



# PeopleSoft 8.00.01 Human Resources PeopleBook

**Planning Salaries**

PeopleSoft 8.00.01 Human Resources PeopleBook: Planning Salaries

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## PLANNING SALARIES

This book provides the information you need for implementing and using the Planning Salaries module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAHRCr8SP1B 1200.

Overview of Salary Planning introduces the functionality and methods that you can use to set up salary structures, review employees, and administer salaries with salary increase budgets and plans.

Setting Up Salary Plans, Grades, and Steps describes how to set up salary structures.

Administering Salary Plans, Grades, and Steps describes how to use the salary structures to administer salaries in your organization.

Reviewing Employee Performance describes how to set up employee review rating scales, conduct employee reviews, and view review results.

Budgeting and Planning Salary Increases describes how to set up salary increase budgets, use them to plan salary increases, and load approved salary increases to employee compensation records.

Processing Mass Salary Increases describes the salary mass update processes you can run to update salaries for your entire organization by rate code, job code, or salary plan/pay group.

Viewing Summary Salary Data describes the inquiry pages that provide online data useful in making salary-planning decisions.

Reporting Salary Data describes the reports you can generate using employee salary data.



## CHAPTER 1

# Overview of Salary Planning

The PeopleSoft Human Resources Salary Planning module provides the following features and functionality:

- A system for setting up and implementing salary structures called salary administration plans.
- A system for budgeting and planning salary increases by group.
- A system for reviewing employee performance and relating the performance review to salary increases.
- Processes for updating salaries with a variety of parameters.
- Inquiry pages for viewing salary structures and historical salary data.
- Reports for viewing salary structures and historical salary data.

This chapter briefly introduces these areas of functionality.

## Terms and Definitions

Because PeopleSoft Human Resources Salary Planning provides a variety of methods for planning and administering salaries, it is important to recognize the distinction between types of salary plans.

**Salary Administration Plan** A plan of salary defaults, grades, and step components.

**Salary Increase Plan** A plan for increasing the salaries of individual employees in a group. The salary increase plan is always based on a group salary increase budget.

**Salary Plan** When used without further qualification, this term generally refers to a salary administration plan.

In the *Budgeting and Planning Salary Increases* chapter of this documentation, salary increase plans are sometimes referred to as salary plans.

## Setting Up and Administering Salary Administration Plans

Using PeopleSoft Planning Salaries, you can create salary administration plans with grades and steps. Use the salary administration plans to assign default compensation packages to employees at the location, job code, or employee level. You can also use these salary plans to move employees through step increases manually or automatically.

---

### Basic Salary Administration Plan Process

The following is a list of the basic procedures for setting up and administering salary administration plans.

To set up and administer salary administration plans:

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



For more information about setting up salary administration plans, see *Setting Up Salary Plans, Grades, and Steps*. For more information about administering salaries with salary administration plans, see *Administering Salary Plans, Grades, and Steps*.

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### Integration of Salary Administration Plans With Other Salary Planning Business Processes

You can use the salary administration plan to assign a default compensation package to an employee. After assigning employees to salary plans, grades, or steps, you can modify their compensation using any of the other methods of planning and implementing salary increases that are available in the Planning Salaries module, including the following:

- Modify an employee's compensation package manually on the Compensation page.
- Run the Automatic Step Increase process if you set up step components in the salary plan.
- Tie salary increases to the employee's performance review.
- Create a group salary increase budget and plan, and load the mass increases to the job records.
- Run one of the mass salary update processes to process salary changes across your organization based on percent, pay group, or job code.

## Setting Up and Administering Employee Review

You can conduct salary reviews or performance reviews for your employees. The following are some of the options available in setting up and administering employee review:

- Set up groups of employees and define the review criteria and method of calculating review results for the group.
- Conduct reviews by a team of reviewers, and weight each reviewer's rating.
- Predetermine the review result distribution, view the actual result distribution, and adjust results if necessary.
- Use the review results to administer salary increases in different ways depending upon the rating scale you use to review the employee.
- Update the employee's career plan to reflect goal achievements if the review includes goals from a career plan.
- View the review results and review history in inquiry pages and reports.

---

### Basic Employee Review Process

To set up and administer employee review:

1. Set up Employee Review tables.  
Define competencies, a rating model, a merit scale (optional), review bands (optional) and a review rating scale.
2. (Optional) Set up a Review Result Distribution.
3. Conduct the employee review.
4. (Optional) View and adjust the Review Result Distribution.
5. Process review results to the employee's job data record if the rating scale type is Summation.
6. View review results and generate reports.



For more information about setting up and administering employee review, see [Reviewing Employee Performance](#).

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## Integration of Employee Review With Other Salary Planning Business Processes

How the employee's review result integrates with other salary planning business processes depends upon the business processes that you use and their variations.

- The system updates the employee's review results in the Job Data record.
- The employee's review information is available in the Salary (Increase) Planning by Group pages, where you can refer to it when adjusting employee increases.
- If you use an Average rating scale to review employees who have a salary increase matrix associated with their salary administration plan, the system validates proposed salary increases against your salary increase matrix.
- If you use a Summation rating scale to review employees, you can define the method of resolving the review results into a salary increase and use an automated process to load the resulting increases to the employees' compensation packages.

## Setting Up and Administering Salary Increase Budgets and Plans

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

Create your salary increase plan by applying the budgeted increases to employees in the group. Manually adjust individual employee's raises based on compensation history and review results. You can check the variance between the budget totals and the salary plan totals, and approve the raises when you're satisfied. After approving raises, you can load them to the employees' job data records where they take effect on the effective date of the budget or the employee's anniversary date, depending upon how you defined the budget.

---

## Basic Budgeting and Planning Process

To budget and plan salary increases:

1. Create a salary increase group.
2. Set up defaults and controls for salary increase budgets and plans.
3. Create requested budgets, compare budgets, and optionally approve a budget.
4. Create a salary increase plan by applying budgeted increases to employee compensation and manually adjusting individual increases.

5. Approve the salary increase budget and plan.
6. Populate employee records with the approved increases.



For more information about setting up and administering salary increase budgets and plans, see *Budgeting and Planning Salary Increases*.

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## **Integration of Salary Increase Budgets and Plans With Other Salary Planning Business Processes**

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

## **Using Other Mass Salary Increase Processes to Update Salaries**

In the Plan Salaries Process menu you'll find the following three processes to implement salary mass updates.

- Update by Percent, Amount, or Points.
- Update by Salary Plan / Pay Group.
- Update by Job Code.

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



For more information about salary update processes, see *Budgeting and Planning Salary Increases*.

---

## **Viewing Summary Data and Reports**

PeopleSoft Human Resources salary planning inquiry pages and reports provide the following types of summary information:

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



For more information about inquiry pages, see [Viewing Summary Salary Data](#).  
For more information about reports, see [Reporting Salary Data](#).

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## Before You Begin

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



For more information about the control tables in PeopleSoft Human Resources, see [Setting Up Control Tables](#). For more information about entering employee job data, see [Hiring Your Workforce](#).

---

The following are some optional setup steps to consider:

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

## CHAPTER 2

# Setting Up Salary Plans, Grades, and Steps

You can set up salary plans with grades only, or with grades and steps. If your organization uses salary increase matrix guidelines to administer salaries, you can set up a matrix to use as a reference. You can also associate a review rating scale with salary grades.

## Overview of Setting Up Salary Plans

You define your salary plans, grades, and steps on a series of control tables. At each level you define parameters such as review rating scale and currency that the system enters as default information at the next level. This overview section introduces you to the setup steps, reviews the structure of salary plans, and explains how the system manages the defaulting and conversion of currency in salary plans, grades, and steps.

---

### Overview of the Setup Steps

Depending upon how your organization defines its salary structures, you follow some or all of the following steps to set up your salary plans:

To set up salary plans/grades/steps:

1. Set up a rating model on the Rating Model Table.
2. Set up a review rating scale on the Rating Scale Table.



For more information about setting up rating models and rating scales, see Setting Up Employee Review Tables.

---

3. (Optional) Set up salary increase matrix guidelines on the Salary Increase Matrix Table page.
4. Define each salary plan with a unique ID on the Salary Plan Table page.
  - You define the standard hours and frequency annualization factors for the plan. These do not change at the salary grade level.

- You define a default salary matrix scale, review rating scale, and currency, which you can change at the salary grade level.
  - (German users) Enter tariff information for the salary plan.
5. Assign a series of salary grades to the salary plan on the Salary Grade Table page.
  6. (Optional) For each salary grade, set up salary steps with pay components and their compensation values and currency on the Salary Step Components page.
  7. (Optional) Set up labor agreement categorization defaults on the Categorization Defaults page.

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

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## Understanding Salary Plan Structure

You set up each salary plan with a unique ID. The series of grades within all salary plans have the same IDs, for example grades 001 - 010. Similarly, the steps within grades have the same IDs, for example steps 1 - 10. So your various salary plans are similar in terms of structure. But for each plan you establish different monetary value for the grade ranges as well as different pay components, amounts, percents, and salary points for the salary steps. In this way you create unique plans with similar structures, but with different compensation.

You then establish default compensation packages by tying the unique salary plans to different locations, job codes, or individual employees. This defaulting eases your administrative burden both at hire and when an employee has a job change. To illustrate how this works, assume you hire an employee into a particular grade and step at one location, then transfer the employee to another location. When you enter the location change, the system automatically assigns the salary plan of the new location to the employee. The new salary plan brings with it the same grade and step structure, but with the compensation appropriate to the new location.

---

## Understanding Currency Defaulting and Conversion in Salary Plans

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

The system uses the currency code specified for the organization as the default currency for the salary plan. The system uses the currency code specified for the salary plan as the default for all salary grades in the plan. It uses the currency code specified for the salary grade as the default for all steps within the grade. It uses the currency code specified on the Comp Rate Code table as the default currency for the rate codes assigned to the step.

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

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

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



For more information about using multiple currencies, see Working with Currencies.

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## **Enterprise Integration Points (EIP) Related to Salary Structures**

When you add, delete, or change information in salary structure records, the system automatically publishes the Salary Plan, Salary Structure, and Salary Structure WFA EIP messages to any other PeopleSoft or third-party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component, page, or PeopleSoft batch process is the source of the update to the salary structure records.



For more information about the subscribers and technical details of the Salary Plan EIP and Salary Structure EIP, see Salary Plan, Salary Structure, or Salary Structure WFA. For more information about PeopleSoft Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook

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## Setting Up Salary Increase Guidelines

Use the Salary Increase Matrix page to establish the minimum and maximum percentage increases permitted for each review rating by position in the range of quartiles across the grade. This is an optional setup table. You only use this table if you use matrix guidelines in your organization to plan salary increases. After you've set up the initial matrix, you can refer to it when administering individual salary increases and when creating salary increase budgets and plans.

The system ties the data in this matrix to salary increase plans and employee Pay Rate Change pages. It determines where an employee falls in the range by taking salary minus the minimum divided by the spread. For example, an employee who has a salary of \$26,000 in a range of \$25,000–\$30,000 for the salary grade would fall into the first quartile.  $(26,000 - 25,000 / 5,000 = 1/5, \text{ or } .20, \text{ which is in the first quartile.})$  When the system indicates that an amount is out of range, you can refer to the matrix to see the overall structure of percentage increase guidelines and make any necessary adjustments.

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### Enterprise Integration Points (EIP) Related to the Salary Matrix Table

When you add, delete, or change information in the Salary Matrix records, the system automatically publishes the Salary Matrix EIP message to any other PeopleSoft or third-party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the Salary Matrix records.



For more information about the subscribers and technical details of the Salary Matrix EIP, see Salary Matrix. For more information about PeopleSoft Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

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### Salary Increase Matrix Table Page

Usage	Use the Salary Increase Matrix page to establish the minimum and maximum percentage increases permitted for each review rating by position in range.
Object Name	SALARY_MATRIX_TBL
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Salary Increase Matrix Table, Salary Increase Matrix Table</b></li> <li>• <b>Administer Workforce, Administer Workforce (USF), Setup, Salary Increase Matrix Table, Salary Increase Matrix Table</b></li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Salary Increase Matrix Table, Salary Increase Matrix Table</b></li> </ul>
Prerequisites	None
Access Requirements	Enter a SetID and Salary Matrix Code.

Salary Increase Matrix Table

**SetID:** SHARE      **Salary Matrix Code:** KCEX

---

**Rating Scale** View All    First 1 of 1 Last

\*Effective Date: 01/01/1994      \*Status: Active + -

\*Description: Exempt Salary Ranges      Short Description: Exempt

\*Rating Scale: KC01      Model:

---

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

*Review Rating	Below Min		1st Quartile		2nd Quartile		3rd Quartile		4th Quartile		
	Min%	Max %	Min%	Max %	Min%	Max %	Min%	Max %	Min%	Max %	
1	8.0	15.0	9.0	13.0	7.0	10.0	5.0	8.0	3.0	6.0	+ -
2	6.0	12.0	7.0	10.0	5.0	8.0	3.0	6.0	1.0	5.0	+ -
3	5.0	9.0	4.0	7.0	3.0	5.0	2.0	4.0	0.0	3.0	+ -
4	0.0	3.0	0.0	2.5	0.0	2.0	0.0	1.0	0.0	0.0	+ -

Salary Increase Matrix Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, and **Short Description**.

**SetID**      The system displays the **SetID** you entered when you accessed the page.

**Salary Matrix Code**      The system displays the **Salary Matrix Code** you entered when you accessed the page.

**Rating Scale**

**Rating Scale**      Select a salary **Rating Scale** to associate with the matrix. Valid values are the rating scales you defined in the Rating Scale table. The rating scale you select must be an Average rating scale type.

**Model**      The system enters the rating **Model** you associated with the rating scale on the Rating Scale setup page.

**Salary Increase Matrix**

**Review Rating**      Select a **Review Rating** from the list of valid ratings in the rating model associated with the rating scale that you selected.

