, to populate employee records with budget data.

Guidelines Portlet

During the compensation planning process managers follow guidelines when making stock award allocations for their employees. In the Guidelines portlet the compensation administrator chooses a stock guideline associated with the previously selected active stock plan, so they can view and modify guideline details. The administrator can also add a guideline to or delete one from the plan. The Guidelines portlet is the first of two portlets used to define stock guidelines, the second being the Guideline Values portlet.

A stock plan can have one or more increase types (e.g. Restricted Stock Units or Stock Options). There can be one set of guidelines per increase type. Guidelines for an increase type can be different for different stock plans.

The guidelines portlet has entry fields for the guideline name and description; assigning the guideline to one or more increase types; and defining whether the guideline is calculated or looked up.

- A calculated guideline provides guidance for the level of stock allocation to be granted an employee based on an equation.
- A guideline lookup matrix provides guidance based on considerations such as performance and salary grade. It has a row basis (e.g. Grade); a column basis (e.g. Performance Rating);and a Divide Columns element (e.g. Min-Max) to define its layout.

The matrix or table for either type displays on the Guideline Values portlet, and is dynamically generated based on the defined stock guidelines for the selected stock plan in the Guidelines portlet. Guidelines are applied to employee records when budget processing is run.

Configuration

The Guidelines portlet provides the following fields and buttons.

Guidelines Fields and Buttons	
Name	Description
Select Guideline Name	Use to choose an existing stock plan guideline for the selected stock plan, to modify or delete it. Or choose the Create a New option from the selector to make a new one.
Select	Use to populate the detail fields in the Guidelines portlet with configuration information for the selected guideline, or make the detail fields editable for a new guideline.
Delete	Use to delete a guideline from a selected stock plan.
Guideline Name	Use to display, edit or enter a client-specific name for a guideline.
Description	Use to display, edit or enter a description for a guideline.
Guideline Increase Type/ Assigned/Available	Use to associate the guideline with one or more increase types for the stock plan. Existing increase types for the plan are displayed in Available. Existing increase types associated with the guideline are displayed in Assigned. To associate the guideline with an increase type highlight the increase type in Available and use the Arrow button to move it into Assigned. To remove a

Guidelines Fields and Buttons	
Name	**Description**
	guideline from an increase type, highlight the increase type in Assigned and use the Arrow button to move it into Available.
Calculate	Use this checkbox to specify whether or not the guideline is calculated: • When it is cleared the guideline is not calculated using equations. Instead, the system displays the Column Basis, Row Basis and Divide Columns fields in the Guidelines portlet. Use these fields to define a row and column value basis for the guideline, which displays in a matrix in the Guideline Values portlet. • When it is selected the guideline is calculated. The row and column basis entry fields in the Guidelines portlet are made unavailable for entry. A default matrix for entering the guideline equations for the minimum, target and maximum values is displayed in the Guideline Values portlet. Guideline values are entered using a Calculator function in that portlet.
Column Basis	This field activates when the Calculate checkbox is cleared. Use to select the guideline column basis for the guideline matrix that displays in the Guideline Values portlet. For example, when a column basis of Performance Rating is selected the column basis values that display in the Guideline Values portlet are the ratings that make up the rating scale (such as Below, Meets, Exceeds and Frequently Exceeds). When the column basis is Performance Rating, the system activates the Guideline Rating Selector and Use Floating Point Performance Ranges fields. Other valid values for the Column Basis are Tiers, Data Dictionary Variable, None and Not Applicable.
Guideline Rating Selector	This field activates when the Calculate checkbox is cleared and the Column Basis is Performance Rating. Use to select the type of rating scale for the guideline lookup matrix. Valid values include the following: • Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds. • PM to Comp - Indicates the performance rating scale is imported from the customer's Taleo Performance application. • Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 0.00 - 5.00).
Use Floating Point Performance Ranges	This field activates when the Calculate checkbox is cleared and the Column Basis is Performance Rating. Use to specify whether a floating point performance rating scale is used in the guideline. Supports a numeric rating scale with decimal values (e.g. from 0.00 - 5.00).
Row Basis	This field activates when the Calculate checkbox is cleared . Use to select the guideline row basis for the guideline matrix that displays in the Guideline Values portlet. Valid values are None, Band , Grade and Data Dictionary Variable.
Divide Columns	This field activates when the Calculate checkbox is cleared . Use to specify the guideline column basis for the guideline matrix that displays in the

Guidelines Fields and Buttons	
Name	Description
	Guideline Values portlet. Valid values are Not Applicable, Target, Min-Max, and Min-Target-Max.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Modifying a Calculated Guideline

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > *Stock* > *[Guidelines]*

Steps

1. Choose an existing stock guideline from Select Guideline Name.
2. Edit the stock guideline Name and Description as needed.
3. Ensure Calculate is selected, to specify the guideline is calculated using equations.

    The row and column basis entry fields in the Guidelines portlet are made unavailable for entry, and a default matrix for entering the guideline equations for the minimum, target and maximum values is displayed in the Guideline Values portlet.
4. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

-   The guideline name, description and type (calculated or lookup) information are entered and changes saved to the database.
-   The calculated guideline matrix is displayed in the Guideline Values portlet, configured for entry of the equations for the minimum, target and maximum values.

Next Step

-   Use the Guideline Values portlet to edit or enter the equations defining the minimum, target and maximum guideline values.

Modifying a Lookup Guideline

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > *Stock* > *[Guidelines]*

Steps

1. Choose an existing stock guideline from Select Guideline Name.
2. Edit the stock guideline Name and Description as needed.
3. Ensure the Calculate checkbox is cleared, to specify the guideline is defined in a guideline lookup matrix.

The system displays the Row Basis and Divide Columns fields in the Guidelines portlet. Use these fields to define a row and column value basis for the guideline which displays in a matrix in the Guideline Values portlet.

4. Select a Column Basis. Valid values include Performance Rating, None, Tiers, Data Dictionary and Not Applicable.

    •   If you select None, Tiers, Data Dictionary or Not Applicable proceed to step 7.
    •   If you select Performance Rating, the Guideline Rating Selector and Use Floating Point Performance Ranges fields are activated. Then proceed to step 5.

5. Select the guideline rating scale to be used in the guideline lookup matrix.

    Valid values include the following:

    •   Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds.
    •   PM to Comp - Indicates the performance rating scale is imported from the customer's Taleo Performance application.
    •   Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 0.00 - 5.00).

6. Use the Floating Point Performance Ranges checkbox to specify whether or not a floating point performance rating scale is used in the guideline.

    •   Leave it cleared if they are not used.
    •   Select it if they are used.

7. Use Row Basis to specify the row basis used in the matrix on the Guideline Values portlet. Valid values include Grade, Band, Data Dictionary and Not Applicable.

8. Use Divide Columns to specify the column division used in the matrix on the Guideline Values portlet. Valid values include Not Applicable, Target, Min-Max and Min-Target-Max.

9. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

•   The guideline name, description and type (calculated or lookup) information are entered and changes saved to the database.
•   The guideline lookup matrix is displayed in the Guideline Values portlet, configured for entry of the guideline values for each row and column basis combination.

Next Step

•   Use the Guideline Values portlet to edit or enter the guideline values for each combination of the row and column bases.

Creating a Calculated Guideline

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans** > **Stock** > **[Guidelines]

Steps

1. Choose the Create A New option from Select Guideline Name.
2. Enter the stock guideline Name and Description.

3. Ensure Calculate is selected, to specify the guideline is calculated using equations.

   The row and column basis entry fields in the Guidelines portlet are made unavailable for entry, and a default matrix for entering the guideline equations for the minimum, target and maximum values is displayed in the Guideline Values portlet.

4. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

- The guideline name, description and type (calculated or lookup) information are entered and changes saved to the database.
- The calculated guideline matrix is displayed in the Guideline Values portlet, configured for entry of the equations for the minimum, target and maximum values.

