Taleo Enterprise

Taleo Compensation

Stand Alone HR Administrator Guide

Feature Pack 12B
August 31, 2012
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Revision History

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Modification</th>
<th>Revised Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 31, 2011</td>
<td>Initial version.</td>
<td></td>
</tr>
</tbody>
</table>
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

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Login and Product Access

Access Taleo Compensation (standalone version) through designated URL's. Separate login credentials are assigned for each user. Use the Customer Login page to authenticate and sign into the application.

What You Need to Get Started

When logging into the system for the first time, you will need three things:

1. The randomly generated password sent to you in an email.
2. Your user name.
3. Your email address.

Once your credentials are entered and accepted supply a new password, security question, and security answer before you begin compensation planning.

Password Requirements

As of Taleo Compensation Feature Pack 12B the login password requirements are upgraded to be as follows:

- Must include at least 8 or more characters.
- Mixed case (upper and lower) alphabetic characters.
- At least one non-alphabetic character.
Logging In

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

Taleo Enterprise URL > Customer Login

Steps
1. Enter your user name and password.
   If this is the first login, enter your temporary password, employee ID, and email address.
2. Click Submit.

Result
You now have access to the application.

Next Step
If logging in for the first time, perform the following tasks:
1. Select a new password.
2. Set a security question and answer on the My Info page.
Changing Your Password and Security Question

Prerequisite
You must log in with a valid user name and password.

Taleo URL > Customer Login > Log into Taleo Compensation

Steps
1. Click My Info.
2. Enter and confirm a new password.
   - Your password must have 8 or more characters, include mixed case alphabetic characters, and must contain at least 1 non-alphabetic character. Your password is case sensitive; your user name and answer to the security question are not.
3. Click Save.
5. Select a Security Question from the drop-down.
6. Enter an answer.
   - This is the answer you must provide to retrieve a forgotten password.
7. Click Save.

Result
Your password is changed to one of your choosing. Your security question and answer are set up, enabling you to use the I Forgot My Password function on the Customer Login page.
Using the I Forgot My Password Link

In the event an authorized user forgets his or her password, a link is provided on the Customer Login page that assists in access to Taleo Compensation.

**Prerequisite**

You must have a valid username, email address, and security question and answer in your user profile.

**Taleo URL > Customer Login**

**Steps**

1. Click "I forgot my password".
2. Enter your username.
3. Click Submit.

**Result**

If the request comes from 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.
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.

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

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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.

<table>
<thead>
<tr>
<th>UI Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar button</td>
<td>Opens a Calculator widget, enabling user to select a date displayed in the proper format for the active field.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Discards the changes on the active pane, section, or window.</td>
</tr>
<tr>
<td>Calculator button</td>
<td>Opens a Calculator widget, enabling user to create an equation. (e.g. Eligibility, Proration, Basepay or Bonus calculator).</td>
</tr>
<tr>
<td>Clear</td>
<td>Removes entries from a page, section or field and reverts to blank.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies the item selected in the adjacent drop-down.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the selected object (e.g. a field, plan or file)</td>
</tr>
<tr>
<td>Download</td>
<td>Downloads the selected item, usually a file, to a local directory.</td>
</tr>
<tr>
<td>Get Report</td>
<td>Retrieves a log report for the current transaction type.</td>
</tr>
<tr>
<td>Preview</td>
<td>Previews the item selected in the adjacent drop-down.</td>
</tr>
<tr>
<td>Run Report</td>
<td>Runs the selected report.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the changes on the active pane, section, or window.</td>
</tr>
<tr>
<td>Search</td>
<td>Executes a search for the desired data using the active criteria.</td>
</tr>
<tr>
<td>Select</td>
<td>Refreshes the current screen to reflect the item selected within the adjacent drop-down.</td>
</tr>
<tr>
<td>Upload</td>
<td>Uploads the selected object, usually a file and usually to the database.</td>
</tr>
<tr>
<td></td>
<td>Expands or collapses a section on a page.</td>
</tr>
<tr>
<td></td>
<td>Moves up the management hierarchy in a team or manager view grid.</td>
</tr>
</tbody>
</table>
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.
• Member Search............................................................................................................... 16
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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.

<table>
<thead>
<tr>
<th>Roll Bar Tab or Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Pay</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Current Base Pay - provides the selected employee's current salary, job and grade information.</td>
</tr>
<tr>
<td></td>
<td>• Proposed Annual Increases - provides the ability to make recommendations for base pay adjustments.</td>
</tr>
<tr>
<td></td>
<td>• New Base Pay - provides the same information as Current Base Pay, including any increases awarded and the relative results.</td>
</tr>
<tr>
<td></td>
<td>The Proposed Annual Increases panel includes these features:</td>
</tr>
<tr>
<td></td>
<td>• Supports plan types such as Merit, Lump Sum, Promotion and Adjustment.</td>
</tr>
<tr>
<td></td>
<td>• Enter increases using the same editable fields as in the Direct Team View: adjustment Percent and Amount (fields cross calculate).</td>
</tr>
<tr>
<td>Roll Bar Tab or Link</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| • 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**

<table>
<thead>
<tr>
<th>Panel and Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager and Base Pay Data Override &gt; Manager Override</td>
<td>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.</td>
</tr>
<tr>
<td>Panel and Section</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **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 a 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.