- Below Min** (below minimum) Enter a **Min %** (minimum percentage) and **Max %** (maximum percentage). The **Below Min** column of the matrix is optional. You do not have to enter minimum and maximum percentages if your organization does not permit salaries that are below the minimum for the salary grade.
- 1st Quartile** Enter a **Min %** and **Max %**.  
As a general rule, the higher the quartile and the lower the rating, the lower the percentage increase allowed.
- 2nd Quartile** Enter a **Min %** and **Max %**.
- 3rd Quartile** Enter a **Min %** and **Max %**.
- 4th Quartile** Enter a **Min %** and **Max %**.



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

## Defining Salary Plans

Use the Salary Plan Table pages to define a unique salary plan ID and the default values for grades and steps within the plan.

### Salary Plan Table Page

Usage	Use the Salary Plan Table to define the common characteristics of your salary plan. German users can use this page to associate a German tariff and tariff area with the salary plan.
Object Name	SALARY_PLAN_TABLE
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Salary Plan Table, Salary Plan Table</b></li> <li>• <b>Administer Workforce, Administer Workforce (USF), Setup, Salary Plan Table, Salary Plan Table</b></li> <li>• <b>Define Business Rules, Define Payroll Process (USF), Setup 1, Salary Plan Table, Salary Plan Table</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Salary Plan Table, Salary Plan Table</b></li> </ul>

Prerequisites	None
Access Requirements	Enter a SetID and a Salary Administration Plan.

Salary Plan Table

**SetID:** SHARE      **Salary Administration Plan:** KC01      [Business Units that use this Setid](#)

---

**Salary Plan** View All    First 1 of 1    Last

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

**\*Description:**

**Short Description:**

**\*Standard Hours:**       **Work Period:**   Weekly

**\*Currency Code:**   Canadian Dollar

**Default Salary Matrix Code:**   Non-Exempt Salary Guidelines

**Default Review Rating Scale:**

**Company:**   Global Business Institute

---

**Frequency Defaults**

**Hourly:**   Hourly      **Daily:**   Daily      **Monthly:**   Monthly

---

**Germany**

**Tariff:**

**Tariff Area:**

Salary Plan Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **SetID, Effective Date, Status, Description, and Short Description.**

### Salary Plan

#### Standard Hours

Enter the **Standard Hours** for this salary plan. The system will use this value in frequency conversions for comp rate codes defined with hourly frequency.

#### Work Period

Enter the standard **Work Period** in which the standard hours should be completed. The system will use this value in frequency conversions for comp rate codes defined with hourly frequency.

---

For more information about Standard Hours and Work Period, see PeopleSoft 8 Application Fundamentals for HRMS, "Setting Up Control Tables".

---

- Currency Code** Select the **Currency Code** for this salary plan. The default value is the base currency your organization uses, which you select on the Installation Table setup page.
- The system will use the currency code that you enter here as the default on the Salary Grade setup page.
- Default Salary Matrix Code** If you use salary increase guidelines matrices to plan salary increases, select a **Default Salary Matrix Code**. The system will enter this matrix code as the default for each grade in the salary plan.
- You establish salary matrix codes in the Salary Increase Matrix table. If you have not yet defined a Salary Matrix, you can enter this information later.
- Default Review Rating Scale** Once you select a default salary matrix code, the system populates the **Default Review Rating Scale** if you have linked it to the Salary Matrix Code on the Salary Matrix Table. You cannot change the **Default Review Rating Scale** here if it is linked to the salary matrix code.
- If you do not use salary matrices in your organization, select a **Default Review Rating Scale**. The review rating scale you select will appear as the default in the Salary Grade Table. You can override the default if necessary.
- If you have not yet defined a review rating scale, you can enter this information later.
- Company** Select a **Company** code if you want to associate this plan with a particular company in your organization. This value is for your reference only; no system processing is associated with it. You create valid codes on the Company Table page.
- Frequency Defaults**
- Hourly** Select a Frequency ID. The system uses the annualization factor of that Frequency ID when it calculates the daily, monthly, or annual rate for each component of pay that you assign to a Salary Step on the Salary Step Components page. The system stores the valid values in the Frequency table.
- Daily** Select a Frequency ID. The system uses the annualization factor of that Frequency ID when it calculates the hourly, monthly, or annual rate for each component of pay that you assign to a Salary Step on the Salary Step Components page. The system stores the valid values in the Frequency table.

**Monthly**

Select a Frequency ID. The system uses the annualization factor of that Frequency ID when it calculates the hourly, daily, or annual rate for each component of pay that you assign to a Salary Step on the Salary Step Components page. The system stores the valid values in the Frequency table.



For more information about frequency conversions of compensation rates, see [Setting Up and Using Frequencies](#).

---

**Germany Group Box**

German users associate a tariff and tariff area with the salary plan.

**Tariff**

Enter the **Tariff** associated with this salary plan.

**Tariff Area**

Enter the **Tariff Area** associated with this tariff and salary plan.



For more information about setting up tariff areas, see [Establishing German Tariff Areas](#).

---

**Defining Salary Grades and Steps**

Use the Salary Grade Tables pages to set up salary grades associated with a salary administration plan. Depending on how you structure your compensation plans you can set up salary grades only, or salary grades and salary step components. Salary grades define an appropriate salary range for an employee assigned to that grade. Step Components define the actual recommended pay rate by component for an employee assigned to that step.

When you set up salary ranges for a grade, you can tap several sources to determine equitable rates. You can review salary surveys comparing and contrasting pay practices at similar organizations, and consider special allowances, bonuses, cost-of-living adjustments, and executive perquisites. When you've determined an equitable range for the salary grade, use the Salary Grade Table to enter minimum, maximum, and midpoint rates. You can also associate default labor agreement employee categories and subcategories with salary grades.

For each salary grade you can establish salary step components. You can tie several rate codes to a salary step. Compensation for the rate codes you assign to the step can be based on a specific amount, percent, or salary points.

## Salary Grade Table Page

Usage	Use the Salary Grade table to specify the minimum, maximum, and midpoint rates for salary grades. You can set up several salary grades, in ascending or descending order, within the same salary administration plan. To create different ranges for the same salary grade, use separate salary administration plans for each.
Object Name	SALARY_GRADE_TBL1
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Salary Grade Tables, Salary Grade Table</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Salary Grade Tables, Salary Grade Table</b></li> </ul>
Prerequisites	Set up a Salary Administration Plan on the Salary Plan Table page.
Access Requirements	Enter a SetID, Salary Administration Plan, and Salary Grade.

Salary Grade Table    Categorization Defaults    Salary Step Components

**SetID:** DEU01      **Salary Administration Plan:** KD01 Metal Tariff Salary Plan  
**Salary Grade:** G1      **Standard Hours:** 40.00

**Salary Grade**      View All    First 1 of 1    Last

\*Effective Date: 01/01/1980      \*Status: Active      + -  
 \*Description: Grade 1 - White Collar      Short: G1  
 Salary Matrix Code:        
 Review Rating Scale: KD01      Germany Rating Scale  
 Currency Code: DEM      Mark      Range Spread: 30.0 %

	Minimum	Midpoint	Maximum
Annual	120,000.00	138,000.00	156,000.00
Monthly	10,000.00	11,500.00	13,000.00
Daily	461.54	530.77	600.00
Hourly	57.69	66.35	75.00

Salary Grade Tables - Salary Grade Table page

- SetID**      The system enters the **SetID** you entered when you accessed the page.
- Salary Administration Plan**      The system enters the salary plan you entered when you accessed the page.
- Salary Grade**      The system enters the Salary Grade ID you entered when you accessed the page.
- Standard Hours**      The system enters the **Standard Hours** you defined for the Salary Plan.

**Salary Grade****Effective Date**

The system enters the effective date of the Salary Plan as the default **Effective Date**. Change the date if required.

**Status**

Select the status of the salary grade.

**Description**

Enter a **Description** of the salary grade as you want it to appear in reports.

**Short (description)**

Enter a Short description of the salary grade.

**Salary Matrix Code**

If you selected a default salary matrix code on the Salary Plan Table page, the system enters that code as the default. You can override the default if necessary.

**Review Rating Scale**

If you selected a default salary matrix code on the Salary Plan Table setup page, the system enters the **Review Rating Scale** tied to the salary matrix. This default value is not available for change. The default **Salary Matrix Code** and **Review Rating Scale** will appear in the Job Data pages for employees in the job code using this salary grade.

If you do not use salary matrices in your organization but selected a default review rating scale on the Salary Plan Table setup page, the default appears in the **Review Rating Scale** field, which you can override if necessary.

**Currency Code**

The system displays the **Currency Code** you selected for the Salary Administration Plan on the Salary Plan Table setup page. You can change the currency code if necessary.

**Range Spread**

The system calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.

**Salary Ranges****Minimum**

Enter the minimum salary in either the **Annual, Monthly, Daily, or Hourly** row. You only have to enter the range in one frequency; the system calculates the minimum in the other frequencies.

**Midpoint**

The system calculates the midpoint as the maximum plus the minimum divided by two. If you want to use different midpoints from the ones the system calculates, you can type over them.

- Maximum** Enter the maximum salary in either the **Annual, Monthly, Daily, or Hourly** row. You only have to enter the range in one frequency; the system calculates the maximum in the other frequencies.
- Annual** Enter the annual salary range if that is how you quote the salary for this grade. Otherwise leave this row blank and the system will calculate the values for you.
- Monthly** Enter the monthly salary range if that is how you quote the salary for this grade. Otherwise leave this row blank and the system will calculate the values for you.
- Daily** Enter the daily salary range if that is how you quote the salary for this grade. Otherwise leave this row blank and the system will calculate the values for you.
- Hourly** Enter the hourly salary range if that is how you quote the salary for this grade. Otherwise leave this row blank and the system will calculate the values for you.



For more information about frequency conversions of compensation rates, see Setting Up and Using Frequencies.

### Categorization Defaults Page

Usage	Use the Categorization Defaults page to associate the salary grade with labor agreement categories and subcategories.
Object Name	SALARY_GRADE2_TBL
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Salary Grade Tables, Categorization Defaults</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Salary Grade Tables, Categorization Defaults</b></li> </ul>
Prerequisites	Define labor agreements, categories, and subcategories on the Employee Categorization page.
Access Requirements	Enter a SetID, Salary Administration Plan, and Salary Grade.

Salary Grade Table		Categorization Defaults		Salary Step Components	
<b>SetID:</b>	DEU01	<b>Salary Administration Plan:</b>	KD01 Metal Tariff Salary Plan		
<b>Salary Grade:</b>	G1	<b>Standard Hours:</b>	40.00		
<b>Labor Information</b> <span style="float: right;">View All First 1 of 1 Last</span>					
<b>Effective Date:</b>	01/01/1980	<b>Status:</b>	Active	<input type="button" value="+"/> <input type="button" value="-"/>	
<b>Description:</b>	Grade 1 - White Collar				
<b>Labor Agreement:</b>	<input type="text" value="KD01"/> <input type="button" value="Q"/>	General Agreement			
<b>Employee Category:</b>	<input type="text" value="002"/> <input type="button" value="Q"/>	White Collar Worker			
<b>Subcategory:</b>	<input type="text"/> <input type="button" value="Q"/>				
<b>Subcategory 2:</b>	<input type="text"/> <input type="button" value="Q"/>				

Salary Grade Tables - Categorization Defaults page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, and **Description**.

The system enters the same **SetID**, **Salary Administration Plan** and description, **Salary Grade**, and **Standard Hours** that appear on the Salary Grade Table page.

**Labor Information**

- Labor Agreement**                      Select a labor agreement from the valid values that you set up on the Employee Categorization page.
- Employee Category**                      Select the employee category from the available options.
- Subcategory**                              Select the employee subcategory from the available options.
- Subcategory 2**                              If necessary, select the subcategory 2 from the available options.



For more information about setting up categories, see Defining Employee Categories.

**Salary Step Components Page**

Usage	Use the Salary Step Components page to associate salary components with salary steps within a salary grade. The information you set up here will be used as default compensation data when your employees move into a specific step.
Object Name	SALARY_GRADE_T3GBL
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Salary Grade Tables, Salary Step Components</b></li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Salary Grade Tables, Salary Step Components</b></li> </ul>
Prerequisites	Set up a salary plan and salary grade.
Access Requirements	Enter a SetID, Salary Administration Plan, and Salary Grade.

Salary Grade Tables - Salary Step Components page



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

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, and Description.**

### Salary Grade

The system enters the same **SetID, Salary Administration Plan** and description, **Salary Grade,** and **Standard Hours** that appear on the Salary Grade Table page.

### Salary Grade

#### Incr Type (increment type)

If you plan to run a process that automatically moves an employee to the next salary step, select the increment type. The following are the valid values:

**(None):** Select this option if you do not want the system to use increments, or to clear values entered in error.

**Date Based:** Select this option if you want the system to move the employee into the next step based on the employee’s entry date into the step. If you select Date Based, the **Months to Next Step Increment** field becomes visible.

**Either:** Select this option if you plan to use Date Based and Hrs Based at the same time. If you select **Either**, the **Spec Accum** (special accumulator), **Months to Next Step Increment**, and **Hours to Next Step Increment** fields become visible.

**Hrs Based** (hours based): Select this option if you want the employee’s step increase to be based on a number of hours. If you select **Hrs Based**, the **Spec Accum** and **Hours to Next Step Increment** fields become visible.

**Manual:** Select this option if you want increments to only happen manually rather than being generated by the system.

**Weeks Based:** (This value is for US Federal government users only.)

**Spec Accum** (special accumulator)

If you selected an **Incr Type** of **Hrs Based** or **Either**, and you use PeopleSoft Payroll for North America, select a special accumulator from the list of valid values. You establish special accumulator values on the Special Accumulator table.

---

For more information about special accumulators, see PeopleSoft 8 Payroll for North America, “Defining Earnings and Using Earnings Codes”.

---

**Salary Step**

**Step**

If you are defining a new step, enter the step number. If you’re modifying a step, select the step number.

**Currency**

Select a currency code for the step. The system enters the currency code you entered on the Salary Grade table as the default value. You can change the currency code.

The system displays the compensation totals for the step on this page in the currency you specify here.

**Months to next Step Increment**

If you selected an **Incr Type** of **Date Based** or **Either**, enter the number of months that the employee must remain in this step before being eligible for the next step increment.