Next Step

- Use the Guideline Values portlet to edit or enter the equations defining the minimum, target and maximum guideline values.

Creating a Lookup Guideline

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans > ***Stock*** > ***[Guidelines]***

Steps

1. Choose the Create a New Option from Select Guideline Name.
2. Enter the stock guideline Name and Description.
3. Ensure the Calculate checkbox is cleared, to specify the guideline is defined in a guideline lookup matrix.

   The system displays the Row Basis and Divide Columns fields in the Guidelines portlet. Use these fields to define a row and column value basis for the guideline which displays in a matrix in the Guideline Values portlet.

4. Select a Column Basis. Valid values include Performance Rating, None, Tiers, Data Dictionary and Not Applicable.

   - If you select None, Tiers, Data Dictionary or Not Applicable proceed to step 7.
   - If you select Performance Rating, the Guideline Rating Selector and Use Floating Point Performance Ranges fields are activated. Then proceed to step 5.

5. Select the guideline rating scale to be used in the guideline lookup matrix.
   Valid values include the following:

   - Default Perf Scale - Includes the values Below, Meets, Exceeds and Frequently Exceeds.
   - PM to Comp - Indicates the performance rating scale is imported from the customer's Taleo Performance application.
   - Floating Point Scale - Supports a numeric rating scale with decimal values (e.g. from 0.00 - 5.00).

6. Use the Floating Point Performance Ranges checkbox to specify whether or not a floating point performance rating scale is used in the guideline.

   - Leave it cleared if they are not used.

- Select it if they are used.

7. Use Row Basis to specify the row basis used in the matrix on the Guideline Values portlet. Valid values include Grade, Band, Data Dictionary and Not Applicable.

8. Use Divide Columns to specify the column division used in the matrix on the Guideline Values portlet. Valid values include Not Applicable, Target, Min-Max and Min-Target-Max.

9. Save the changes to the database or Cancel to revert the fields with unsaved changes to their previous saved state.

Result

- The guideline name, description and type (calculated or lookup) information are entered and changes saved to the database.
- The guideline lookup matrix is displayed in the Guideline Values portlet, configured for entry of the guideline values for each row and column basis combination.

Next Step

- Use the Guideline Values portlet to edit or enter the guideline values for each combination of the row and column bases.

Deleting a Guideline

Prerequisite

You must have selected an active stock plan to modify.

Configure Plans* > *Stock* > *[Guidelines]

Steps

1. Choose an existing guideline from Select Guideline Name.

2. Click Delete.

Result

The selected guideline is removed from the selected active stock plan.

Guideline Values Portlet

Guidelines are used by managers as a reference point when planning stock awards for their employees. Use the Guidelines Values portlet to edit or enter calculations that define the guideline (a calculated guideline), or a guideline value matrix defined by a guideline row and column basis (a looked up guideline). Guideline Values is the second of two portlets used to define stock guidelines, the first being the Guidelines portlet. Similar to the Budget Values portlet, the Guideline Values portlet is dynamically generated based on the stock guidelines defined in the Guidelines portlet.

A stock plan has one set of guidelines associated with it. Guidelines can be either calculated, or looked up using a row and column value basis (e.g. performance rating against min-target-max).

Calculated Guidelines

When the Calculated checkbox is selected in the Guidelines portlet, and the change is saved, the calculated guidelines matrix displays in the Guideline Values portlet. For calculated guidelines, each row in the guideline matrix has a calculator link. Clicking on the link opens a Calculator. The user enters the calculation for the row basis value into the Calculator and saves. Once a calculation is saved, it is displayed in the cell as a link instead of "Calculator." The displayed calculation link, when clicked on, also opens the Calculator.

Configuration for Calculated Guidelines

The Guideline Values portlet provides the following fields and buttons for calculated guidelines.

Calculated Guideline Values - Fields and Buttons	
Name	**Description**
Row Basis Label	Displays the values for the default row basis (i.e. Minimum, Target and Maximum guideline levels).
Calculation	After an equation is entered using the Calculator, the equation appears in this column. For example, a company's practice might be to set up a guideline by multiplying a target by a corporate multiplier. Following this example, the guideline equation "1200" for the minimum value in the example matrix below means the minimum award should be 1200 options. Once a calculation is entered, and displays here, clicking on the button reopens the Calculator.
Action	Contains a button to open the Calculator used to enter an equation.

Example:

The following graphic depicts a calculated guideline for stock options.

Lookup Guidelines

When the Calculated checkbox is cleared in the Guidelines portlet, and the change is saved, the user enters the column and row basis information for a guideline lookup matrix. When these changes are saved the lookup table displays in the Guideline Values portlet. For each row and column combination in the matrix the user enters a guideline value. Lookup guidelines are typically associated with a column basis having some combination of performance rating. Row level bases are typically an employee's salary grade, band or job level.

Configuration for Lookup Guidelines

The Guideline Values portlet provides the following fields and buttons for lookup guidelines.

Calculated Guideline Values - Fields and Buttons	
Name	Description
Row Basis	Displays the row basis values for the row basis entered on the Guidelines portlet.
Column Basis	Displays the column basis values for the column basis entered on the Guidelines portlet.
Column Divisions	Displays the column division values set up on the Guidelines portlet.
Values Entry Fields	Use to enter the stock guideline values for each row and column basis combination.
Clear	Use to clear the existing data from the entry fields to start over, without saving to the database.
Cancel	Use to revert any unsaved entries back to the previous saved values.
Save	Use to save the current entries and changes to the database.

Example:

The following graphic depicts a lookup guideline for a restricted stock unit award, using performance rating as the column basis and salary grade as the row basis. This is the default mode. In this matrix Min-Max is the Divide Columns value. Employees with the lowest rating (Below) receive no stock

award. Employees with higher ratings at higher grade levels generally receive higher stock awards than those with lower ratings or grades.

Entering Guideline Values

Prerequisite

- You must first have selected an active stock plan to modify.
- The stock guideline you want to enter values for must already be in the Guidelines portlet.

Configure Plans* > *Stock* > *[Guideline Values]

Steps

1. Click the tab for the guideline you want to enter values for.
   The matrix for the selected guideline displays.

2. Review and edit as needed the guideline values for each cell.

   - For calculated guidelines use review a calculation in the Calculation column and edit a calculation by clicking the Calculator button in the Action column.
   - For lookup guidelines review and edit the entry fields for each row and column basis combination.

3. Click Save to write the changes for the displayed guideline to the database.

4. Repeat this process for each guideline you need to edit.

Result

Once the budget processing is run, users will have guidelines to follow when making stock awards for employees during planning.

Download/Upload Guidelines

The Download and Upload Guidelines functionality provides Compensation administrators additional flexibility in managing guidelines for their compensation plans. Administrators can use the Download Guidelines section to download a text file version of a plan guideline. This is useful to document the current configuration (data entry) of guideline values, and to serve as a backup. Administrators can also use the Upload Guidelines section to upload a text file version of a guideline. Once uploaded it can be added to an active plan and further edits/changes can be made directly within the Guidelines and Guideline Values portlets. This allows administrators to make changes to a guideline without having to modify the code for an entire compensation plan manually. Note: An entire plan can be downloaded to an XML file using the Plans page, and will include the code for any guidelines in the plan.

Configuration

The Download Guidelines section provides the following fields and buttons.

Download Guidelines Fields and Buttons.	
Name	Description
File Name	The file name xxxxxGuidelines.txt (where xxxxx is basepay, bonus or stock) populates this field by default. The system uses this as the name for the text file downloaded to your local machine. You can change this name if desired.
Download	Use to initiate the text file download process to your local machine. The file you selected from Plan Name at the top of the page is downloaded with the file name you specified in this section.

Configuration

The Upload Guidelines section provides the following fields and buttons.