<table>
<thead>
<tr>
<th>Column or Label</th>
<th>Description</th>
<th>Editable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency Selector</td>
<td>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.</td>
<td>Choose Selection</td>
</tr>
<tr>
<td>Manager Name</td>
<td>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.</td>
<td>No</td>
</tr>
</tbody>
</table>
### Column or Label

<table>
<thead>
<tr>
<th>Column or Label</th>
<th>Description</th>
<th>Editable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Done Ratio</td>
<td>Indicates the number of employee planning records that are completed against the total number of employees for the manager's entire organization.</td>
<td>No</td>
</tr>
<tr>
<td>Submit Date</td>
<td>Displays the date when the manager submitted their compensation planning. Once submitted all views are rendered view only to the submitting manager.</td>
<td>No</td>
</tr>
<tr>
<td>Undo Submit</td>
<td>Once submitted, the submitting manager can no longer make changes unless the next higher manager clicks the &quot;Undo Submit&quot; 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.</td>
<td>Yes</td>
</tr>
<tr>
<td>Base Pay, Bonus or Stock</td>
<td>Budget or Target, Allocated and Available amounts are displayed for the applicable compensation plans.</td>
<td>No</td>
</tr>
<tr>
<td>Direct Team</td>
<td>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.</td>
<td>No</td>
</tr>
<tr>
<td>Totals</td>
<td>The Totals line represents the sum of the direct reporting managers' entire organization plus the Manager's own direct team.</td>
<td>No</td>
</tr>
<tr>
<td>Save</td>
<td>Allows the user to save changes, but does not submit the changes to the next level in the hierarchy.</td>
<td>No</td>
</tr>
<tr>
<td>Submit</td>
<td>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.</td>
<td>No</td>
</tr>
</tbody>
</table>

### 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 ...........................................

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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.

   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:

<table>
<thead>
<tr>
<th>Filter by (Population)</th>
<th>First Sort</th>
<th>Second Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Managers</td>
<td>Manager Name</td>
<td>Number of Employees</td>
</tr>
<tr>
<td>Direct Reporting Managers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Non Direct Reporting Managers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Team Only</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Focal Recommendations Analysis

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

<table>
<thead>
<tr>
<th>MANAGER NAME</th>
<th>Budget</th>
<th>RECI ($)</th>
<th>REC AVG %</th>
<th>Bonus 1 Budget</th>
<th>RECI ($)</th>
<th>REC AVG %</th>
<th>Bonus 2 Budget</th>
<th>RECI ($)</th>
<th>REC AVG %</th>
<th>ALLOC %</th>
<th>BUDGET</th>
<th>RECOMMEND</th>
<th>AVAILABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coleman, Jonathan</td>
<td>5,575</td>
<td>5,000</td>
<td>9.00%</td>
<td>1,500</td>
<td>0.00%</td>
<td>1,000</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>30.00%</td>
<td>9,150</td>
<td>5,982</td>
</tr>
<tr>
<td>Howard, Julia</td>
<td>33,730</td>
<td>6,000</td>
<td>9.00%</td>
<td>5,000</td>
<td>0.00%</td>
<td>20,000</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>37</td>
<td>2.70%</td>
<td>43,990</td>
<td>27,680</td>
</tr>
<tr>
<td>Steenerson, Henry</td>
<td>5,500</td>
<td>0.00%</td>
<td>100</td>
<td>0.00%</td>
<td>100</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0.00%</td>
<td>750</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>Washington, Rose</td>
<td>24,689</td>
<td>448</td>
<td>1.00%</td>
<td>3,674</td>
<td>0.00%</td>
<td>3,674</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>30</td>
<td>3.30%</td>
<td>32,816</td>
<td>448</td>
</tr>
</tbody>
</table>

Total: 11,342 | 3.70% | 20,000 | 0.00% | 0 | 0 | 79 | 54 | 40 | 100.00% | 79,239 | 40,694 | 25,397 |

<table>
<thead>
<tr>
<th>MANAGER NAME</th>
<th>RECI ($)</th>
<th>REC AVG %</th>
<th>BUDGET</th>
<th>RECOMMEND</th>
<th>AVAILABLE</th>
</tr>
</thead>
<tbody>
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<td>9.00%</td>
<td>100.00%</td>
<td>79,239</td>
</tr>
<tr>
<td>Howard, Julia</td>
<td>33,730</td>
<td>6,000</td>
<td>9.00%</td>
<td>100.00%</td>
<td>43,990</td>
</tr>
<tr>
<td>Steenerson, Henry</td>
<td>5,500</td>
<td>0.00%</td>
<td>100</td>
<td>100.00%</td>
<td>750</td>
</tr>
<tr>
<td>Washington, Rose</td>
<td>24,689</td>
<td>448</td>
<td>1.00%</td>
<td>100.00%</td>
<td>32,816</td>
</tr>
</tbody>
</table>