**Hours to next Step Increment**

If you selected an **Incr Type** of *Hrs Based* or *Either*, enter the number of hours that the employee must remain in this step before being eligible for the next step increment.

**Salary Components****Rate Code**

Select a **Rate Code** that you want to associate with this salary step. The valid values in the list are the base pay components you defined in the Comp Rate Code table.

The system automatically populates certain fields in the grid based on how you defined the rate code in the Comp Rate Code table.

**Seq (sequence)**

The system displays **0** as the default **Seq** number. To avoid duplicate keys for data rows, enter **1** or higher if you associate the same rate code with the same step more than once. The system issues a warning if you use the same rate code more than once with the same sequence number.

You would use the same rate code more than once to give the same rate code different compensation rates for the same step. This is useful for job splitting.

**Details**

Click the **Details** button to view details of the selected **Rate Code**.

**Comp Rate**

The system displays the default compensation rate that you defined for the rate code on the Rate Code table. If the rate code type is *Flat Amount*, *Hourly Rate*, or *Hourly Rate + Flat Amount*, enter the compensation rate you want to assign to the rate code for this salary step.

**Currency**

The system enters the default currency code that you defined for the rate code on the Rate Code table. You can change the rate code's currency code for this salary step.

---

For more information about currency conversions for salary step components, see *Understanding Currency Defaulting and Conversion in Salary Plans*.

---

**Frequency**

The system enters the default Frequency ID you defined for the rate code on the Comp Rate Code table. You can override that frequency here.

**Percent**

If the rate code type for this rate code is *Percent*, enter the percent you want to assign to the rate code for this salary step.

**Rate Code Group**

If you selected the Rate Code Groups check box on the Installation Table setup page, you can apply the rate code percent to a rate code group. To do so, select a rate code group from the list of valid values. You define rate code groups on the Rate Code Groups page.

This field is hidden if you did not select Rate Code Groups on the Installation table.

**Points**

If the rate code type for this rate code is *Points*, enter the number of points you want to assign to the rate code for this salary step. You set up the value of each point at the company level on the Company table.

This field is hidden if you did not select the Salary Points check box on the Installation table.

**Totals**

The system calculates and displays the total value of the pay components you assigned to the step. When you save the page, the system warns you if the total is outside the minimum or maximum ranges that you specified on the Salary Grade Table page.

**Hourly Rate**

The system displays the total hourly rate value of all the rate codes of the salary step in the currency of the salary step.

**Daily Rate**

The system displays the total daily rate value of all the rate codes of the salary step in the currency of the salary step.

**Monthly Rate**

The system displays the total monthly rate value of all the rate codes of the salary step in the currency of the salary step.

**Annual Rate**

The system displays the total annual rate value of all the rate codes of the salary step in the currency of the salary step.

**Salary Grade Tables - Salary Step Components: Rate Code Details Page**

Usage	Use the Details page to view details of the rate code selected on the Salary Grade Tables - Salary Step Components page.
Object Name	SAL_RATECD_SEC
Navigation	Click the Details button on the Salary Grade Tables - Salary Step Components page.

Rate Code Details Page	
<b>Comp Rate Code:</b>	NAANNL
<hr/>	
<b>Description</b>	Default NA Annual
	<input checked="" type="checkbox"/> <b>Base Pay</b> <input type="checkbox"/> <b>Use Highest Rate</b>
<b>Rate Code Type:</b>	Flat Amount
<b>Rate Code Class:</b>	

Salary Grade Tables - Salary Step Components: Rate Code Details page

**Comp Rate Code**

The system displays the rate code you selected on the Salary Step Components page.

**Description**

The system displays the **Description** defined for the rate code on the Comp Rate Code table.

**Base Pay**

The system displays whether **Base Pay** is selected for the rate code on the Comp Rate Code table.

**Use Highest Rate**

The system displays whether **Use Highest Rate** is selected for the rate code on the Comp Rate Code table.

**Rate Code Type**

The system displays the **Rate Code Type** defined for the rate code on the Comp Rate Code table. Valid values are:

**Flat Amount:** The system enters the rate in each of the four frequencies: Hourly, Daily, Monthly, and Annual.

**Hourly Rate:** The system enters the rate in each of the four frequencies: Hourly, Daily, Monthly, and Annual.

**Hourly Rate + Flat Amount:** The system enters the rate in each of the four frequencies: Hourly, Daily, Monthly, and Annual.

**Percent:** The system enters the percent in the **Percent** column of the grid.

(Salary) **Points:** The system enters the points in the **Points** column of the grid.

---

For more information about rate code types, see PeopleSoft 8 Application Fundamentals for HRMS, “Working with Multiple Components of Pay”.

---

**Rate Code Class**

The system displays the **Rate Code Class**, if any, defined for the rate code on the Comp Rate Code table



For more information about Rate Codes, see Working with Multiple Components of Pay.

## Viewing and Reporting Salary Structures

After you define your salary plans, grades, and steps, you can view a summary of the salary structure online, or print reports that summarize your grade structure or grade and step structure for each plan.

### Salary Structure Summary Page

Usage	Use the Salary Structure Summary page to view all salary grades in a salary plan. This information is helpful when you're planning salary increases.
Object Name	SALARY_STRUCTURE
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Plan Salaries (GBL), Inquire, Salary Structure Summary, Salary Structure Summary</b></li> </ul>
Access Requirements	Enter a Salary Administration Plan.

Salary Structure Summary						
<b>SetID:</b>	SHARE	<b>Salary Administration Plan:</b>	KC01 CDN Salary Administration Plan			
<b>Currency:</b>	CAD Canadian Dollar	<b>Default Salary Matrix Code:</b>	KC01 Non-Exempt Salary Guidelines			
<b>Company:</b>	GBI Global Business Institute	<b>Default Rating Scale:</b>	KC01			
Annual Salary Ranges						
Grade	Minimum	Midpoint	Maximum	Range Spread	Midpoint Progression Matrix	Salary Rating Scale
001 001 CAD	11,142.440	15,596.800	20,051.160	80.0		KCNEX KC01
002 002 CAD	16,952.040	19,531.200	22,110.360	30.4	-20.1	KCNEX KC01
003 003 CAD	21,195.240	24,377.640	27,560.040	30.0	-19.9	KCNEX KC01
004 004 CAD	23,504.040	28,299.720	33,095.400	40.8	-13.9	KCNEX KC01
005 005 CAD	32,614.400	38,459.200	44,304.000	35.8	-26.4	KCNEX KC01
006 006 CAD	41,100.800	48,651.200	56,201.600	36.7	-20.9	KCNEX KC01
007 007 CAD	54,558.360	63,367.200	72,176.040	32.3	-23.2	KCNEX KC01

Salary Structure Summary page



The fields on this inquiry page are the same as those found on the Salary Grade Table page. **For information** about these fields, see Salary Grade Table Page.

---

## Viewing Salary Structures in Printed Reports

In addition to the inquiry page, the Plan Salaries menu includes three reports in which you can view salary structures. Some of these reports are also available in the Administer Workforce menu.

### Salary Structure Report

The Salary Structure report (CMP001) lists all salary grades in descending order by grade. For each grade, it lists the annual minimum, midpoint, and maximum amount being paid.

The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.



For more information about running this report, see [Generating the Salary Structure Report](#).

---

### Salary Grade Table Report

The Salary Grade Table report (PER706A) lists the SetID, salary plan, and salary grade along with its description, effective date, currency, and the minimum, maximum, and midpoint rates for the hourly, daily, monthly, and annual frequencies.



For more information about running this report, see [Generating the Salary Grade Table Report](#).

---

### Salary Grade/Step Table Report

The Salary Grade Table report (PER706B) lists the SetID, salary plan, and salary grade along with its description, effective date, currency, and the minimum, maximum, and midpoint rates for the hourly, daily, monthly, and annual frequencies. For each grade, the report also lists each step with its hourly, daily, monthly, and annual rate. If you select Show Components on the run control page, the report also lists the pay components for each step.



For more information about running this report, see [Generating the Salary Grade/Step Tables Report](#).

---

## CHAPTER 3

# Administering Salary Plans, Grades, and Steps

After you set up your salary structures, you can use them to administer salaries in your organization. You can use these salary plans, grades, and steps to assign default compensation packages to employees at the location, job code, or employee level. If you create salary steps in your salary plans, you can move employees through the steps manually or using an automated process. You can also view employee salary structure information online and in printed reports.

## Administering Compensation With Salary Plan Defaults

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

- Associate the salary plan with a location on the Location Table.
- Associate the salary plan with a job code on the Job Code table.
- Assign a salary plan directly to an employee on the Job Data - Compensation page.

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



If you want the system to automatically enter step component rates in Job Data, select Multi-step Grade on the Installation Table - HRMS Options Page.

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For more information about the Job Data pages, see *Hiring Your Workforce and Updating Workforce Information*. For more information about defaulting of salary plans, grades, and step components, see *Understanding Compensation Defaults*.

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## Tying Salary Plans to Job Codes or Locations

The system always uses the salary grade and step from the Job Code table. It uses the salary plan ID to determine the compensation data associated with the grade and step. The salary plan ID can be tied to the Job Code or the Location.

When deciding whether to tie salary plans to job codes or to locations, consider whether you use the same job code for employees in many locations of your organization, and whether differences that affect employee compensation, such as currency or the cost of living, exist among locations. To set up a salary structure reflecting location differences, tie salary plans to locations in the Location table. The salary plan associated with the location overrides the salary plan tied to the job code. When you select a location for an employee in the Job Data pages, the system enters the salary plan ID from the Location table.

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



For more information about assigning Salary Plans to locations and job codes, see *Setting Up Control Tables*. For more information about defaulting of salary plans, grades, and step components, see *Understanding Compensation Defaults*.

---

## Administering Salary Increases

You can administer salary increases in one of the following ways:

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

The next two topics explain how to enter salary increases manually or by using the Automated Step Increase process.



For more information about salary increase budgets and plans, see *Budgeting and Planning Salary Increases*. For more information about mass salary changes, see *Processing Mass Salary Increases*.

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## Manually Entering Salary Changes in the Job Data Pages

You can manually enter changes to employee salary data using pages in the Administer Workforce menu. You can enter pay rate changes using either the employee Job Data pages or the Pay Rate Change pages. For administrative actions, such as promotions and transfers, use the Job Data pages.

If you're using salary increase guidelines matrices to administer salaries, when you enter a compensation rate on the Compensation page in Job Data or Pay Rate Change, the system compares the compensation rate you enter against the values in the matrix. If the amount you enter is over or under the guidelines, the system issues a warning message. You can still enter an out-of-range rate after you acknowledge the message. If you do not permit any out-of-range salaries in your organization, you can change the warning to an error message so that the system will not allow any out-of-range salaries to be entered.



For more information about changing employee salaries, see Updating Workforce Information. For more information about changing the out-of-range warning message to an error message, see PeopleTools documentation.

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## Entering Salary Increases Using the Automated Step Increase Process

If you enter *Date Based*, *Hours Based*, or *Either* in the Increment Type field in the Step Components setup page, you can use the Automated Step Increase process (CMP007) to automatically move qualified employees into the next step. The system automatically inserts a new job data row for employees who meet the hours or months to next step increment that you specify when you set up the step components. On the Automated Step Increase process run control page you can set minimum review conditions that must be met for an employee to move to the next step.

### Running the Process Using the Application Engine, SQR, and Database Agent

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

To run the Automated Step Increase process:

1. (Optional) Run the Late Reviews process to notify supervisors about employee reviews that are late.
2. Run the Application Engine process (CMP007) to find the employees who are receiving a step increase and load this information to a temporary table.
3. Run the SQR report (CMP007) to review all the data created by running the Application Engine process.

4. Run the Database Agent to load all the data to the Job Data pages for your employees.

### Running the Late Reviews Process

The Late Reviews process is a database agent process that selects all employees who meet the following conditions:

- The last review effective date is on or before the date the process runs.
- *And* the next review date is before the date the process runs or there is no next review date assigned.

If you have Workflow enabled, this process creates a worklist entry for all managers whose employees have not yet received a review.




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For more information about running the Late Reviews process, see [Running the Late Reviews Process](#).

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### Automated Step Increase Process Page

Usage	Use the Automated Step Increase process to automatically move employees to the next salary step when they have completed the required time in the current step. Use this page to enter run control parameters for the Application Engine process, SQR report, and Data Base agent process.
Object Name	RUNCTL_STEPINCR
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Automated Step Increase, Automated Step Increase</b>
Prerequisites	On the Step Components page select Date Based, Hrs Based, or Either in the Increment Type field and enter months or hours to next step increment.
Access Requirements	Enter a Run Control ID.

Automated Step Increase Process page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

**Report Request Parameter(s)**

- Business Unit** Select the **Business Unit** for which you are running the automated step increase.
- Salary Administration Plan** Select the **Salary Administration Plan** for which you are running the automated step increase.
- Start Date** Enter the beginning date of the period for which you want to process salary increases.
- End Date** Enter the last date of the period for which you want to process salary increases. Only employees who are in the specified salary plan during the period defined by the **Start Date** and **End Date** are eligible for a step progression.
- New Job Effective Date** If the salary plan you specify on this page has an hourly-based step progression, enter the **New Job Effective Date**.  
  
If the salary plan you specify on this page has a date-based step progression, the **New Job Effective Date** will be the previous step entry date plus the number of months required for the next step increase.
- Action** Select an action code for the new job row.
- Reason Code** Select a reason code for the new job row.

### Excluding Criteria

You can exclude employees from the automatic increase based on minimum review requirements or missing review.

**No Review** Select the **No Review** check box to exclude employees from the increase because they have not yet received a review.

**Rating Scale** Select a rating scale for which you want to set minimum criteria.

**Review Rating** Enter the minimum criteria for employees if the **Rating Scale** that you selected is an *Average* scale type.

**Total Review Points** Enter the minimum criteria for employees if the **Rating Scale** that you selected is a *Summation* scale type.

Click **Run** to run this request. Process Scheduler runs the Automated Step Increase process at user-defined intervals.



For more information about the Process Scheduler, see Process Scheduler.