Upload Guidelines Fields and Buttons.	
Name	Description
Browse	Use to navigate to and select a guideline text file for uploading to the Compensation database.
File Name	Displays the name of the file you selected for upload. You can rename it prior to upload if desired.
Upload	Use to initiate the text file upload from your local machine to the database.

Downloading Guidelines

Prerequisite

Use to download guideline values from an existing active compensation plan (basepay, bonus or stock) to a local machine as a TXT file.

Configure Plans > Basepay or Bonus or Stock > [Download Guidelines]

Steps

1. Use the Plan Name selector at the top of the page to choose an active plan.
2. In File Name you can either accept the default download file name or rename it as desired.
3. Click download to initiate the download process to your local machine.

Result

The selected plan guideline is downloaded to your local machine, in text file format, to document the current configuration values and provide a backup.

Uploading Guidelines

Prerequisite

Use to upload guidelines and guideline values for a compensation plan (basepay, bonus or stock), in a TXT file, from a local machine to the database.

Configure Plans > Basepay or Bonus or Stock > [Upload Guidelines]

Steps

1. Click Browse to navigate to and select a guideline text file for upload to the database.
2. Click Upload.

Result

The selected guideline and its values are uploaded to the database and can be edited in the Guidelines and Guideline Values portlets as needed.

Create or Modify Budgets

The Create/Modify Budgets portlet allows the compensation administrator to run budget processing on and deploy a selected active compensation plan, from directly within the application. Administrators have the option of running the budget processing without affecting existing planning, or choosing to clear the employee records of existing planning information. They can also run a report producing a text file with data pertaining to the new budget. Running the budget process populates employee planning records with data based on the selected compensation plan's elements; such as budgets, guidelines and eligibility.

Configuration

The Create/Modify Budgets section provides the following fields and buttons.

Create/Modify Budgets Fields and Buttons	
Name	Description
Clear Employee Records	Use to specify whether budget processing will affect existing employee planning records (i.e. percentages or amounts entered by managers for employee increases and awards). When the checkbox is cleared budget processing does the following: • Recalculates budgets. • Updates guidelines. • Updates eligibility. • Does not affect previously saved data entry by managers in employee planning records. When the checkbox is selected budget processing also does the following: • Clears previously saved data entry by managers in employee planning records, so planning by managers will have to be redone.
Create/Modify Budgets	Use to initiate a budget processing run on the selected compensation plan, subject to the value selected in Clear Employee Records. Budget processing is done in blocks of 100 employees at a time.
Get Report	Use to run a report producing a text file with data pertaining to the new budget.
Cancel Budget Creation	Use to stop the budget processing at the boundary of the next 100 employees being processed. The response is not instantaneous, it could take a few minutes. This only stops the budget process, it does not delete any existing budget records.

Running Budget Processing

Prerequisite

• You have made changes to an existing, active compensation plan and need to update the budgeting, guideline and eligibility records in planning.

- You must have selected the plan from Plan Name at the top of the page.

Configure Plans* > *Basepay or Bonus or Stock* > *[Create/Modify Budgets]

Steps

1. Specify whether or not you want to remove existing employee planning information for the plan as part of the budget processing.

   - Select Clear Employee Records only if it is desired to remove existing employee planning data.
   - Clear the checkbox if it is desired to retain existing employee planning data.

2. Click Create/Modify Budgets.

3. Click Get Report for a text file with data pertaining to the new budget.

Result

Budgets, guidelines and eligibility in employee planning records are updated with the modifications made to the plan.

Next Step

- You can use the Test Employee section of the Basepay, Bonus or Stock page to verify employee data generated by the plan is appropriate to how you want the plan to work.
- The next time you open the Plans page the system will reverse engineer the modified plan XML and save it to the database.
- You can download a copy of the plan XML from that page to document the current configuration and provide a backup.

Test Employee Stock

When a compensation administrator has selected an active stock plan, made changes to it and run budget processing, the Test Employee section of the Stock page provides them a tool for testing plan values and verifying employee records are created appropriate to the plan. The administrator tests the data by first selecting the Plan Name, then entering an ERP Employee ID for a familiar (test) employee, and then clicking the buttons in the Test Employee section to view the results. Being able to do this data checking from directly within the application saves them considerable time and effort.

Configuration

The Test Employee Section provides the following fields and buttons, listed in the top to bottom order they appear in the Test Employee section of the Stock page:

Test Employee Fields and Buttons	
Name	**Description**
Enter ERP Employee ID	Use to enter the identification number of the test employee.
Lookup Employee	Use to initiate a lookup of basic employee information related to the selected compensation plan. Results display in the text area to the right.
Performance Rating	View only field used as a label, no data entry.
Find Ratings	Use to initiate a lookup of the performance rating information for the test employee. Results display in the text area to the right.
Enter Budget	Use to choose a budget for the selected plan.
Lookup Values	Use to initiate a lookup of the budget information for the test employee under the selected budget. Results display in the text area to the right.
Enter Guideline DD	Use to choose a guideline for the selected plan.
Lookup Value	Use to initiate a lookup of the guideline information for the test employee under the selected guideline. Results display in the text area to the right.
Test Eligibility (field)	Use to enter and test an eligibility rule for the selected plan and increase type. You can use this feature before making changes in the Eligibility Calculator, or after you have finished editing a plan. You can even copy and paste the equation from the Increase Type or Budget Eligibility Calculator. The important point is to use this feature to see if the results for the test employee are as desired.
	The eligibility rule that is defaulting into the entry field (i.e. (Employee_Manager_Name.equals("Decker, Michael")) is hard coded in the HTML setup and provided as an example. You can write over it with the actual rule (such as Employee_Status.equals("Active")) you want to use for the test.

Test Employee Fields and Buttons	
Name	Description
Test Eligibility (button)	Use to initiate a test of the eligibility rule for the test employee under the selected plan and increase type. Results display in the text area to the right.
Test Equation (field)	Use to enter and test a calculation for the selected plan and increase type. You can use this feature before making changes in the Calculator, or after you have finished editing a plan. You can even copy and paste the equation from the Calculator. The important point is to use this feature to see if the results for the test employee are as desired. The calculation that is defaulting into the entry field (i.e. Stock_Proposed * 0.8) is hard coded in the HTML setup and provided as an example. You can write over it with the actual calculation you want to use for the test.
Eval Equation (button)	Use to initiate a test of the calculation on the test employee under the selected plan and increase type. Results display in the text area to the right.

Testing Employee Data Stock Plan

Prerequisite

You have selected an existing active stock plan, made modifications to it, ran budget processing, and now want to test employee records to see if they are appropriate to how you want the plan to work..

Configure Plans > *Stock* > *[Test Employee]*

Steps

1. Enter the test employee's ERP ID and click Lookup Employee.

   Basic information about the employee under the selected compensation plan displays to the right.

2. Enter selection values and click the associated lookup buttons for each of the remaining fields in the section: Performance Rating, Enter Budget, Enter Guideline DD, Test Eligibility and Test Equation.

   Results in the form of plan related data for the test employee under the selected plan display to the right of each field.

3. Review the displayed results and evaluate if the data is appropriate to how you want the plan to work.

4. If there are problems with the employee plan data go back to the other sections of this Stock page to make the necessary corrections to the plan and rerun budget processing. Then test the plan again. Repeat this process until the employee records appear to be appropriate to how you want the plan to work.

Result

The selected compensation plan is modified, budget processing is run, and plan results are verified for a test employee's records.

Next Step

- The next time you open the Plans page the system will reverse engineer the modified plan XML and save it to the database.
- You can download a copy of the plan XML from the Plans page to document the current configuration and provide a backup.

HR Administration Page

When you log in using the HR Admin role the system automatically defaults you to the HR Administration tab.