Total: 64 | 83 | 91.81% | 778,931 | 8.57% | 84 | 90 | 92.22% | 1,358,677 | 778,931 | 578,999 |
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:

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<tr>
<th>Filter by (Population)</th>
<th>First Sort</th>
<th>Second Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Employees</td>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Employees Without Direct Reports</td>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>Direct Reports Only</td>
<td>Currency</td>
<td>Currency</td>
</tr>
<tr>
<td></td>
<td>Current Base Pay</td>
<td>Current Base Pay</td>
</tr>
<tr>
<td></td>
<td>New Base Pay</td>
<td>New Base Pay</td>
</tr>
</tbody>
</table>

### Employee Compensation Report

<table>
<thead>
<tr>
<th>Roll Name</th>
<th>First Name</th>
<th>Last Name</th>
<th>Position</th>
<th>Direct Reports Only</th>
<th>Base Pay</th>
<th>New Base Pay</th>
<th>Baseline Base Pay</th>
<th>Baseline New Pay</th>
<th>Bonus Amt</th>
<th>Bonus Percent</th>
<th>Saves</th>
<th>Saves Percent</th>
<th>Planned Amt</th>
<th>Planned Percent</th>
<th>Percentage</th>
<th>Percentage</th>
<th>Goal Amt</th>
<th>Goal Percent</th>
<th>Budget Amt</th>
<th>Budget Percent</th>
<th>Variation</th>
<th>Variation</th>
</tr>
</thead>
<tbody>
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<td>Adam</td>
<td>Michael</td>
<td>Smith</td>
<td>Engineer</td>
<td>True</td>
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<td>70,000</td>
<td>60,000</td>
<td>70,000</td>
<td>5,000</td>
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<td>80%</td>
<td>0.05</td>
<td>65,000</td>
<td>0.02</td>
<td>0.00</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Andrew</td>
<td>Jane</td>
<td>Johnson</td>
<td>Manager</td>
<td>False</td>
<td>50,000</td>
<td>60,000</td>
<td>50,000</td>
<td>60,000</td>
<td>4,000</td>
<td>0.01</td>
<td>70%</td>
<td>0.04</td>
<td>56,000</td>
<td>0.03</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brian</td>
<td>Lisa</td>
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<td>Analyst</td>
<td>True</td>
<td>45,000</td>
<td>55,000</td>
<td>45,000</td>
<td>55,000</td>
<td>3,000</td>
<td>0.01</td>
<td>65%</td>
<td>0.03</td>
<td>52,000</td>
<td>0.02</td>
<td>0.00</td>
<td></td>
<td></td>
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</tr>
<tr>
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<td>50,000</td>
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<td>70%</td>
<td>0.04</td>
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</tr>
<tr>
<td>David</td>
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<td>Engineer</td>
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<td>55,000</td>
<td>45,000</td>
<td>55,000</td>
<td>3,000</td>
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</tr>
<tr>
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<td>50,000</td>
<td>2,000</td>
<td>0.01</td>
<td>70%</td>
<td>0.04</td>
<td>46,000</td>
<td>0.03</td>
<td>0.00</td>
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</tr>
<tr>
<td>Frank</td>
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<td>Manager</td>
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<td>55,000</td>
<td>45,000</td>
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<td>3,000</td>
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<td>65%</td>
<td>0.03</td>
<td>52,000</td>
<td>0.02</td>
<td>0.00</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Employee Data Export

The Employee Data 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:

<table>
<thead>
<tr>
<th>Filter by (Population)</th>
<th>First Sort</th>
<th>Second Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Employees</td>
<td>Employee Name</td>
<td>Employee Name</td>
</tr>
<tr>
<td>Employees Without Direct Reports</td>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Direct Reports Only</td>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td>Hire Date</td>
<td>Hire Date</td>
</tr>
<tr>
<td></td>
<td>Annual Salary</td>
<td>Annual Salary</td>
</tr>
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</table>

### Employee Data Export

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>ESP ID</td>
<td>Full Name</td>
<td>Job Code</td>
<td>Job Title</td>
<td>Salary Grade</td>
<td>Employee</td>
<td>PSEA Status</td>
<td>Full/Part</td>
<td>Standard Business Unit</td>
<td>Dept</td>
<td>Code</td>
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<td>2</td>
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<td>Adams, Re</td>
<td>061144</td>
<td>Software Developer</td>
<td>14 Active Exempt FT</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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
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:
HR Employee Data Export 1

The HR Employee Data Export 1 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 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:
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.