### EG Automated Step Increment - Load Auto Step Increments Page

Usage	If you use PeopleSoft Human Resources for Education and Government, use the Load Auto Step Increments process to automatically move employees to the next salary step when they have completed the required time in the current step. Use this page to enter run control parameters for the Application Engine process, SQR report, and Data Base agent process.
Object Name	RUNCTL_CMP107
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, EG Automated Step Increment, Load Auto Step Increments</b>
Prerequisites	On the Step Components page select Date Based, Hrs Based, or Either in the Increment Type field and enter months or hours to next step increment.
Access Requirements	Enter a Run Control ID.

EG Automated Step Increment - Load Auto Step Increments page

- SetID** Select the **SetID** for which you want to process step increases.
  
- Salary Administration Plan** Select the **Salary Administration Plan** for which you want to process step increases.
  
- Salary Grade** Select the **Salary Grade** for which you want to process step increases.
  
- Start Date for Step Increments** Enter the beginning date of the period for which you want to process salary increases.
  
- End Date for Step Increments** Enter the last date of the period for which you want to process salary increases. Only employees who are in the specified salary plan during the period defined by the **From Date** and **Thru Date** are eligible for a step progression.
  
- Job Effective Date** If the salary plan you specify on this page has an hourly-based step progression, enter the **New Job Effective Date**.  
  
If the salary plan you specify on this page has a date-based step progression, the **New Job Effective Date** will be the previous step entry date plus the number of months required for the next step increase.
  
- Processing Options**

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

**Report & Process Increases** Select this value if you want to process the increases and produce a report.

### Audit Indicators

Select the indicators you want to include in audit information. Valid values are **Step, Step Entry Date, Compensation Rate, Hourly Rate, Monthly Rate, Annual Rate, Change Amount, and Change Percent.**

### Exclusions

**Rating Scale** Select a rating scale for which you want to set minimum criteria.

**Rating Model** The system displays the **Rating Model** associated with the selected **Rating Scale**.

**Review Rating** Enter the minimum criteria for employees if the **Rating Scale** that you selected is an *Average* scale type.

## Viewing Employee Salary Structure Information

After you tie your salary structures to job codes and assign them to employees, you can view the job code information on the Job Code table, or the employee information in the Job Data pages.

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### Viewing Salary Survey Data or Midpoints by Job Code

If you use salary survey data to compare your salary structures with other organizations, you can enter and view this information in the Job Code table. You can enter salary amounts and associated job codes from the salary survey.

In the Job Code table you can also view the midpoint pay rates for the salary grade tied to a job code. You'll see hourly, daily, monthly, and annual midpoint rates, and the currency used.



For more information about the Job Code table, see Setting Up Control Tables.

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### Viewing Compa-Ratios

The compa-ratio calculation is available for you to see where employees' salaries lie in relation to the midpoint range for their salary grades. The ratio appears in the Job Data - Compensation page for each employee.

The system calculates the ratio by comparing the employee salary to the midpoint amount of the salary grade. If the employee's current rate is the same as the midpoint, the compa-ratio is 1.00, or 100 percent of the midpoint. If the rate is above or below the midpoint, the system calculates a

ratio for the difference between the salary and the midpoint, then adds or subtracts the difference from 1.00.

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## Viewing Range Calculations

The percent in range calculation is also available for you to see where employees' salaries fall within the range set up for their salary grades. Both this calculation and the compa-ratio appear in the Pay Rate Change - Compensation page for each employee.

The Range % tells you where the employee's salary falls within the employee's salary grade range. The system calculates the Range % as follows.

If the employee falls below the Minimum Range, the system uses the following calculation:

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

If the employee falls above the Maximum Range, the system uses the following calculation:

$$\text{Range \%} = ((\text{EE Salary} - \text{Max of Range}) \times 100) / \text{Max} + 100$$

If the employee falls in the Range, the system uses the following calculation:

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

## Reporting Employee Salary Structure Information

After you assign salary plans, grades, and steps to locations, job codes, or employees, you can run reports to view lists and comparisons of the data.

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### Job Grading by Evaluation Points Report

The Job Grading by Evaluation Points Report (CMP002) lists each salary grade in your organization. It includes all titles within that grade and the job evaluation points that you assign to the responsibilities of each job title in your organization in the Job Code table. The report also includes salary survey information and associated point ratios and midpoints.



For more information about running this report, see *Generating the Job Grading by Evaluation Points Report*.

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### Compa-Ratio Analysis by Grade Report

The Compa-Ratio Analysis by Grade report (CMP003) compares an employee's salary to the others in the same salary grade. It lists each employee in the salary grade and the midpoint amount of the salaries in that grade. For each employee, the report lists job code, title, name, and

department ID. The report displays those employees whose Employee Status is *Active*, *Leave of Absence*, *Suspended*, or *Leave with Pay*. The last two columns pertain to a compa-ratio calculation for each employee.

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For more information about running this report, see *Generating the Compa-Ratio Analysis Report*.

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### **Below Minimum Analysis Report**

The Below Minimum Analysis report (CMP004) lists employees making less than the minimum amount in their salary grade. It lists the salary grades containing employees under the minimum, the associated minimum amount, the employee's annual rate, and the amount below both in amount and as a percentage.

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For more information about running this report, see *Generating the Below Minimum Analysis Report*.

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### **Above Maximum Analysis Report**

The Above Maximum Analysis report (CMP005) lists all employees whose annual rate is above the maximum amount for the salary grade. For each employee, the report shows job code and title, name, department ID, the maximum amount, the employee's annual rate, and the amount above maximum both in amount and as a percentage.

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For more information about running this report, see *Generating the Above Maximum Analysis Report*.

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## CHAPTER 4

# Reviewing Employee Performance

You can conduct salary reviews or performance reviews for your employees. You can set up groups of employees and define the review criteria and method of calculating review results for the group. If you conduct salary reviews, you can determine the review result distribution and use the review results to administer salary increases in different ways depending upon the rating scale you use to review the employee. If the review includes goals from the employee's career plan, the system updates the career plan to reflect goal achievements.

After you conduct the employee review, you can view the review results and review history in inquiry pages and reports.

## Overview of Review Rating Scales

Review rating scales provide a means of quantifying the overall results of an employee's review. You associate a set of competencies with the rating scale and determine the method of scoring each competency. The method of scoring depends upon whether you are setting up an Average scale type, Summation scale type, or Review Band scale type. The setup details are covered in the overview topics for each scale type.

### Using Review Results to Administer Salary Increases

The following list summarizes how the system uses the results of each scale type in administering salary increases.

- If you set up an Average rating scale, the system uses the review results to verify employee salary increases against a salary increase matrix.
- If you set up a Summation scale type, you also define the method that the system uses to resolve points into salary increases.
- If you set up a Review Band scale type, the system resolves points into review bands that you define.

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## Terms and Definitions

The following terms are important in understanding employee review pages and functionality:

**Rating Model**

A rating model is a set of codes representing the levels of performance you assign when evaluating employee performance. The following is an example of a rating model:

- 1 - Excellent
- 2 - Good
- 3 - Needs Improvement
- 4 - Unacceptable

You can set up more than one rating model if appropriate for evaluating different categories of employees.

**Rating Scale**

Also known as Review Rating Scale. A rating scale provides a means of quantifying the overall results of an employee's review. The rating scale combines a list of competencies with a rating model and a method of calculating the employee's performance in each competency. The method of calculating depends upon whether you are setting up an Average, Summation, or Review Band rating scale type.

**Rating Scale Type**

The rating scale type determines the method of calculating an employee's performance in the competencies that you include in the rating scale. The system provides the following three rating scale types:

**Average.** You associate each competency in the rating scale with a weight expressed as a percent. The system multiplies the weight by the employee's rating (selected from the rating model) to calculate the review results for each competency.

**Summation.** For each competency in the rating scale, you associate each rating in the rating model with a number of review points. The system converts the employee's rating (selected from the rating model) into the points you assigned to the competency, and adds the results. You define how the system resolves the total points into a salary increase.

**Review Band.** The method of setting up and calculating the employee's performance rating is the same as for the Summation type, but you resolve the total points into a review band.

**Merit Scale**

A merit scale is an incremental scale of salary increases associated with ranges of Summation type review rating points. You define how the points resolve into salary increase values for each range of points.

**Overview of the Average Rating Scale Type**

Use the Average rating scale if your organization uses salary increase matrix guidelines for planning and administering salary increases.

When you set up the Average rating scale, you associate each competency with a percentage weight. When you evaluate an employee’s performance in the employee review pages, you select a rating from the rating model for each competency. The system calculates the employee’s overall review rating by multiplying the rating for each competency by the weight for the competency and summing the results.

You can verify and adjust the review result distribution of a group using the Review Result Distribution pages.

The system uses the employee’s Average scale review rating when verifying salary increases against the salary increase matrix guidelines. The system verifies that the salary change percent falls into the matrix for the employee’s review rating and quartile.



For more information about entering salary increases, see Administering Salary Increases. For more information about review result distribution, see Overview of Employee Review Result Distribution.

**Example of Average Scale Calculation**

In the following example the rating model is a scale of 1 to 5, where 1 stands for Outstanding and 5 stands for Unacceptable. This employee’s review rating would be 1.7.

<b>Competencies</b>	<b>Weights</b>	<b>Employee’s Rating</b>
Decision Making Abilities	40%	1
Communication Skills	25%	3
Judgement	20%	2
Adaptability to Change	15%	1

The following is the calculation of this employee’s rating:

$$(1 \times 0.40) + (3 \times 0.25) + (2 \times 0.20) + (1 \times 0.15) = 1.7$$

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## Overview of the Summation Rating Scale Type

Use the Summation scale type if your organization uses a points system to evaluate employees.

When you set up the Summation rating scale, you associate each rating in your rating model with review points for each competency that you include. You also define how the system should resolve the points into the monetary value of salary increases.

When you evaluate an employee's performance in the employee review pages, for each competency you select a rating from the rating model. The system calculates the employee's overall review rating by converting the rating for each competency into the number of points you assigned to that rating and summing the points for all competencies. It then resolves the overall review rating into a salary increase according to the way you defined the resolution of points.

### Methods for Resolving Points

On the Rating Scale page you define one of the following four methods of resolving points:

- Amount per point.

You define the amount per point and select a rate code that the system uses to record the salary increase amount on the Compensation record. You must select a rate code that has the rate code type of Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount.

- Percent per point.

You define the percent per point and select a rate code or a rate code group to which the system applies the percent.

- Salary Points per review point.

You define the salary points per point and select a rate code that the system uses to record the salary increase on the Compensation record. You must select a rate code that has the rate code type of Points. Use Salary Points must be selected on the Installation table; otherwise the system issues the message "A rate type of 'Points' is not allowed for this installation."

- Refer to the Merit Scale table.

You select a merit scale; the system resolves the points according to where the total falls in the merit scale. On the Rating Scale setup page you select a rate code that the system uses to record the salary increase on the Compensation record. The rate code type of the rate code that you select must be consistent with the method of resolving points that you defined on the Merit Scale table.

### Example of Summation Scale Calculations

This example illustrates the following three processes:

- Setting up the ratings and points.
- Calculating an employee's total review rating points.

- Resolving the points into a salary increase by the four resolution methods.

**Assigning Points to Ratings and Competencies**

<i>Rating Model</i>	<i>Decision Making</i>	<i>Team Work</i>	<i>Technical Skills</i>	<i>Communication</i>
1: Excellent	12 pts	8 pts	15 pts	8 pts
2: Very Good	8 pts	6 pts	10 pts	6 pts
3: Acceptable	5 pts	4 pts	6 pts	4 pts
4: Unacceptable	0 pts	0 pts	0 pts	0 pts

**Employee Review Points Calculation**

<i>Competency</i>	<i>Review Rating</i>	<i>Points</i>
Decision Making	2: Very Good	8
Communication	3: Acceptable	4
Technical Skills	1: Excellent	15
Team work	2: Very Good	6
	Total Review Points	33

**Salary Increase Calculations**

<i>Point Resolution</i>	<i>Point Value</i>	<i>Increase</i>	<i>Applied to Compensation</i>
Amount	10 German Marks (DM) per point	$10 \times 33 = 330\text{DM}$	Applied to the rate code specified on the Rating Scale table
Percent	.1% per point	$.001 \times 33 = 3.3\%$	Applied to all base rate codes or the rate codes defined in the rate code group specified on the Rating Scale table
Salary Points	1 point per review point (The point value defined on the Company table in this example is 1 point = 5 French Francs (FRF))	$5 \times 33 = 165 \text{FRF}$	Applied to the rate code specified on the Rating Scale table
Merit Scale	Determine the group into which the total review points fall on the	Amount, percent, or salary points, according to the resolution method	Applied to the rate code specified on the Rating Scale table or the rate code group (percent) specified on the

<b><i>Point Resolution</i></b>	<b><i>Point Value</i></b>	<b><i>Increase</i></b>	<b><i>Applied to Compensation</i></b>
	Merit Scale table.	you defined for the point range on the Merit Scale table	Merit Scale table

### **Processing Summation-Type Review Results**

If you resolve summation-type review points through a merit scale, you can verify and adjust the review result distribution before processing the employees' review results to their Job Data records.

When you are satisfied with the summation-type review results, you can run the Review Results to Job Data process to load the review results data and the salary change data into each employee's Job Data record.



For more information about the Review Results to Job process, see Running the Review Results to Job Data Process. For more information about review result distribution, see Overview of Employee Review Result Distribution.

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## **Overview of the Review Band Rating Scale Type**

Use the Review Band scale type if your organization uses a points system to evaluate employees and classifies the points into review bands with unique alphabetic or numeric IDs.

When you set up the Review Band rating scale, you associate each rating in your rating model with review points for each competency that you include.

When you evaluate an employee's performance in the employee review pages, for each competency you select a rating from the rating model. The system calculates the employee's overall review rating by converting the rating for each competency into the number of points you assigned to that rating and summing the points for all competencies. It then resolves the overall review rating into a review band according to the way you defined review bands on the merit scale table.

After you review employees and the system calculates their review bands, you can use the Review Result Distribution pages to verify and adjust the review results.