You have the following tab and menu options:

- My Info - to change your password and/or security question.
- Member - to search for any employee in the system for which you have been granted security permission and display the Member View for the selected employee.
- Manager - to search for any manager in the system for which you have been granted security permission and display the Manager Summary View for the selected manager.
- Manager Reports - to run the standard set of reports for any manager in the system for which you have been granted security permission, displaying information for those employees in the selected manager's scope of supervision.
- HR Reports - to run employee data export reports for employees in the system, displaying information for those employees which you have been granted security permission to view.
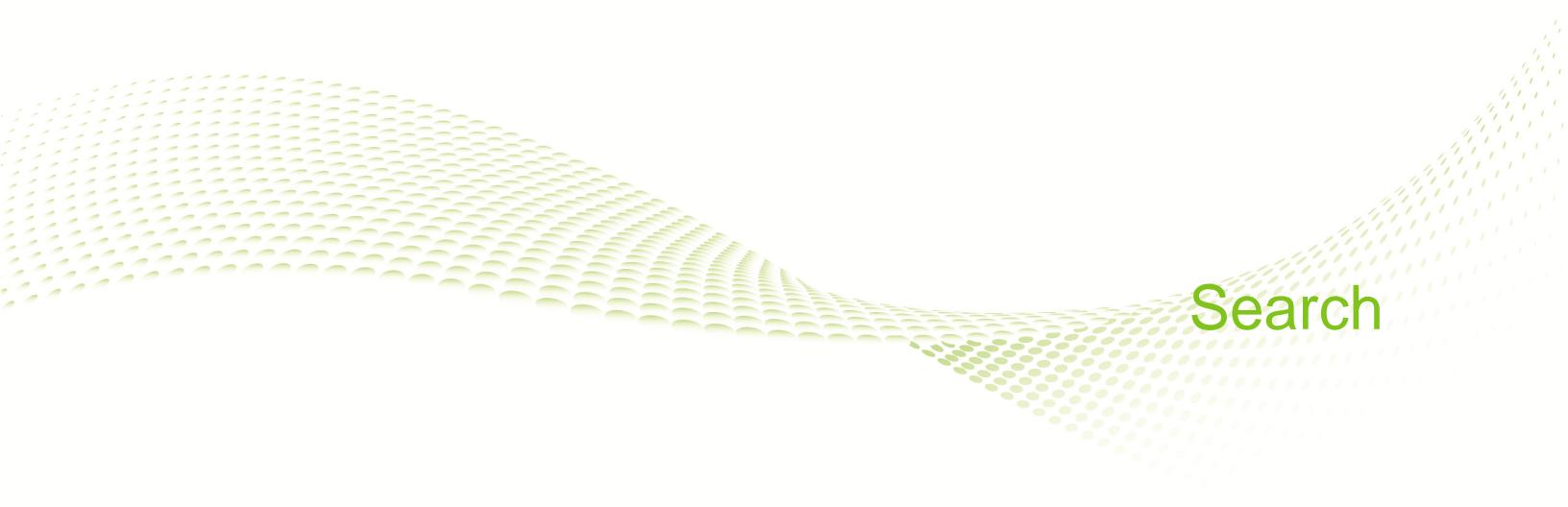
Search

Member Search

Use the Member Search to locate a specific employee or manager in your organization without having to drill down through the Manager Summary and All Employee views.

Search for employees and managers by employee ID, last name, or first name. Partial name or ID searches are allowed. At least one character in one of these search criteria fields is required to complete a search. Wildcard characters are assumed to be appended to the entry in these fields, thus more characters refine the search results.

Use the Employee/Manager selector to determine the search type. If the person is a manager, they will show in the search results only when "Manager" is selected. Select the radio button for the manager you wish to view and click Select. The Manager Summary and All Employee Views will display that manager's organization. If a person has no direct reports, they will show in the search results only when "Employee" is selected. When you click the radio button for the employee you wish to view and click Select, the Member View displays that employee's data.

Using Member Search

Prerequisite

You must be logged into the system using a Manager or HR Administrator role.

Manager role > *Budget Rollup* > *Member Search* >

HR Admin role > *Member Page* > *Member Search* >

Steps
1. Enter search criteria.
2. Optional. Select the member type to search from the drop-down, if available.
    *   Employee
    *   Manager
3. Click Search.
4. In Search Results click the radio button adjacent to the desired member name.
5. Click Select to view the associated information in the Member view.

Result

A person's planning information displays without having to drill down through the hierarchy in the Manager Summary and All Employees views.

Next Step

Review and edit the planning information as needed.

Member View

Use the Member View to see detailed information about, and perform compensation planning for, a selected employee in their local currency.

It appears on several pages in the system associated with either the Manager or HR Admin role:

*   Team Relationships

- Planning
- Budget Rollup
- Member
- Manager

The view is a series of tabbed pages on a rollbar, and can be minimized or maximized at your convenience. The compensation plans for which a selected employee is eligible determine which tabs display across the rollbar. If an employee is not eligible for bonus, stock or allowances, those tabs do not appear. Tabs are divided into sections called panels.

Planning in the Member View

Prerequisite

You must have selected the employee using either a datagrid view (Direct Team or All Employees) or a search view (Member or Manager Search).

Access from several pages in the system.

Steps

1. Enter proposed increases and awards in percentages or amounts.

   Use the budget and guideline information displayed in the various tabs, the History and Last Modified links, and other information provided to inform your decisions. Click on blue hypertext links anywhere within the Member View to open pop-ups called Library Content. They provide valuable information about the data element selected.

2. Click Save or Cancel when done planning for the employee.

3. Return to the parent view (datagrid) to continue planning for other employees in the team.

Result

Compensation planning for an individual employee is aided by using a view containing detailed information for that person.

Member View Settings

Member views within Taleo Compensation are highly configurable. This table details a typical configuration for the Member View.

Roll Bar Tab or Link	Description
Base Pay	The Base Pay tab displays a detailed before and after snapshot of the selected employee's salary information in the employee's local currency. It has three panels: • Current Base Pay - provides the selected employee's current salary, job and grade information. • Proposed Annual Increases - provides the ability to make recommendations for base pay adjustments. • New Base Pay - provides the same information as Current Base Pay, including any increases awarded and the relative results. The Proposed Annual Increases panel includes these features: • Supports plan types such as Merit, Lump Sum, Promotion and Adjustment. • Enter increases using the same editable fields as in the Direct Team View: adjustment Percent and Amount (fields cross calculate).

Roll Bar Tab or Link	Description
	• As you enter awards the totals and respective Budget Summary amounts dynamically update. • Guidelines are included based on base pay elements such as maximum, minimum and target amounts, performance ratings, compa-ratio and position in range. • Validations applied to your recommendations flag violations of the guidelines. • Alert dialogs can require that you acknowledge going outside the guideline and remind you to leave a reason in the Comment panel. • Prorated amounts display the portion of the increase to be applied based on the employee's hire date. • Tabbing or clicking out of an editable field will enable the Cancel and Save buttons.
Allowances	The Allowances tab has one panel called Current Allowances which displays a list of any allowance types for which the selected employee is eligible. Amounts are in the employee's local currency. If the employee is not eligible for allowances the tab will not appear in the view.
Bonus	The Bonus tab displays the factors, weights and targets that go into the bonus calculation for your organization. Amounts are shown in the employee's local currency. It also provides editable fields for you to enter recommendations for the employee's bonus payout. The Bonus tab has two panels: • Business Assignment and Performance - provides bonus calculation information for the selected employee as well as your recommended individual award factor or percent. • Bonus Payout - displays the recommended bonus award amount resulting from the bonus plan calculation. The Bonus tab includes these features: • Enter either the Individual Factor Percent or the Bonus Payout Amount, the fields cross calculate. • As you enter awards are the Bonus Budget Summary's Allocated and Available amounts dynamically update. • Guidelines are included based on bonus elements such as maximum, minimum and target amounts. • Validations applied to your recommendations flag violations of the guidelines.
Stock	The Stock tab displays information needed to plan long-term equity incentives for your employees. Monetary amounts are shown in the employee's local currency. The Stock tab has three panels: • Stock Award Guideline - displays guideline and target information for the selected employee. • Proposed Award - provides an editable field for recommending the shares or value of the stock award. • Stock Awards - displays the award type, price per share, and total value of the shares. The Stock tab includes these features: • Depending on your organization stock types can include stock options, restricted stock units and more. • Stock awards can be made in stock units (shares) or value. • As you make share recommendations the value is calculated and the Stock Bonus Budget Summary's Allocated and Available amounts dynamically update.