### **Setting Up a Review Band Rating Scale**

To set up a Review Band rating scale:

1. Define review band IDs on the Review Band Table page.
2. Assign review band IDs to ranges of review rating points on the Merit Scale Table page.

3. Set up a Rating Scale on the Rating Scale table pages.
  - Select a merit scale on which you have defined review bands on the Rating Scale page.
  - Select Competencies on the Competencies page.
  - Assign ratings and points to the competencies on the Ratings and Points page.

## Overview of Employee Review Result Distribution

You can define how you want the various employee review results to be distributed over a group population and optionally associate the group with a salary increase budget. After you review employees, you can view the distribution results and variances. If desired, you can adjust review results to match your desired distribution and budget. It is important that you define your group carefully and review all employees in the group by the same method.

To set up and use employee review result distribution functionality:

1. Define an employee group using Group Build pages.

Before you can set up a review result distribution, you must use the Group Build pages to set up groups that are clearly defined and don't overlap. An employee cannot be a member of more than one group for which you are defining and evaluating a review result distribution. For that reason it is very important that you use the Group Build operand "in list" with caution when you define review result distribution groups. Use the Group Member Overlap report that is part of the Group Build menu to identify any overlapping groups.



For more information about setting up groups, see [Working With Groups](#).

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2. (Optional) Define a salary increase budget for the employee review group.



For more information about setting up budgets, see [Budgeting and Planning Salary Increases](#).

---

3. Define the desired review result distribution on the Review Result Distribution setup page.

On this page you also select the review type and review rating scale for the group. It is important that all members of the group receive identical reviews. You can optionally associate a budget ID with the review group and distribution.

4. Review the employees in the group using the Employee Review by Group page and the Employee Review page.
5. Verify the review result distribution on the Review Result Distribution inquiry page.

If you associated a budget ID with the review result distribution, the system displays the budgeted amount, the actual salary increase amount for the actual distribution, and the variance between the two.

- Verify and adjust the review result distribution on the Employee Review Result Distribution inquiry page.

On this page you can see individual employee review results in addition to the group distribution results. You can access an employee’s Employee Review page to adjust the review result in order to achieve the desired distribution.

- Print the Employee Review Result Distribution report.

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### Examples of Review Result Distribution

The review result distribution option is available if you use an Average type rating scale, a Review Band type rating scale, or a Summation type scale with point value resolution defined through a merit scale. The following examples illustrate how your distribution might look in each of these situations:

#### Average rating scale

<i>Review Rating</i>	<i># of People with this Result</i>	<i>Desired Distribution</i>	<i>Actual Distribution</i>	<i>Variance</i>
1 - Excellent	20	10%	20%	+10%
2 - Good	50	50%	50%	0%
3 - Average	30	40%	30%	-10%

#### Review Band rating scale

<i>Review Band</i>	<i># of People with this Result</i>	<i>Desired Distribution</i>	<i>Actual Distribution</i>	<i>Variance</i>
S	20	10%	20%	+10%
A	50	50%	50%	0%
B	30	40%	30%	-10%

#### Summation rating scale associated with a merit scale that resolves points into an Amount

<i>Amount per Point</i>	<i># of People with this Result</i>	<i>Desired Distribution</i>	<i>Actual Distribution</i>	<i>Variance</i>
DM500	20	10%	20%	+10%
DM1000	50	50%	50%	0%
DM1500	30	40%	30%	-10%

**Summation rating scale associated with a merit scale that resolves points into a Percent**

<i>Percent per Point</i>	<i># of People with this Result</i>	<i>Desired Distribution</i>	<i>Actual Distribution</i>	<i>Variance</i>
20%	20	10%	20%	+10%
10%	50	50%	50%	0%
5%	30	40%	30%	-10%

**Summation rating scale associated with a merit scale that resolves points into Salary Points**

<i>Salary Points per Point</i>	<i># of People with this Result</i>	<i>Desired Distribution</i>	<i>Actual Distribution</i>	<i>Variance</i>
15	20	10%	20%	+10%
10	50	50%	50%	0%
5	30	40%	30%	-10%

**Setting Up Employee Review Tables**

Before you can conduct employee reviews, you must define competencies, rating models and rating scales. Depending on the rating scale you are using, you might also be required to define a merit scale table and/or review bands. If you use review result distribution functionality, you must also define the distribution.

To set up employee review tables:

1. Define competencies on the Competency Table page.

Competencies are the criteria you use to review employees, such as Leadership, Technical Knowledge, or Adaptability to Change. You can use competencies that you've defined for other business processes or define competencies specifically for employee reviews in connection with salary planning.

2. Define rating models on the Rating Model Table page.

Rating models represent the levels of performance you assign when evaluating employee performance, such as Excellent, Good, Needs Improvement, and Unacceptable. You can set up more than one rating model if appropriate for evaluating different categories of employees.

3. (Optional) Define review bands on the Review Band Table page.

If you use review bands to determine salary increases, you define alphabetic or numeric review band IDs.

4. Define merit scales on the Merit Scale Table page.

A merit scale is an incremental scale of salary increases associated with ranges of Summation-type review rating points. You define how the points resolve into salary increase values for each range of points.

You must set up a merit scale under the following conditions:

- If you plan to set up a review result distribution with a Summation-type rating scale, you must resolve your review points using a merit scale.
- If you use a Review Band-type review rating scale, you use the Merit Scale Table setup page to assign a review band ID to each range of rating points.

Otherwise you do not have to set up a merit scale.

5. Define rating scales on the Rating Scale Table page.



For more information about rating scales see Overview of Review Rating Scales.

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6. (Optional) Define a review result distribution on the Review Result Distribution setup page.

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## Enterprise Integration Points Related to Employee Review Tables

When you add, delete, or change information in the Rating Model or Rating Scale records, the system automatically publishes the Rating Model EIP or Review Scale Tables EIP message to any other PeopleSoft or third-party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the Rating Model or Rating Scale records.



For more information about the subscribers and technical details of the Rating Model EIP or Review Scale EIP, see Rating Model or Review Scale Tables. For more information about PeopleSoft Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

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## Defining Competencies

Competencies are the criteria you use to review your employees. Use the Competency Table page to add, update, or review competencies that you associate with rating scales for employee review.

You can also access the Competency table through the Manage Competencies menu. For salary planning and employee review you may use competencies that you define for other business processes or you can define new competencies.



For more information and complete documentation of this page, see Competency Table Setup Page.

### Rating Model Table Page

Usage	Use the Rating Model Table page to define a set of alphabetic or numeric codes for rating an employee's performance. You can define more than one rating model for use with different rating scales.
Object Name	RATING_MDL_TBL
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Rating Model Table, Rating Model Table</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Rating Model Table, Rating Model Table</b></li> </ul>
Prerequisites	None
Access Requirements	Enter a Rating Model ID.

The screenshot shows the 'Rating Model Table' page. At the top, the 'Rating Model' is set to 'KC01'. Below this, the 'Description' section contains fields for 'Effective Date' (01/01/1980), 'Status' (Active), 'Description' (Canadian Rating Model), and 'Short' (Cdn Model). A 'Ratings' table is displayed below, with columns for 'Rating', 'Description', and 'Short Description'. The table contains four rows of data:

Rating	Description	Short Description
1	Exceeds Job Requirements	Exceeds
2	As Expected	Expected
3	Improvement Required	Imprv Req
4	Does not meet Job Requirements	Not Met

Rating Model Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date** and **Status**.

**Rating Model** The system displays the Rating Model ID that you entered when you accessed the page.

**Description**

**Description** Enter a description of the rating model.

**Short (description)** Enter a short description of the rating model.

**Ratings**

**Rating** Enter an alphabetic or numeric code to represent the rating you are defining. You can add as many rows as necessary to define the ratings in your rating model.

If you use the Employee Review pages to review employees, you must define ratings with numeric codes. The system cannot calculate averages for alphabetic ratings.

**Description** Enter a description of this rating.

**Short Description** Enter a short description of the rating.

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**Review Band Table Page**

Usage	Use the Review Band Table page to define review bands that you can assign to ranges of review rating points on the Merit Scale table.
Object Name	REVIEW_BAND_TBL
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Setup, Review Band Table, Review Band Table</b>
Prerequisites	None
Access Requirements	Enter a Review Band ID.

The screenshot shows a web interface titled "Review Band Table". It contains the following fields and controls:

- Review Band:** A text input field containing the value "A".
- Description:** A header bar with navigation controls: "View All", "First", "1 of 1", and "Last".
- \*Effective Date:** A date input field containing "01/01/1980" with a calendar icon.
- \*Status:** A dropdown menu currently set to "Active".
- Description:** A text input field containing "Review Band A".
- Short Description:** A text input field containing "A".

Review Band Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date** and **Status**.

**Review Band** The system displays the Review Band ID that you entered when you accessed the page.

**Description**

**Description** Enter a description of the review band you are defining.

**Short Description** Enter a short description of the review band.



For more information about using review bands, see Overview of Review Rating Scales.

**Merit Scale Table Page**

Usage	<p>Use the Merit Scale Table page to define groups of review result points. Each group represents a range of points. For each group you define the method of resolving review points into a salary increase. You can resolve points in terms of amount, percent, or salary points. You can also associate the groups with a review band.</p> <p>You must set up a merit scale if the review rating scale type is Review Band. This table is optional if the rating scale type is Summation. This table does not apply if the rating scale type is Average.</p>
Object Name	MERIT_SCALE_TBL
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Manage Performance (USF), Setup, Merit Scale Table, Merit Scale Table</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Merit Scale Table, Merit Scale Table</b></li> </ul>
Prerequisites	If you are defining review rating point ranges for review bands, you must first define review band IDs on the Review Band table.
Access Requirements	Enter a Merit Scale ID.

Merit Scale Table

Merit Scale: KAMT

Description View All First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active

\*Description: Amount Short: Amount

Group	From	To	Amount	*Currency	Percent	Rate Code Group	Salary points	Review Band
1	1	10	100.00000	USD				
2	11	20	200.00000	USD				

Merit Scale Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, and **Short**.



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

### Merit Group

**Group**

Enter an identifier for the first range of review points you are defining. The value you enter here can be either a number or letter, or combination of the two.

**From**

Enter the beginning value in the range of review points for this group. For example, your first group could have a range of values from 1 to 10. Your second group could have values from 11 to 20 and so on.

**To**

Enter the final value in the range for this group.

**Amount**

If you resolve points in terms of a flat amount, hourly rate, or hourly rate + flat amount, enter the amount that corresponds with this group of points.

On the Rating Scale setup page you will select the rate code, frequency, and currency the system should use for merit increases associated with that rating scale.

**Currency**

Select the currency code associated with the **Amount**.

All other fields on this page are unavailable for data entry if you entered an **Amount** and **Currency**.

**Percent**

If you resolve points in terms of a percent, enter the percent that corresponds with this group of points.

**Rate Code Group**

If you do not want the percent increase to apply to all of the base rate codes in an employee’s compensation package, select a **Rate Code Group** to which the percent should apply.

This field is hidden if you did not select Use Rate Code Groups on the Installation Table.

All other fields on this page are unavailable for data entry if you entered a **Percent** and **Rate Code Group**.

**Salary Points**

If you resolve review rating points in terms of salary points, enter the points that correspond with this group of points.

This field is hidden if you did not select Use Salary Points on the Installation Table.

All other fields on this page are unavailable for data entry if you entered **Salary Points**.

**Review Band**

If you use the Review Band rating scale type, enter the ID of the review band that you want to associate with this group of points.



For more information about Salary Points and Rate Code Groups, see Working with Multiple Components of Pay. For more information about using review bands, see Overview of Review Rating Scales.

**Defining Rating Scales**

Use the Rating Scale Table pages to define your review rating scales. You use these pages differently depending upon whether you are setting up an Average, Summation, or Review Band rating scale type. The following table illustrates how you use these pages for the various rating scale types.

<i>Scale Type</i>	<i>Rating Scale Page</i>	<i>Competencies Page</i>	<i>Ratings and Points Page</i>
Average	Define the rating scale ID. Select a rating model.	Select Competencies. Assign weighting percents to the competencies.	Not used for Average scale type

<b>Scale Type</b>	<b>Rating Scale Page</b>	<b>Competencies Page</b>	<b>Ratings and Points Page</b>
Summation	Define the rating scale ID. Select a rating model. Define the resolution of points into a salary increase.	Select Competencies.	Assign a number of points to each rating in the rating model.
Review Band	Define the rating scale ID. Select a rating model. Select a merit scale.	Select Competencies.	Assign a number of points to each rating in the rating model.



**For overview information** about setting up and using each of these three rating scale types, see Overview of Review Rating Scales.

**Rating Scale Table - Rating Scale Page**

Usage	Use the Rating Scale page to define a rating scale, its rating model, and its type. For Summation scale types you also define the method of resolving points into salary increases.
Object Name	REVIEW_RATING_TBL1
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Rating Scale Table, Rating Scale</b></li> <li>• <b>Administer Workforce, Administer Workforce (USF), Setup, Rating Scale Table, Rating Scale</b></li> <li>• <b>Administer Workforce, Manage Performance (USF), Setup, Review Rating Table, Rating Scale</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Rating Scale Table, Rating Scale</b></li> </ul>
Prerequisites	Define a rating model. Define a merit scale if you want to associate the rating scale with a merit scale, or if the rating scale type is Review Band.
Access Requirements	Enter a Rating Scale ID.

Rating Scale Table - Rating Scale page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, and **Short Descr** (short description).

### Defining a Rating Model

#### Rating Model

Select a rating model from the list of valid values, which you define on the Rating Model Table setup page.

#### Scale Type

Select a **Scale Type** from the following values:

**Average:** Select this value if your organization uses a system of weighted averages to review employee performance. If you select **Average**, all remaining fields on this page become hidden.

**Rev. Band** (review band): Select this value if your organization uses a point system to evaluate employee performance and resolves those points into review bands. If you select **Rev. Band**, all remaining fields become unavailable for data entry with the exception of the Merit field.

**Sum** (summation): Select this value if your organization uses a point system to evaluate employee performance and resolves those points into salary increases.

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For more information about scale types, see Overview of Review Rating Scales.