Roll Bar Tab or Link	Description
	• Guidelines are included based on bonus elements such as maximum, minimum and target amounts. • Validations applied to your recommendations flag violations of the guidelines.
Performance	Use the Performance tab to review and edit the Performance Rating for the selected employee. It has one panel called Performance Rating, which displays the employee's Performance Rating value and the rating value description.
Profile	The Current Profile tab provides additional information for the selected employee. It has three panels: • Employee - displays name, ID hire and status information for the employee. • Organization - displays manager, location and organizational hierarchy information for the employee. • Job - identifies employee's position within the organization. There are no editable fields in any of the three panels. If there is incorrect information displayed, please check with your Human Resources representative.
Data Override	The Data Override is for the HR Admin role only. It provides the ability to override, on a single page, the current Base Pay, Bonus and Stock data for those employees for which they have security permissions granted. It has two panels: • Manager and Base Pay Override - provides the ability to override hierarchy and Base Pay information for the selected employee. • Incentive Data Override - provides the ability to override bonus and stock award information for the selected employee.
Comments	The Comments tab is required to be completed in the event any employee is awarded a salary adjustment outside of guidelines. Make sure to include your name and date when entering the comment. When you are finished, tab or click outside of the test field to enable the Save button and save your comment.
History	Click History links to display the salary, bonus, and stock history for the current employee in the Member View. This is a pop-up window and is display only. There are no editable fields for history.
Last Modified	Click Last Modified links to display the details on the last modification of the salary planning for the current employee. This is a pop-up window and is display only. There are no editable fields for Last Modified.

HR Admin Data Override Settings

Panel and Section	Description
Manager and Base Pay Data Override > Manager Override	Use this section to search for, select and change the selected employee's manager to a new one. 1. Click Change to open the Manager Override panel. 2. Search for a new manager by ID or name. You can only search for managers for which you have security permissions. 3. Select the new manager's name.

Panel and Section	Description
	4. Click Change to switch the selected employee's manager to the new one, and recalculate budgets for all affected managers.
Manager and Base Pay Override > Base Pay Data Override	Use this section to edit the selected employee's Current Annual Salary, update related fields, and identify which increase types the employee is eligible for. To override an employee's eligibility for any of the available increase types enter the following: • 0 = ineligible • 1 = eligible If marked as ineligible, then the increase type does not appear on the Base Pay tab for the selected employee.
Incentive Data Override > Bonus Incentive Data Override	Use this section to update the following data elements for an Bonus Plan for which the selected employee is eligible. • Bonus Target % • Eligible Earnings
Incentive Data Override > Stock Incentive Data Override	Use this section to update the following Stock Award guideline elements for any stock plan for which the selected employee is eligible: • Stock Minimum • Stock Target • Stock Maximum

Manager Search

The Manager Search allows you to search for a specific manager in your organization.

Search for Managers by employee ID, last name, or first name. Partial name or ID searches are allowed. At least one character in one of these search criteria fields is required to complete a search. Wildcard characters are assumed to be appended to the entry in these fields, thus more characters refine the search results.

Using Manager Search

Prerequisite

You must be logged in as the HR Admin role.

***HR Administration tab** > **Manager** > **[Manager Search]** >*

Steps
1. Enter search criteria.
2. Click Search.
3. In Search Results click select next to the name of the manager whose records you want to open.
4. Click Select.

Result

The records for the manager's team display in the Manager Summary View.

Manager Summary View

The Manager Summary View is for second level managers and higher in the hierarchy, as well as users with the HR Admin role. It provides a total budget view and planning submission status for the selected manager's direct reporting team. It also provides the HR Admin the ability to view and compare the budgets and allocations for the selected manager. The selected manager's Budget Pocket is not available to the HR Admin. The Manager Summary Views within Taleo Compensation are highly configurable. Important!: Hard alerts are not supported on option selectors in the datagrid. This table details a typical configuration for the Manager Summary View.

Column or Label	Description	Editable
Currency Selector	The Currency selector converts currency values in the Manager Summary View and defaults to US Dollars. If multiple currencies are in use then you can use the selector to choose an eligible currency for the table display. Using this selector does not change which currency in which an employee is paid, it only changes how you view the currency values in the table.	Choose Selection
Manager Name	Displays a list of managers that report to the user. This list can be drilled down to the next lower level of the hierarchy by clicking the name of a manager. When you drill down to a first level manager, the data grid will be empty. You can move back up the hierarchy by clicking the up arrow.	No

Column or Label	Description	Editable
Done Ratio	Indicates the number of employee planning records that are completed against the total number of employees for the manager's entire organization.	No
Submit Date	Displays the date when the manager submitted their compensation planning. Once submitted all views are rendered view only to the submitting manager.	No
Undo Submit	Once submitted, the submitting manager can no longer make changes unless the next higher manager clicks the "Undo Submit" check box. Higher level managers can also plan for a subordinate. A user with the HR Admin role can also undo the planning submittal for the population of managers they are given permissions for.	Yes
Base Pay, Bonus or Stock	Budget or Target, Allocated and Available amounts are displayed for the applicable compensation plans.	No
Direct Team	The Direct Team line represents the budget information for the manager's direct reports, same as information in the Budget Summary on the Direct Team view.	No
Totals	The Totals line represents the sum of the direct reporting managers' entire organization plus the Manager's own direct team.	No
Save	Allows the user to save changes, but does not submit the changes to the next level in the hierarchy.	No
Submit	Sends the user's planning changes to the next higher level in the hierarchy. Users cannot submit a plan until all subordinates have completed planning and submission and planning is completed for the user's direct team. Planning can occur only on the All Employee View in Direct Team mode and the Member View section of the Budget Roll-up page.	No

All Employee View

The All Employee View is a table similar to the Direct Team View. It lists every direct and indirect reporting employee in a manager's organization.

As you drill down through the Manager Summary View on a page (e.g. Budget Rollup or Manager) the All Employee View displays the employees assigned to the manager whose name you selected.

Based on the number of employees to display, the list can be scrolled vertically and horizontally. The default setting is to display 50 rows at a time.

Use Filter to view different segments of the employee population (e.g. All Employees or Direct Team). Unlike the Direct Team View, the All Employee View has editable fields only when Direct Team has been selected from the Filter pulldown menu. The All Employees filter results are read only.

The Currency selector converts currency values in the All Employees View. Using this selector does not change which currency in which an employee is paid, it only changes how you view the currency values in the table.

When you click on an employee's name in the All Employee View, their details load in the Member View below. This provides editing capabilities for any employee assigned to the hierarchy within a manager's organization. Edits in the Manager View will reflect in the All Employee View, Member View, and Budget Summary.

Important!: Hard alerts are not supported on option selectors in the datagrid.

Member View

For a detailed description of the Member View see the section of this document under the Table of Contents navigation **Search > Member Search > Member View**, and its related sections **Planning in the Member View**and **Member View Settings.**
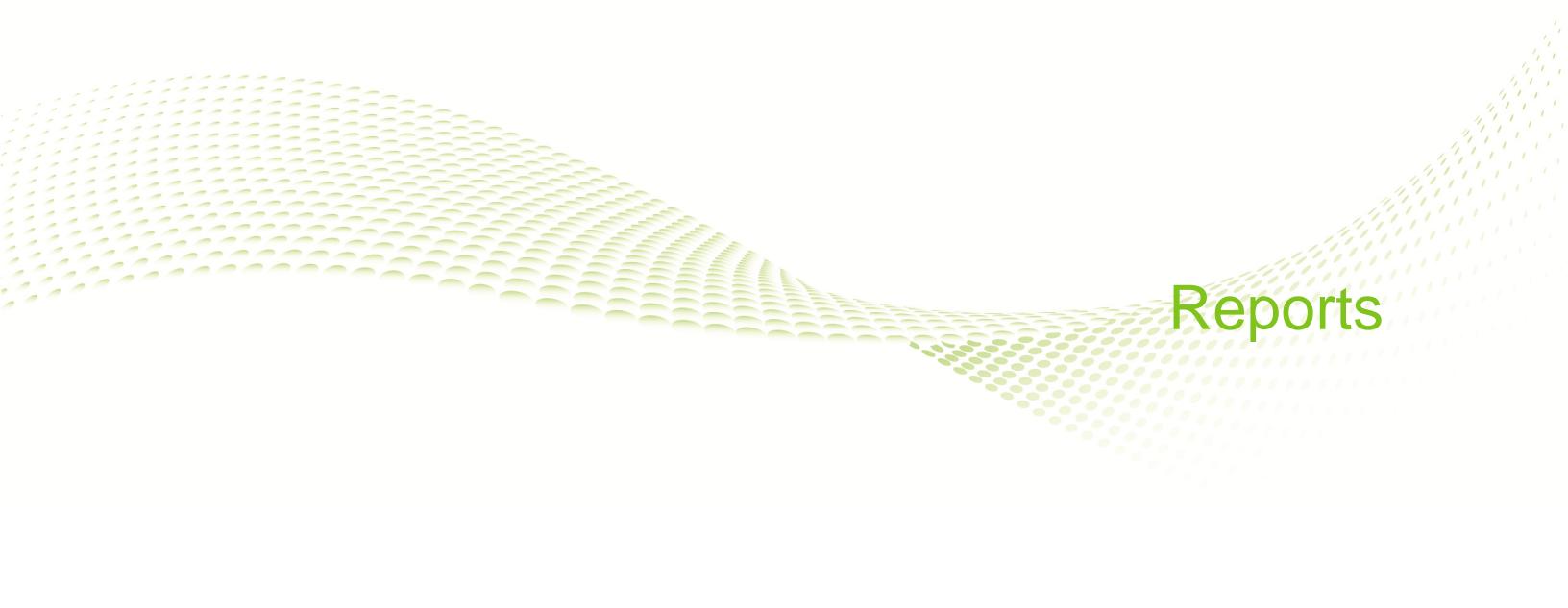
Reports

Reports

Standard reports are available to employees who have the Manager or HR Administrator role granted. Reports can be run one at a time from the Reports page, and are run in real-time.

The Reports page enables managers and HR administrators to choose the population of employees that appear on a report. Sorting options can still be applied to the population. Populations available for selection depend on your role and the report, but can include from among the following options:

- All Managers
- Direct Reporting Managers
- Non-direct Reporting Managers
- Direct Team Only
- All Employees
- Employees Without Direct Reports
- Direct Reports Only

Filters can be configured to include any criteria determined by your organization. Contact Taleo Support for details.

The four standard reports are available to Managers, and HR Administrators running the reports on behalf of a planning manager:

- Manager Summary
- Employee Compensation
- Employee Data Export
- Employee Letter

Four additional standard reports available to employees HR Administrators only are:

- HR Employee Data Export 1
- HR Employee Data Export 2
- HR Audit Report
- Out of Guidelines Report

Custom reports can be added to the standard reporting feature at additional cost by contacting Taleo support. These reports can include graphs, subtotals, and totals.

Detailed Executive reports are also available at an additional cost by contacting Taleo Support. Also see the Performance Management Universe Data Dictionary for detailed information on available objects.

Running a Report

Prerequisite

Manager role* > *Rewards Planning* > *Reports

HR Administrator role* > *HR Administration* > *Manager Reports* > *Reports

HR Administrator role* > *HR Administration* > *HR Reports* > *Reports

Steps

1. Click the radio button adjacent to the desired report.
2. Select the desired population filter.

See the section in this document for the individual report for more information on available filters.

3. Select the desired sort order.

    See the section on the individual report for more information on available sort options.

4. Click Run Report.
    The Progress meter will read 100% when the data is ready for viewing. Then the Get Report button is activated.

5. Click Get Report.

6. Use the File Download screen to Save the report to the desired location.

Result

Reports execute and can be saved to a convenient location for viewing, printing, distribution and export to other systems as appropriate.

Manager Summary Report

The Manager Summary Report provides a summary of planning status and pay allocation in comparison to budget, by planning manager. This report reflects the information in the Member Summary View on the Budget Roll-up page. The output format for this report is a PDF file. Taleo Compensation is configurable and the reports in your system may vary. The Baseline configuration for this report layout is detailed in the following table and example:

Filter by (Population)	First Sort	Second Sort
All Managers	Manager Name	Number of Employees
Direct Reporting Managers		
All Non Direct Reporting Managers		
Direct Team Only		

Focal Recommendations Analysis

Manager: Decker, Michael
Date: Fri, Mar 23, 2012 9:27 AM EDT

MANAGER NAME	Merit Budget	Merit REC (USD)	Merit REC AVG %*	Promotion Budget	Promotion REC (USD)	Promotion REC AVG %*	Adjustment Budget	Adjustment REC (USD)	Adjustment REC AVG %*	Lump Budget	Lump REC (USD)	Lump REC AVG %*	ELIG #EEs	REC #EEs	REC % of EEs	ALL BASE PAY BUDGET	ALL BASE PAY RECOMM	ALL BASE PAY AVAILABLE
Coleman, Jonathan	5,975	5,902	4.30%	1,588	0	0.00%	1,588	0	0.00%	0	0	0	10	3	30.00%	9,150	5,902	3,248
Savard, Julia	33,730	5,000	9.80%	5,080	22,000	43.14%	5,080	0	0.00%	0	0	0	37	1	2.70%	43,890	27,000	16,890
Stevenson, Henry	538	0	0.00%	108	0	0.00%	108	0	0.00%	0	0	0	1	0	0.00%	754	0	754
Washington, Rene	24,669	440	1.00%	3,674	0	0.00%	3,674	0	0.00%	0	0	0	30	1	3.33%	32,016	440	31,576
Total		11,342	3.78%		22,000	10.78%		0	0.00%				78	5	6.41%	85,810	33,342	52,468

MANAGER NAME	Bonus 1 Budget ELIG #EE's	Bonus 1 Budget REC #EE's	Bonus 1 Budget REC % OF EEs	Bonus 1 Budget Budget	Bonus 1 Budget REC (USD)	Bonus 1 Budget REC AVG %*	Bonus 2 Budget ELIG #EE's	Bonus 2 Budget REC #EE's	Bonus 2 Budget REC % OF EEs	Bonus 2 Budget Budget	Bonus 2 Budget REC (USD)	Bonus 2 Budget REC AVG %*	All Bonus ELIG #EEs	All Bonus REC #EEs	All Bonus REC % of EEs	All Bonus BUDGET	All Bonus RECOMMENDED	All Bonus AVAILABLE
Coleman, Jonathan	10	10	100.00%	70,208	46,829	10.01%	0	0	0.00%	0	0	0.00%	10	10	100.00%	70,208	46,829	23,379
Savard, Julia	37	37	100.00%	576,385	355,444	10.60%	1	0	0.00%	12,338	0	0.00%	38	37	97.37%	588,723	355,444	233,279
Stevenson, Henry	1	1	100.00%	42,535	28,371	10.01%	0	0	0.00%	0	0	0.00%	1	1	100.00%	42,535	28,371	14,164
Washington, Rene	30	30	100.00%	453,277	300,584	11.24%	2	0	0.00%	18,425	0	0.00%	32	30	93.75%	471,701	300,584	171,118
Direct Reports	6	5	83.33%	71,592	47,752	0.00%	3	0	0.00%	40,119	0	0.00%	9	5	55.56%	111,710	47,752	63,959
Total	84	83	98.81%		778,978	8.37%	6	0	0.00%		0	0.00%	90	83	92.22%	1,284,877	778,978	505,899