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## Defining the Method of Resolving Rating Points

In these fields you define how you want the system to resolve review rating points into salary increases. Certain fields become unavailable for data entry depending upon the scale type that you selected, the method that you select for resolving points, or the rate code type of the rate code that you select.

### Merit Scale

If you selected **Rev. Band** as the **Scale Type**, select the merit scale that defines the review bands and point ranges that you want the system to apply to this rating scale.

If you selected **Sum** as the **Scale Type** and you want to resolve points according to the definition of point ranges on a merit scale, select the merit scale ID from the list of valid values.

### Rate Code

If you resolve rating points into a flat amount or hourly salary increase, select the rate code that you want the system to enter into the Job record when it loads the increase.

If you resolve rating points into a percent increase, select the rate code (or **Rate Code Group**) to which you want the system to apply the percent.

If you resolve rating points into salary points, select the rate code to which you want the system to apply the points.

The system displays the rate code description and rate code type.

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**Note.** The rate code type of the rate code you select must be consistent with the method of resolving points.

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### Frequency

Select the compensation frequency of the salary increase. Valid values are stored on the Frequency table.

### Currency

Select the currency in which you want to pay the salary increase.

<b>Amount</b>	<p>Enter the amount of the salary increase per point if you selected a rate code that has Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount as the rate code type. The system adds this amount to the employee's current compensation for the rate code when it loads the review results to the Job record.</p> <p>For example, an employee's annual compensation for the selected rate code, NAANNL, is \$50,000 USD. You define the value of each review point as \$100 annually. The employee earns 20 review points, so the system adds \$2,000 to the employee's compensation for the rate code. The new annual compensation rate for NAANNL is \$52,000.</p>
<b>Change Percent</b>	<p>Enter the percent of increase that you want to add to the rate code compensation if you selected a rate code that has Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount as the rate code type.</p> <p>For example, an employee's annual compensation for the selected rate code, NAANNL, is \$100,000 USD. You define the value of each review point as .1 percent. The employee earns 30 review points, so the system adds 3 percent to the employee's compensation for the rate code. The new annual compensation rate for NAANNL is \$103,000.</p>
<b>Percent</b>	<p>Enter the percent of the salary increase per review point if you selected a rate code that has Percent as the rate code type.</p>
<b>Rate Code Group</b>	<p>Select the rate code group on which you want the percent increase to be calculated.</p>
<b>Salary Points</b>	<p>Enter the number of salary points you want the system to calculate for each review rating point. The system adds these points to the compensation for the rate code that you selected.</p> <p>For example, an employee's current salary points for the selected rate code, NABP01, is 100 points. You define the value of each review point as 1 salary point. The employee earns 30 review points, so the system adds 30 salary points to the current salary points for the rate code. The new salary points for NABP01 is 130.</p>

**Percent of Points**

Enter the percent of increase that you want to add to the number of salary points applied to the selected rate code.

For example, an employee’s current salary points for the selected rate code, NABP01, is 100 points. You define the value of each review point as 1 percent of salary points. The employee earns 30 review points, so the system adds 30 percent of the current salary points to the total salary points for the rate code. The new salary points for NABP01 is 130.

**Rating Scale Table - Competencies Page**

Usage	Use the Competencies page to associate specific competencies with your rating scale.  For Average rating scale types, you specify the relative weights of competencies.
Object Name	REVIEW_RATING_TBL2
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Rating Scale Table, Competencies</b></li> <li>• <b>Administer Workforce, Administer Workforce (USF), Setup, Rating Scale Table, Competencies</b></li> <li>• <b>Administer Workforce, Manage Performance (USF), Setup, Review Rating Table, Competencies</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Rating Scale Table, Competencies</b></li> </ul>
Prerequisites	Define competencies on the Competency Table setup page.
Access Requirements	Enter a rating scale ID.

Rating Scale: PAS

Description: Performance Appraisal System  
Effective Date: 01/01/1980

Total Percent: 50

Seq Nbr	Competency	Weight (%)
1	0205 Teamwork and cooperation	50
2	0513 Technical Knowledge	50

Rating Scale Table - Competencies page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description.**

**Description**

- Rating Scale**                      The system enters the Rating Scale ID you entered when you accessed the page.
- Effective Date**                      Select the effective date of the rating scale for which you want to enter or update competencies.
- Total Percent**                      The system displays the accumulated total as you add competencies and weighting percents.

**Competencies**

- Seq Nbr** (sequence number)      The system automatically numbers the rows in sequence.
- Competency**                      Select a competency from the list of valid values, which you define on the Competency table.
- Weight (%)**                      This field is only visible if the rating scale type is Average.  
  
Enter a weighting percent for each competency. The total of all weighting percents must be 100%.

**Rating Scale Table - Ratings and Points Page**

Usage	Use the Ratings and Points page to assign a number of review rating points to each value in your rating model for each competency you defined for the rating scale.  Use this page only if the rating scale type is Summation or Review Band.
Object Name	REVIEW_RATING_TBL3
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Setup, Rating Scale Table, Ratings and Points</b></li> <li>• <b>Administer Workforce, Administer Workforce (USF), Setup, Rating Scale Table, Ratings and Points</b></li> <li>• <b>Administer Workforce, Manage Performance (USF), Setup, Review Rating Table, Ratings and Points</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Setup, Rating Scale Table, Ratings and Points</b></li> </ul>
Prerequisites	Define rating model. Associate competencies with the rating scale.
Access Requirements	Enter a rating scale ID.

Review Rating	Description	Review Points
1	Unacceptable	0
2	Minimally Successful	1
3	Fully Successful	3
4	Superior	5

Rating Scale Table - Ratings and Points page

**Description**

**Rating Scale**

The system enters the Rating Scale ID you entered when you accessed the page.

**Effective Date**

Select the effective date of the rating scale for which you want to enter or update competencies.

**Competency**

**Competency**

Select one of the competencies you defined for the rating scale using the next and previous buttons, or add a new competency from the list of valid values.

**Ratings and Review Points**

**Review Rating**

Select a review rating from the values you defined in your rating model.

**Review Points**

Assign a number of points to the selected review rating for the selected competency.

By assigning different review points to the same rating for different competencies, you can implicitly weight the different competencies.

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**Review Result Distribution Setup Page**

Usage	Use the Review Result Distribution page to define the desired distribution of employee review results. You can use this optional setup
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	page for rating scales when the rating scale type is Average or Review Band. You can also use it for Summation rating scale types if you resolve the point value by means of a merit scale.
Object Name	REVIEW_RESULT_DIST
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Setup, Review Result Distribution, Review Result Distribution</b>
Prerequisites	Set up clearly defined groups that do not overlap using Group Build pages.
Access Requirements	Enter a Group ID.

Review Result Distribution

Group ID: KU005      KU005

**Review Distribution** View All    First 1 of 1    Last

Effective Date: 04/01/2000      Status: Active

Description: KU005 - Average Review Result Dist      Short Desc: KU005

---

Review Type: Salary      KU01      Salary Matrix Code: KUNEX

Rating Scale: KU01      Rating Model: KU01      Budget ID:

Total Percent: 100

**Desired Review Distribution**

Review Rating	Desired Distribution
1	10.00
2	20.00
3	60.00
4	10.00
5	0.00
6	0.00
7	0.00

Review Result Distribution page



Visible fields vary by implementation.

**Group ID**

The system enters the Group ID that you entered when you accessed the page. It also displays the description of the group.

**Review Distribution**

**Effective Date**

Enter the date on which you want this review result distribution to be active for the group.

**Status**

The system enters *Active* by default.

<b>Description</b>	Enter a description of this review result distribution.
<b>Short Desc</b> (short description)	Enter a short description of this review result distribution.
<b>Review Type</b>	Select the type of review. This is important to verify that all members of the group receive identical reviews.
<b>Salary Matrix Code</b>	If the rating scale type is Average, select the salary increase guidelines matrix that you associate with this rating scale for this group of employees.
<b>Rating Scale</b>	Select the rating scale you are using to evaluate this group of employees.
<b>Rating Model</b>	The system enters the rating model you associated with the rating scale on the Rating Scale table.
<b>Budget ID</b>	This field is optional, and can only be used if your rating scale type is Summation and you defined the resolution of points using a merit scale in terms of an amount. If those conditions are met and you created a salary increase budget for this group ID, enter the budget ID here.
<b>Total Percent</b>	The system dynamically sums and displays the accumulated percent total as you enter or change percents for each review result in the Desired Review Distribution grid. The total must be 100 percent when you save the page.

### Desired Review Distribution

The system displays the appropriate columns according to how you defined the rating scale.

<b>Group</b>	The system enters the IDs that you assigned to groups (ranges) of points on the Merit Scale table.
<b>From</b>	The system enters the beginning rating of each group.
<b>To</b>	The system enters the ending rating of each group.
<b>Amount</b>	(Summation scales) The system enters the Amount you defined on the merit scale for resolution of points in this group.
<b>Percent</b>	(Summation scales) The system enters the Percent you defined on the merit scale for resolution of points in this group.
<b>Salary Points</b>	(Summation scales) The system enters the Salary Points you defined on the merit scale for resolution of points in this group.

- Review Band** (Review Band scales) The system enters the review band you defined for this group.
- Review Rating** (Average scales) The system enters the Review Ratings that you defined for your rating scale.
- Desired Distribution** For each group or review rating, enter the percent of the total review that you desire in your outcome.

## Conducting Employee Reviews

Use the Employee Review pages to enter detailed information on salary reviews, performance reviews, or both. Multiple reviewers can conduct reviews on each employee, and you can weight the reviewers' results. You can access the Employee Review page for an individual employee directly or by first accessing the employee's review group on the Employee Review by Group page.

The following table summarizes the Employee Review pages:

<b><i>Employee Review Page</i></b>	<b><i>Usage</i></b>
Employee Review	Record dates and results of the employee's review and select the rating scale.
Reviewers	Each reviewer uses this page to conduct the review. You indicate the weighting factor for each reviewer. The system provides the list of competencies that you included in the rating scale and appropriate review fields. Each reviewer can access a page to record comments of any length about the evaluation of each competency.
Comments	Each reviewer can use this page to record comments about the overall review.
Goals	Use this page to review or specify employee goals and objectives. You can include goals from the career plan. The system updates the employee's career plan with information you enter on this page.
Employee Review by Group	Use this page to view a list of all employees in a review group and to access the Employee Review page for each employee in the group.

You'll also find the Employee Review pages in the Plan Careers menu. To enter review information, you can use either page; they are the same.

### Before You Begin

Before you track employee review details, specify default review rating scales for employees in the Job Data, Salary Plan page. The rating scale you enter there tells the system which competencies and rating model to use for the employee. In some cases you can use a different rating scale for the review, but the system will issue a warning. If the rating scale type is Review Band, you cannot change the rating scale for the review.

### Employee Review Page

Usage	Use the Employee Review page to record dates and results of employee reviews and to select the rating scale.
Object Name	EMPLOYEE_REVIEW_1
Navigation	<ul style="list-style-type: none"> <li>• <b>Develop Workforce, Plan Careers, Use, Employee Review, Employee Review</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Employee Review</b></li> <li>• <b>Develop Workforce, Plan Successions (GBL), Use, Employee Review, Employee Review</b></li> </ul>
Prerequisites	Set up the rating scale.
Access Requirements	The system will prompt you for an EmplID (employee ID) and Employment Rcd Nbr (employment record number).

Employee Review
Reviewers
Comments
Goals

O'Flaherty, Seamus Patrick
Employee
ID: KG0005
Empl Rcd#: 0

Review Details
View All
First
1 of 1
Last

**Effective Date:** 03/30/2000

**From/To Date:** 10/01/1999 - 03/30/2000

**Business Unit:** GBR02 Sales and Marketing - UK

**Department:** KG006 Sales and Marketing - N. Ire

**Job Code:** KG0005 Sales Representative

**Review Type:** Salary

**Next Review Date:** 03/30/2001

**Company:** KG1

**Position:**

**Rating Scale:** PSCM Competency Management Scale

**Rating Model:** PSCM Competency Management Scale

**Review Rating:** 4 4-Very Good

Employee Review page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: (employee) **ID**, **Empl Recd#**, **Effective Date**, **Business Unit**, **Company**, and **Department**.

The system displays the employee's name, employment status, ID, and record number.

**Review Details**

**Review Type**

Select a review type. Valid values are the following:

**Both:** Select this value if the review is both a Salary and a Performance review.

**Empl Fdbck** (employee feedback)

**Initl Rtnng** (initial rating)

**Intrm Rtnng** (interim rating)

**Offcl Rtnng** (official rating)

**Performance**

**Salary**

**Self Assmt** (self assessment)

If you have defined a review result distribution for this employee's group, you will not be able to change the review type.

**From/To Date**

Enter the beginning and ending date of the review period.

**Next Review Date**

Enter the next review date if you know it.

**Position**

The system displays the employee's position as of the review date.

**Job Code**

The system displays the employee's job code as of the review date.

**Review Results Details**

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

<b>Average</b>	<b>Summation</b>	<b>Review Band</b>
Rating Scale	Rating Scale	Rating Scale
Scale Type	Scale Type	Scale Type
Rating Model	Rating Model	Rating Model
Review Rating	Total Review Points	Resulting Review Band
	Total Review Amount	Final Review Band
	Total Review Salary Points	Status
	Total Review Percent	Loaded to Job
	Status	

<i>Average</i>	<i>Summation</i>	<i>Review Band</i>
	Loaded to Job	

**Review Results Details Field Definitions**

**Rating Scale**

Select a review rating scale from the valid values, which you set up on the Rating Scale Table setup page.

If the rating scale type is Average, the system issues a warning message if the salary matrix scale associated with the rating scale you select does not match the salary matrix associated with the rating scale on the employee’s Job record.

If the rating scale type is Summation, the system issues a warning if the rating scale does not match the rating scale in the employee’s Job record.

If you have defined a review result distribution for this employee’s group, the **Rating Scale** populates from the Review Result Distribution setup page and you will not be able to change the rating scale on this page.

**Scale Type**

The system displays the scale type of the rating scale that you select.