Employee Compensation Report

The Employee Compensation Report provides a summary of compensation planning by employee. This report reflects the information in the Direct Team View on the Planning page. The output format for this report is a PDF file. Taleo Compensation is configurable and the reports in your system may vary. The Baseline configuration for this report layout is detailed in the following table and example:

Filter by (Population)	First Sort	Second Sort
All Employees	Name	Name
Employees Without Direct Reports	Title	Title
Direct Reports Only	Currency	Currency
	Current Base Pay	Current Base Pay
	New Base Pay	New Base Pay

Employee Compensation Report

Decker, Michael
22-Nov-2011 at 16:23:35 EST

Full Name	Job Title	Salary Grade	Dept Code	Perf Rating	Curr Ann Sal Local	Merit Pct	Adj Pct	Promo Pct	New Ann Sal Local	New Compa Ratio	Lump Amt Local	Plan 1 Bonus Amt	Plan 2 Bonus Amt	Proposed Shares Budget	Proposed Share Value Budget		
Adams, R	Software	14	SD	3	45,000.00	0.0	0.0	0.0	45,000.00	1.05	0.00						
Alaoui, Y	Codificat:	15	OP	3	30,000.00	0.0	0.0	0.0	30,000.00	0.89	0.00						
Antilou, I	Sr. Softw	16	SD	2	62,000.00	0.0	0.0	0.0	62,000.00	1.27	0.00						
Baker, Cl	Software	14	SD	4	289,626.1	0.0	0.0	0.0	289,626.1	1.02	0.00						
Becker, B	Germany	17	OP	2	62,243.00	0.0	0.0	0.0	62,243.00	1.56	0.00						
Black, Ja	Technical	15	SD	1	283,566.3	0.0	0.0	0.0	283,566.3	0.95	0.00						
Brown, F	Internal A	17	OP	2	40,000.00	0.0	0.0	0.0	40,000.00	1	0.00						
Bryant, R	Software	14	SD	1	40,000.00	0.0	0.0	0.0	40,000.00	0.93	0.00						
Campbell	Sr. Softw	16	SD	3	57,362.12	0.0	0.0	0.0	57,362.12	1.17	0.00						
Chew, M	Sr. Softw	16	SD	2	61,500.00	0.0	0.0	0.0	61,500.00	1.26	0.00						
Clark, Ka	Superviso	17	SD	2	58,000.00	0.0	0.0	0.0	58,000.00	1.07	0.00						
Coleman,	Sr. Direct	23	SD	2	87,457.93	0.0	0.0	0.0	87,457.93	0.96	0.00						
Collins, F	Software	14	SD	3	2,046,384	0.0	0.0	0.0	2,046,384	1.05	0.00						
Cooper, I	Software	14	SD	3	45,494.09	0.0	0.0	0.0	45,494.09	1.06	0.00						
Cox, Ted	Software	14	SD	2	43,250.00	0.0	0.0	0.0	43,250.00	1.01	0.00						
Crawford	Software	14	SD	3	41,750.00	0.0	0.0	0.0	41,750.00	0.97	0.00						
DePaz, A	Software	14	SD	2	34,500.00	0.0	0.0	0.0	34,500.00	0.8	0.00						
Dew, Stu	Software	14	SD	2	42,000.00	0.0	0.0	0.0	42,000.00	0.98	0.00						
Diau, Rac	Personal .	17	OP	3	41,330.00	0.0	0.0	0.0	41,330.00	1.04	0.00						
Diouf, Ac	Codificat:	15	OP	3	30,500.00	0.0	0.0	0.0	30,500.00	0.91	0.00						
Dioum, K	Group RE	15	OP	1	38,000.00	0.0	0.0	0.0	38,000.00	1.13	0.00						
Drechsler	Germany	18	OP	4	68,355.00	0.0	0.0	0.0	68,355.00	1.51	0.00						
Eng, Hele	Director o	21	SD	2	59,151.56	0.0	0.0	0.0	59,151.56	0.94	0.00						

Nov 22, 2011 4:23 PM

Employee Data Export

The Employee Export Report provides a summary of key data elements for each employee record maintained in the system, including employee identifying and planning data. This report reflects the

information in the All Employees View on the Budget Roll-up page. The output format for this report is a CSV file. Taleo Compensation is configurable and the reports in your system may vary. The Baseline configuration for this report layout is detailed in the following table and example:

Filter by (Population)	First Sort	Second Sort
All Employees	Employee Name	Employee Name
Employees Without Direct Reports	Company	Company
Direct Reports Only	Title	Title
	Hire Date	Hire Date
	Annual Salary	Annual Salary

Employee Data Export

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ERP ID	Full Name	Job Code	Job Title	Salary Grade	Employee	FSLA Status	Full/Part T	Standard	Business Unit	Dept Code	Dept Name	Company Na
2	radams	Adams, Re	D9474	Software Developer	14	Active	Exempt	FT	40	DIRBM	SD	Software Development	New Millenni
3	yalaoui	Alaoui, Yo	O2911	Codification 1	15	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
4	mantilou	Antilou, M	D9844	Sr. Software Developer	16	Active	Exempt	FT	40	ARCH	SD	Software Development	New Millenni
5	cbaker	Baker, Chr	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
6	bbecker	Becker, Bo	O3111	Germany Head of Marketi	17	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
7	jblack	Black, Jack	D1103	Technical Architect	15	Active	Exempt	FT	40	ARCH	SD	Software Development	New Millenni
8	fbrown	Brown, Fri	L3211	Internal Audit Analyst	17	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
9	rbryant	Bryant, Ry	D9474	Software Developer	14	Active	Exempt	FT	40	SABM	SD	Software Development	New Millenni
10	mcampbel	Campbell,	D9844	Sr. Software Developer	16	Active	Exempt	FT	40	DEV	SD	Software Development	New Millenni
11	mchew	Chew, Mar	D9844	Sr. Software Developer	16	Active	Exempt	FT	40	SRACCT	SD	Software Development	New Millenni
12	kclark	Clark, Kati	D7763	Supervisor of Software De	17	Active	Exempt	FT	40	DEVSUP	SD	Software Development	New Millenni
13	jcoleman	Coleman, .	X1034	Sr. Director of Developme	23	Active	Exempt	FT	40	DIRDEV	SD	Software Development	New Millenni
14	rcollins	Collins, Ro	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
15	kcooper	Cooper, Ke	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
16	tcox	Cox, Ted	D9474	Software Developer	14	Active	Exempt	FT	40	DBA	SD	Software Development	New Millenni
17	scrawford	Crawford,	D9474	Software Developer	14	Active	Exempt	FT	40	BMBM	SD	Software Development	New Millenni
18	adepaz	DePaz, Ant	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
19	sdew	Dew, Stuar	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
20	rdiau	Diau, Rach	O4953	Personal Assistant	17	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
21	adiouf	Diouf, Adil	O2913	Codification 3	15	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni

Employee Compensation Letter

The Employee Compensation Letter provides a statement for the employee of their approved compensation awards. The letter is personalized to the employee and is configurable to include key elements for communication of compensation to the employee. This report is available only after the planning process and final CEO approval is completed. You can create a single letter or one for your entire team by selecting "All Direct Reports" or an individual from the Population selector. The output format for this report is a PDF file. Taleo Compensation is configurable and the contents of the letter in your zone may vary.

Managers can print out the letters for each direct report and present the letters prior to any salary adjustments appearing on the next payroll. The download feature of the letter may be especially convenient for managers with direct reports in other locations. You can run the letter for employees and save it in a PDF format. The letter can then be sent as an email attachment to notify employees of the salary adjustment.