The system issues a warning if the scale type of the rating scale that you select is different from the scale type of the scale associated with the employee’s compensation record.

**Rating Model**

The system displays the rating model you associated with the rating scale, and the description of the rating mode.

**Review Rating**

This field is visible only if the rating scale type is Average.

Select a review rating. The system issues a warning if the figure you enter here is not equal to the rounded, weighted average on the Reviewers page.

**Resulting Review Band**

If the rating scale type is Review Band, the system enters the review band into which the employee’s total review rating points fall. You can change the Resulting Review Band if desired. If you change this value, the system enters the new value in the **Final Review Band** field when you save the page.

**Final Review Band**

If the rating scale type is Review Band, the system enters the review band into which the employee’s total review rating points fall. If you change the Resulting Review Band, the system updates the Final Review Band.

- Total Review Points** The system calculates and enters here the total review points from the Reviewers page.
- Total Review Amount, Total Review Percent or Total Review Salary Points** Depending on the resolution of rating points that you specified on the rating scale, the system calculates and displays either the **Total Review Amount, Total Review Percent, or Total Review Salary Points** as the result of the review.
- Status** (For Summation and Review Band scales only.)  
 Select the status of this review. The system enters **Proposed** as the initial value. Valid values for this field are **Approved, Ineligible, No Increase, Processed, and Proposed**. You must change the status to **Approved** before the salary change will load to the Job Data records for the employee.
- Loaded to Job** (For Summation and Review Band scales only.)  
 The system selects **Loaded to Job** after you load changes to the Job record by running the Review Results to Job Data process.

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For more information about loading review results to Job, see Running the Review Results to Job Data Process.

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## Employee Review - Reviewers Page

Usage	Each reviewer uses the Reviewers page to conduct the employee review.
Object Name	EMPLOYEE_REVIEW_2
Navigation	<ul style="list-style-type: none"> <li>• <b>Develop Workforce, Plan Careers, Use, Employee Review, Reviewers</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Reviewers</b></li> <li>• <b>Develop Workforce, Plan Successions (GBL), Use, Employee Review, Reviewers</b></li> </ul>
Prerequisites	None
Access Requirements	Enter an employee ID.

Employee Review - Reviewers page



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

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: (employee) **ID**, **Empl Rcd#**, **Effective Date**, and **Business Unit**.

The system displays the employee’s name, status, ID, and record number.

**Review Details**

**Job Code**

The system displays the Job Code that you entered on the Employee Review page

**Next Review Date**

The system displays the Next Review Date that you entered on the Employee Review page

**Salary Administration Plan**

The system enters the employee’s salary plan, grade, and step.

**Reviewers**

**Evaluation Type**

Select an evaluation type. Valid values are *Approved/Official, Subordinate, Customer, Executive Committee, Mentor, Peer, Supervisor/Manager, and Self.*

**Reviewer ID**

Select the reviewer’s ID. The system displays the reviewer’s name.

**Factor Weight**

Enter the weighting percent for this reviewer. The total weight of all reviewers for a review date must be 100%.



Click the **Order by Competency** button to refresh the Competencies grid.

**Competencies**

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

<b>Average</b>	<b>Summation</b>	<b>Review Band</b>
Competency	Competency	Competency
Weight (%)	Rating	Rating
Rating	Points	Points
Total Percent	Total Review Points	Total Review Points
Weighted Average		

**Competencies Field Definitions**

**Competency** The system enters the competencies you defined for the rating scale on the Rating Scale table. You can enter additional competencies that are specific to the employee.

**Short Desc** The system enters the short description of the competency.

**Weight (%)** (For Average scale only.) The system enters the weight percent that you assigned to the competency when you set up the rating scale. If you add a competency, enter its weight percent. The total of weight percents must be 100 percent for the employee.

**Rating** Enter the review rating you want to give the employee for this competency. Valid values are the values in the rating model that you associated with the rating scale.

**Short Desc** The system enters the short description of the rating from the rating model table.

**Points** (For Summation and Review Band scales only.)  
The system enters the points you assigned to the rating for this competency on the Ratings and Points setup page.



Click the **EE Review Rating Comment** button to access the Reviewer's Comment page, where you can enter comments about the review rating for this competency.

**Total Percent** (For Average scale type only.)

The system enters the total of the competency weights. The total must be 100 percent.

- Weighted Average** (For Average scale type only.)

The system displays the sum of the competency ratings multiplied by their weight percents.
- Total Review Points** (For Summation and Review Band scales only.)

The system displays the total of review points for this reviewer for all of the competencies.
- Review Totals**

  - Weight (%)** The system displays the total percent of reviews completed. For example, if reviewer 1 has 50 percent weight and reviewers 2 and 3 each have 25 percent weight, this field will show 75 percent after reviewers 1 and 2 have completed their reviews.
  - Total Review Points** (For Summation and Review Band scales.)

The system displays the total review points for the reviews completed so far.
  - Review Result**

To calculate the review result, the system multiplies the total review score for each reviewer by the reviewer weight (taken as a percentage), and sums these weighted review scores.

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

**Employee Review - Reviewers: Comment Page**

Usage	Each reviewer can use this page to enter comments about an individual competency.
Object Name	EMP_RVW_RATING_SEC
Navigation	Click the button at the end of the grid row for the competency that you want to comment on.

The screenshot shows a dialog box titled 'Comment:'. It contains a large text input field with a vertical scrollbar on the right side. Below the text field are two buttons: 'OK' and 'Cancel'.

Employee Review - Reviewers: Comment page

Enter your comments. Click **OK** to return to the Reviewers page.

## Employee Review - Comments Page

Usage	Each reviewer can use the Comments page to enter comments about the overall review. The same reviewer can record comments related to reviews for different evaluation types. You can enter comments of any length.
Object Name	EMPLOYEE_REVIEW_3
Navigation	<ul style="list-style-type: none"> <li>• <b>Develop Workforce, Plan Careers, Use, Employee Review, Comments</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Comments</b></li> <li>• <b>Develop Workforce, Plan Successions (GBL), Use, Employee Review, Comments</b></li> </ul>
Prerequisites	None
Access Requirements	Enter an employee ID.

Employee Review - Comments page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: (employee) **ID**, **Empl Rcd#**, **Effective Date**, and **Business Unit**.

The system displays the employee's name and status.

The system displays the following information from the Employee Review and Reviewers pages: **Next Review Date**, **Salary Plan/Grade/Step**, and **Job Code**.

**Reviewers**

**Evaluation Type** Select an evaluation type. Valid values are *Approved/Official, Subordinate, Customer, Executive Committee, Mentor, Peer, Supervisor/Manager, and Self.*

**Reviewer ID** Select your reviewer ID. The system displays the corresponding name.

**Comments** Enter comments of any length.

---

**Employee Review - Goals Page**

Usage	Use the Goals page to review or specify employee goals and objectives. If the employee has a career plan in PeopleSoft Human Resources, you can choose to include short-term goals and objectives from the career plan. Type in any other goals and objectives resulting from the employee review. You can enter text longer than the displayed field space.
Object Name	EMPLOYEE_REVIEW_4
Navigation	<ul style="list-style-type: none"> <li>• <b>Develop Workforce, Plan Careers, Use, Employee Review, Goals</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Goals</b></li> <li>• <b>Develop Workforce, Plan Successions (GBL), Use, Employee Review, Goals</b></li> </ul>
Prerequisites	None
Access Requirements	Enter an employee ID.

Employee Review | Reviewers | Comments | Goals

O'Flaherty, Seamus Patrick Employee ID: KG0005 Empl Rcd#: 0

**Review Details** View All First 1 of 1 Last

Effective Date: 03/30/2000 Next Review Date: 03/30/2001  
 Business Unit: GBR02 SAM Salary Administration Plan: KG01 06  
 Job Code: KG0005 SREP

Include From Career Plan

*Nbr	Goal	*Status	Actual Completion Date
1	Close a deal in 15 days	Met	02/09/2000

Employee Review - Goals page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: (employee) **ID**, **Empl Rcd#**, **Effective Date**, and **Business Unit**.

The system displays the employee’s name and status.

**Review Details**

The system displays the following information from the Employee Review and Reviewers pages: **Next review Date**, **Salary Plan/Grade/Step**, and **Job Code**.

**Goals**



Click the **Refresh IDs** button to load the goals from the employee’s career plan.

**Nbr** (number)

Enter the sequence number for goals that you add.

**Goal**

The system displays goals that you load from the employee’s career plan. You can enter goals.

**Status**

Select a goal status. Available values are *Exceeded*, *Met*, and *Not Met*.

**Actual Completion Date**

If the Goal Status is *Exceeded* or *Met*, enter the date on which the employee achieved the goal.

When you select a status of *Met* and the goal is also in the employee career plan, the system enters this date for short-term goals in the Actual Completion Date field in the Career Goals page. But keep in mind that if you change this information a second time, for example, change a met goal back to unmet, the system does not update the information in the employee career plan again—you’ll need to update the date in the career plan manually.



For more information about career goals and plans, see [Creating Career Plans](#).

**Employee Review by Group Page**

Usage	Use the Employee Review by Group page to view a list of all employees in a review group during the current review period defined for the group. From this page you can access the Employee Review page for each employee.
Object Name	EE_REVIEW_GRP

Navigation	<ul style="list-style-type: none"> <li>• <b>Develop Workforce, Plan Careers, Use, Employee Review By Group, Employee Review By Group</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Use, Employee Review By Group, Employee Review By Group</b></li> </ul>
Prerequisites	None
Access Requirements	Enter a Group ID.

Employee Review By Group

**Group ID:**    KU002                      KU002

---

1 to 11 of 11                      << < > >>                      **Total in Group:**    11                     

Group Employees			
EmplID	Empl Rcd#	Name	EE Review
K0G002	0	Nichta,Issac	<a href="#">EE Review</a>
K0G004	0	Aquilino,Beatrice	<a href="#">EE Review</a>
K0G006	0	Puddephatt,Leo	<a href="#">EE Review</a>
K0G009	0	Hunsberger,Carlton	<a href="#">EE Review</a>
K0G010	0	Bickham,Debroah	<a href="#">EE Review</a>
KU0031	0	Tipman,Scott	<a href="#">EE Review</a>
KU0058	0	Votava,Teresa	<a href="#">EE Review</a>
KU0104	0	Dewberry,Kitty	<a href="#">EE Review</a>
KU0114	1	Dell,Emmylou K	<a href="#">EE Review</a>
KUTR02	0	Gardner,John	<a href="#">EE Review</a>
KUTR05	0	Masterson,Marie	<a href="#">EE Review</a>

Employee Review By Group page

**Group ID**    The system displays the Group ID you entered when you accessed the page.

**Total in Group**    The system displays the total number of members in the group.

**Get Group**    Click the **Get Group** button to load the list of group members into the page. Use the navigation buttons to display portions of the group at a time.

**Group Employees**

**EmplID**    The system displays each group member’s employee ID number.

**Empl Rcd#**    The system displays each group member’s employment record number.

**Name**    The system displays each group member’s name.

**EE Review** (employee review)

Click **EE Review** to go to the employee’s Employee Review page.

---

For more information about the employee review page, see [Employee Review Page](#).

---

## Viewing Employee Review Information

PeopleSoft Plan Salaries provides four inquiry pages for reviewing employee review information. Even if you do not define a desired review result distribution, you can use the Review Result Distribution inquiry pages to view the distribution of review results for your review groups.

---

### EE With No Current Review Inquiry Page

Usage	Use the EE with no Current Review (employee with no current review) page to identify employees who have not been reviewed during the review period that you identify on this page. This is important if you have defined a review result distribution. The review result distribution will not be reliable unless everyone in the group has received a review.
Object Name	EE_NO_CURR_RVW_INQ
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, EE with no Current Review, EE with no Current Review</b>
Prerequisites	None
Access Requirements	Enter a group ID.

EE with no Current Review

**Group ID:** KU002                      KU002

**Parameters**

**Start Date:** 10/01/1999   **End Date:** 11/30/1999   **Review Type:** Salary

1 to 10 of 10                      Total in Group: 10                     

**Employees with no Current Review**                      First 1-10 of 10 Last

EmpID	Business Unit	Rcd#	Name	Company	Department	Job Code	Position Number	Sal Plan	Grade
K0G002		0	Nichta,Issac						
	GBIBU	GBIBU		GBI	KU002	Benefits	KU014	KU01	004
K0G004		0	Aquillino,Beatrice						
	GBIBU	GBIBU		GBI	KU002	Benefits	KU013	KU01	005

EE with no Current Review page

**Group ID** The system displays the group ID you entered when you accessed the page.

**Parameters**

**Start Date** Select the beginning date of the review period you are checking. Dates entered in the From Date field on the Employee Review page are the only values available.

**End Date (through date)** Select the ending date of the review period you are checking. Dates entered in the To Date field on the Employee Review page are the only values available.

**Review Type** Select the review type that you are checking in this review period. Valid values are *Approved/Official, Subordinate, Customer, Executive Committee, Mentor, Peer, Supervisor/Manager, and Self.*



Click this button to refresh the list of employees who have not had a review of the specified review type in the defined review period.

**Total in Group** The system displays the total number of members in the group.

**Get Group** Click the **Get Group** button to refresh the employees in the group.

**Employees With No Current Review**

The system displays the following data from the employee’s Job record: **EmplID, Name, Business Unit, Rcd#** (record number), **Company, Department, Job Code, Position Number, Salary Plan, and Grade.**



For more information about these fields, see Hiring Your Workforce.

**EE Review Result Distribution Inquiry Page**

Usage	Use the EE Review Result Distribution (employee review result distribution) page to view each employee’s review result and the group’s desired result distribution, the actual distribution, and the variance.
Object Name	EE_REVW_RESLT_INQ
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, EE Review Result Distribution, EE Review Result Distribution</b>
Prerequisites	Define a review result distribution on the Review Result Distribution setup page.