Employee Compensation Letter

Achieve It!

January 1, 1999

Dea Jonathan,

New Millenium Corporation values your contributions to the organization and has developed compensation plans that reflect your individual performance and your contribution to the businesses overall success. The below information details your new compensation, i.e., salary increase(s), bonus and equity, based on calendar year 2009.

Sincerely,

Dave Garcia III

Your 2010 Compensation Statement

Jonathan Coleman

Performance Rating:	2
Current Annual Salary:	87,457.93 CAD
Merit Increase:	0.00 CAD
Adjustment Increase:	0.00 CAD
Promotion Increase:	0.00 CAD
New Annual Salary:	87,457.93 CAD
Lump Sum:	0.00 CAD
Bonus 1	11,669.22 CAD
Bonus 2	0.00 CAD
Stock Amount:	0.00 CAD

Thank you for your contributions to New Millenium this year. We look forward to another successful year.

HR Employee Data Export 1

The HR Employee Data Export 1 provides complete compensation planning amounts for each employee record maintained in the system, including employee identifying and planning data. Users with the HR Admin role can run this report based on the entire population of employees they have access to (e.g. the population selector value All Employee returns report data for all the employees the HR Admin has permission to view. The output format for this report is a CSV file suitable for import to the client system of record to contain all approved awards and increases. Taleo Compensation is configurable and the reports in your system may vary. The Baseline configuration for this report layout is detailed in the following table and example:

Filter by (Population)	First Sort	Second Sort
All Employees	Employee	Employee
Employees Without Direct Reports	Company	Company
Direct Reports Only	Title	Title
	Hire Date	Hire Date
	Annual Salary	Annual Salary

HR Employee Data Export 1

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ERP ID	Full Name	Job Code	Job Title	Salary Grade	Employee	FSLA Status	Full/Part T	Standard	Business Unit	Dept Code	Dept Name	Company Na
2	radams	Adams, Re	D9474	Software Developer	14	Active	Exempt	FT	40	DIRBM	SD	Software Development	New Millenni
3	yalaoui	Alaoui, Yo	O2911	Codification 1	15	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
4	mantilou	Antilou, M	D9844	Sr. Software Developer	16	Active	Exempt	FT	40	ARCH	SD	Software Development	New Millenni
5	cbaker	Baker, Chr	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
6	bbecker	Becker, Bo	O3111	Germany Head of Marketi	17	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
7	jblack	Black, Jack	D1103	Technical Architect	15	Active	Exempt	FT	40	ARCH	SD	Software Development	New Millenni
8	fbrown	Brown, Fri	L3211	Internal Audit Analyst	17	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
9	rbryant	Bryant, Ry	D9474	Software Developer	14	Active	Exempt	FT	40	SABM	SD	Software Development	New Millenni
10	mcampbel	Campbell,	D9844	Sr. Software Developer	16	Active	Exempt	FT	40	DEV	SD	Software Development	New Millenni
11	mchew	Chew, Mar	D9844	Sr. Software Developer	16	Active	Exempt	FT	40	SRACCT	SD	Software Development	New Millenni
12	kclark	Clark, Kati	D7763	Supervisor of Software De	17	Active	Exempt	FT	40	DEVSUP	SD	Software Development	New Millenni
13	jcoleman	Coleman, .	X1034	Sr. Director of Developme	23	Active	Exempt	FT	40	DIRDEV	SD	Software Development	New Millenni
14	rcollins	Collins, Ro	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
15	kcooper	Cooper, Ke	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
16	tcox	Cox, Ted	D9474	Software Developer	14	Active	Exempt	FT	40	DBA	SD	Software Development	New Millenni
17	scrawford	Crawford,	D9474	Software Developer	14	Active	Exempt	FT	40	BMBM	SD	Software Development	New Millenni
18	adepaz	DePaz, Ant	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
19	sdew	Dew, Stuar	D9474	Software Developer	14	Active	Exempt	FT	40	DEV1	SD	Software Development	New Millenni
20	rdiau	Diau, Rach	O4953	Personal Assistant	17	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni
21	adiouf	Diouf, Adil	O2913	Codification 3	15	Active	Exempt	FT	40	OPER	OP	Operations	New Millenni

HR Employee Data Export 2

The HR Employee Data Export 2 report consists of a data extract that includes a second view of employee data. The report format is similar to HR Employee Data Export 1, but amounts are displayed in local currencies. Users with the HR Admin role can run this report based on the entire population of employees they have access to (e.g. the population selector value All Employee returns report data for all the employees the HR Admin has permission to view. The output format for this report is a CSV file suitable for import to the client system of record to contain all approved awards and increases. Taleo Compensation is configurable and the reports in your system may vary.

HR Audit Report

The HR Audit Report provides an audit log of all data changes taken in the system. The output format for this report is a CSV file suitable for import to the client system of record to contain all approved awards and increases. Taleo Compensation is configurable and the reports in your system may vary. The Baseline configuration for this report layout is detailed in the following table and example:

Filter by (Population)	First Sort	Second Sort
All Changes	Employee	Employee

Filter by (Population)	First Sort	Second Sort
	Manager	Manager
	Update Date	Update Date

HR Audit Report

	A	B	C	D	E	F	G	H	I	J	K	L
1	Audit_ID	Date / Time	Employee	Employee Nam	User ID	User Name	Pay Type	Field	Table	Variable_Name	Old Value	New Value
2	86	2/3/2011 5:58	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Amount	employeeData	EA_Amount_1	4369.3245	5243.1894
3	88	2/3/2011 5:58	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Target	employeeData	EA_Target_1	5	6
4	87	2/3/2011 5:58	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Amount	employeeData	EA_Amount_5	4369.3245	5243.1894
5	89	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_End	employeeData	EA_End_1	12/31/2010	12/30/2010
6	90	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Salary	employeeData	EA_Salary_1	87386.49	87387.217
7	91	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Plan	employeeData	EA_Plan_1	MBP	MBP1
8	92	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Factor	employeeData	EA_Factor_1	1	0.99452
9	95	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Start	employeeData	EA_Start_1	1/1/2010	1/2/2010
10	94	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Amount	employeeData	EA_Amount_5	5243.1894	5214.5001
11	93	2/3/2011 5:59	2414	Ablis, Arthur	2690	Tonelli, Sylvio		EA_Amount	employeeData	EA_Amount_1	5243.1894	5214.5001
12	108	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Promotion	percent	employeeBasepay	BA_Promotion_	0	4
13	105	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Adjustmen	percent	employeeBasepay	BA_Adjustment_	0	6
14	106	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Adjustmen	proratedAmou	employeeBasepay	BA_Adjustment_	0	5243.233
15	101	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Merit	proratedAmou	employeeBasepay	BA_Merit_Amt_	0	2621.6165
16	100	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio		New_Job_Title	employeeData	New_Job_Title	0	7
17	98	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Other	percent	employeeBasepay	BA_Other_Pct	0	5
18	102	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Merit	percent	employeeBasepay	BA_Merit_Pct	0	3
19	103	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Merit	amount	employeeBasepay	BA_Merit_Amt	0	2621.6165
20	107	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Promotion	amount	employeeBasepay	BA_Promotion_	0	3495.4887
21	96	2/3/2011 6:02	2414	Ablis, Arthur	2690	Tonelli, Sylvio	Other	amount	employeeBasepay	BA_Other_Amt	0	4369.3608

Out of Guidelines Report

The Out of Guidelines report consists of base pay and bonus amounts that are out of system guidelines. It includes the employee planned for, manager, amount, percent and guideline. Taleo Compensation is configurable and the reports in your system may vary.

Custom Reports

Custom reports can be added to the standard reporting feature at additional cost by contacting Customer Support.

Custom reports require development work, but can include graphs, charts, subtotals and totals. They can include data by employee (based on employee detail) and/or summations by manager. When available custom reports display at the bottom of the Reports page below the Standard reports.