Access Requirements	Enter a group ID.
---------------------	-------------------

EE Review Result Distribution

Group ID: KU002      KU002

No Items Found           Total in Group: 8     

Review Distribution	
<b>Effective Date:</b> 01/01/2000	KU002 - Summation Review Result Dist
<b>Review Type:</b> Salary	<b>Rating Scale:</b> Amount Rat <b>Rating Model:</b> Exempt
<b>Budget ID:</b>	<b>Salary Matrix Code:</b> KUNEX

Employee Review Result				
EmpID	Name	Review Rating	Short Desc	EE Review
				<a href="#">EE Review</a>

Desired Review Distribution						
Group	From	To	Amount	People	Desired Dist	Actual Variance
1	1	10		100.000000	0	80.00    0    -80
2	11	20		200.000000	0	20.00    0    -20

EE Review Result Distribution inquiry page



Column order for grids may vary by implementation.

**Group ID**      The system displays the group ID you entered when you accessed the page.

**Count of Records**      The system displays the number of records that meet the criteria.

**Total in Group**      The system displays the number of employees in the group.

**Get Group**      Click the **Get Group** button to refresh the eligible group members. Use the **Previous** and **Next** buttons to view chunks of group members.

**Review Distribution**

**Effective Date**      The system displays the effective date and description of the Review Result Distribution that you defined for the group.

The system loads into this page the current review results as of the current date for all employees in the group.

**Review type**      Select the review type.

**Rating Scale**      The system displays the rating scale you associated with this group, effective date, and review type.

**Budget ID** If you specified a budget ID when you defined the review result distribution, the system displays the budget ID.

**Salary Matrix Code** If you specified a Salary Matrix when you defined the review result distribution, the system displays the salary matrix code.

### **Employee Review Result**

The fields that are visible in this section vary depending upon the rating scale you used to review the employee. Only the Final Review Band field is updateable; all other fields are for display only.

**EmplID** The system displays the employee's ID number.

**Name** The system displays the employee's name.

**Review Rating** (Average scale type.)

The system displays the employee's review rating.

**Short Description** (Average scale type.)

The system displays the short description of the review rating.

**Final Review Band** (Review Band scale type.)

The system displays the employee's final review band. You may change this value for individual employees to achieve the desired review result distribution. When you save this page, the system updates the Final Review Band field on the Employee Review page, but leaves the Resulting Review Band field unchanged on that page.

**Total Review Salary Points** (Summation scale type with resolution of review points into salary points.)

The system displays the employee's total salary points resulting from the review.

**Total Review Percent** (Summation scale type with resolution of review points into percent.)

The system displays the employee's total percent resulting from the review.

**Total Review Amount** (Summation scale type with resolution of review points into amount.)

The system displays the employee's total amount resulting from the review.

**EE Review**

Click this link to return to the Employee Review page where you can make adjustments in the employee’s review results.

**Desired Review Distribution**

The system displays the review results in the Desired Review Distribution grid according to the rating scale and method of resolving review points, as detailed in the previous grid. In addition, it displays the following information:

<b>Group</b>	<p>The system displays the groups of point ranges as you defined them on the Merit table.</p> <p>This field is hidden if the rating scale type is Average.</p>
<b>From</b>	<p>The system displays the beginning result value in the point range for this group.</p> <p>This field is hidden if the rating scale type is Average.</p>
<b>To</b>	<p>The system displays the final value in the range for this group.</p> <p>This field is hidden if the rating scale type is Average.</p>
<b>People</b>	<p>The system displays the number of people in this group (Summation scales), review band (Review Band scales), or the number of people who achieved this review rating (Average scales).</p>
<b>Desired Dist</b> (desired distribution)	<p>The system displays the percent distribution that you defined for this level of performance when you defined the review result distribution. If you did not define a desired distribution for the group, the system enters 0.</p>
<b>Actual</b>	<p>The system displays the actual review result distribution.</p>
<b>Variance</b>	<p>The system displays the variance between the desired distribution and the actual distribution. If you did not define a desired distribution for the group, the system enters 0.</p>

---

**Review Result Distribution Inquiry Page**

Usage	Use the Review Result Distribution inquiry page to view the desired and actual review distribution of the group along with the variance. If you associated the review result distribution with a budget, you can also view the budgeted amount, actual amount, and the variance.
Object Name	RE VW _ RES _ DIST _ INQ

Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, Review Result Distribution, Review Result Distribution</b>
Prerequisites	None
Access Requirements	Enter a group ID.

Review Result Distribution

Group ID: KU005      KU005

From Date: 01/01/2000      Thru Date: 12/31/2000      Review Type: Salary

**Review Distribution** View All   First 1 of 1   Last

Effective Date: 04/01/2000      KU005 - Average Review Result Dist

Rating Scale: KU01      Rating Model: KU01      Merit Scale:

Salary Matrix Code: KUNEX      Budget ID:

Desired Review Distribution					
Seq	Rating	People	Desired Dist	Actual	Variance
1	1	0	10.00	0	-10
2	2	0	20.00	0	-20
3	3	0	60.00	0	-60
4	4	0	10.00	0	-10
5	5	0	0.00	0	
6	6	0	0.00	0	
7	7	0	0.00	0	

Budget		
Budget:	Actual Amount:	Variance:

Review Result Distribution page



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

**Group ID**      The system displays the group ID you entered when you accessed the page.

**From Date**      Select a review **From Date**. Valid values are the review dates you defined on the Employee Review page.

**Thru Date**      Select a review **Thru Date**. Valid values are the review dates you defined on the Employee Review page.

**Review Type**      Select a review type.



Click the **Search** button to load the review result distribution information into the grid. You must first select the **Group ID**, **From and Thru Dates**, and **Review Type** parameters.

**Review Distribution**

- Effective Date** If more than one review took place within the date parameters, select the review result distribution for this group that you want to view in this page.
- Rating Scale** The system displays the rating scale that you defined for this review result distribution.
- Rating Model** The system displays the rating model that you defined for this review result distribution.
- Merit Scale** The system displays the merit scale that you defined for this review result distribution.
- Salary Matrix Code** The system displays the salary matrix code that you defined for this review result distribution.
- Budget ID** The system displays the budget ID that you defined for this review result distribution.

**Desired Review Distribution**

The system displays the review results for each group of ratings that you defined on the merit scale, or each rating in your Average scale. The details of the fields in this grid are the same as the Employee Review Result Distribution inquiry page.

**Budget**

- Budget** The system displays the amount you budgeted for salary increases.
- Actual Amount** The system displays the actual amount of the salary increases for this group and this review.
- Variance** The system displays the variance between the budgeted and actual amounts.

---

**Review History Page**

Usage	Use the Review History page to track an employee’s reviews over time.
Object Name	REVIEW_HISTORY_INQ
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, Review History, Review History</b>
Prerequisites	None
Access Requirements	Enter an employee ID and Review Type.

Review History

O'Flaherty,Seamus Patrick ID: KG0005 Empl Rcd Nbr: 0

Review Type: Salary

**Employee Review**

Rating Scale Result Review Details

Eff Date	Scale	Short Desc	Scale Type	Model	Short Desc
03/30/2000	PSCM	Comp Mgmt		PSCM	Comp Mgmt

Review History: Rating Scale page

Review History

O'Flaherty,Seamus Patrick ID: KG0005 Empl Rcd Nbr: 0

Review Type: Salary

**Employee Review**

Rating Scale Result Review Details

Eff Date	Scale	Rating	Short Desc
03/30/2000	PSCM	4	Very Good

Review History: Result page

Review History

O'Flaherty,Seamus Patrick ID: KG0005 Empl Rcd Nbr: 0

Review Type: Salary

**Employee Review**

Rating Scale Result Review Details

Eff Date	Scale	Merit Scale	Short Desc
03/30/2000	PSCM		

Review History: Review Details page



The fields on this page are the same as those found on the Employee Review page. For information about these fields, see Employee Review Page.

## Processing Employee Reviews

The system provides a process to identify employees who have not received a review and to notify the appropriate managers. If you use a Summation-type rating scale, you can process salary increases based on the review results to the employees' Job records.

### Running the Late Reviews Process

The Late Reviews process is a database agent process that selects all employees who meet the following conditions:

- The last review effective date is on or before the date the process runs.
- *And* the next review date is before the date the process runs or there is no next review date assigned.

If you have Workflow enabled, this process creates a worklist entry for all managers whose employees have not yet received a review.

**Late Reviews Process Page**

Usage	Use the Late Reviews Process page to run the Late Reviews Process.
Navigation	<b>Administer Workforce, Plan Salaries, Process, Late Reviews</b>
Access Requirements	Enter a Run Control ID.

Late Reviews process page

**Run Control ID** The system displays the Run Control ID that you entered when you accessed the page.

Click **Run** to run this request. Process Scheduler runs the Late reviews process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

---

**Running the Review Results to Job Data Process**

The Review Results to Job Data process loads the following information into the employee’s Job Data record:

- Review Date.
- Summation rating scale review points.
- Monetary salary changes that result from the Summation rating scale review.

The process does not update the Job record with results of an Average or Review Band rating scale review.

### Procedure for Running the Process

Before running the Review Results to Job process, you can run the Review Result Distribution report to confirm the results that will be loaded to the Job and Compensation records.

The Review Results to Job process involves running both an Application Engine process and a Database Engine process. These two processes must be run in the correct order.

To Run the Review Results to Job Process:

1. Run the Application Engine process.
  - The process populates a temporary table with updated job and compensation data.
  - The process then creates a new compensation package in the employee’s compensation record.
2. Run the Database Agent process immediately following step 1. This process updates the employee Job records for the group you specified as the parameter for the process.

### Review Results to Job Data Page

Usage	Run the Review Results to Job Data process to update Job Data records for employees you reviewed by a Summation-type rating scale.
Object Name	RUNCTL_REVTOJOB
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Review Results to Job Data, Review Results to Job Data</b>
Prerequisites	Run this process for Summation scale types only.  This process will load records to Job Data only if the review status on the Employee Review page is <i>Approved</i> .
Access Requirements	Enter a Run Control ID.

Review Results to Job Data

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Report Request Parameter(s)

Group ID:   Department KD002

Job Effective Date:

Action:

Reason Code:   Merit

Review Results to Job Data page

<b>Run Control ID</b>	The system enters the Run Control ID you entered when you accessed the page.
<b>Group ID</b>	Select the group ID you are processing changes for.
<b>Job Effective Date</b>	Enter the date on which you want the new job row to take effect.
<b>Action</b>	Select an <b>Action</b> from the list of translate values.
<b>Reason Code</b>	Enter a <b>Reason Code</b> for your <b>Action</b> . Valid values are established on the Action Reason Table in the Administer Workforce menu.

Click **Run** to run this request. Process Scheduler runs the Review Results to Job process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

---

## Reporting on Employee Reviews

In addition to the online inquiry pages, the system provides two printed reports that summarize employee review results.

---

### Employee Review Audit

The Employee Review Audit report lists employees in the group who have completed the review process and those who have not. The report provides the following information for each employee in the group who has a completed review:

- The reviewer's name and weighting factor.
- The employee's rating scale and review rating.
- The average of the employee's review ratings over time.
- The employee's next review date.

You can use this report as a reminder to schedule interviews.



**For complete information** about this report, see Generating the Employee Review Audit Report.

---

---

## Employee Review Result Distribution

You can print the Employee Review Result Distribution report to view review results by employee along with review result distribution, review distribution variances, budget amounts, and budget variances.



**For complete information** about this report, see [Generating the EE Review Result Distribution Report](#).

---

## CHAPTER 5

# Budgeting and Planning Salary Increases

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

Create your salary plan by applying the budgeted increases to employees in the group to calculate default increases. Manually adjust individual employee's raises based on compensation history and review results. You can check the variance between the budget totals and the salary plan totals, and approve the raises when you're satisfied. After approving raises, you can load them to the employees' job data records where they take effect on the effective date you defined.

## Overview of the Salary Increase Budgeting and Planning Business Process

The following list outlines briefly the steps in the salary budgeting and planning process. The topics in this section explain these steps in further detail.

To budget and plan salary increases:

1. Create a salary increase group using group build pages.



For more information about step 1 see Planning Salary Increases by Group.

---

2. Establish default salary plan controls.
3. Set up group-level controls for specific plan periods.



For more information about steps 2 and 3 see Setting Up Controls for Salary Increase Budgets and Plans.

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4. Create requested budgets by pay component.

5. Compare proposed budgets and make adjustments.
6. Approve a budget or go directly to salary planning without approving the budget first.



For more information about steps 4 - 6 see Budgeting Group Increases.

7. Establish a salary increase plan for employees in the group based on the budget.
8. Manually adjust increases of individual employees in the group.
9. Compare salary plan figures with budget figures.
10. Finalize and approve the salary increase plan.



For more information about steps 7 - 10 see Planning Group Salary Increases.

11. Populate employee records with planned, approved increases.



For more information about step 11 see Loading Salary Changes to Compensation Records.

---

## Terms and Definitions

The following terms are used throughout the salary increase budgeting and planning pages:

<b>Salary Increase Budget</b>	A budget for increasing compensation rates for specified pay components. The budget is defined by employee group and calculates increases equally for all group members who have the budgeted rate codes in their compensation packages.
<b>Salary Increase Plan</b>	A plan for increasing the salaries of individual employees in a group. The salary increase budget forms the default salary increase for group members who have the budgeted pay components in their compensation packages. In the salary increase plan you can manually adjust the budgeted increase at the level of individual employees in the group.
<b>Requested Budget</b>	The salary increase budget as it is defined and submitted for approval on the Group Increase Budget pages.
<b>Current Budget</b>	The salary increase budget as it is adjusted by the approver. The system uses the current budget for variance calculations in salary planning by group.

---

## Planning Salary Increases by Group

You create your salary increase budgets and plans by employee groups. You can define employee groups by department, by job code, or by any other criteria that suit your salary planning needs. After you set up your group's default budget, you use the group ID as the highest level key in all of the salary budgeting and planning pages.

### Defining Salary Plan Groups

You define employee groups using pages in the Manage Human Resources menu. You can define groups specifically for salary budgets and plans, or use employee groups that you have defined for other purposes in your organization.



For more information about defining groups, see Working With Groups.

---

## Setting Up Controls for Salary Increase Budgets and Plans

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

---

### Overview of Plan Defaults

The following steps outline the procedures for setting up default controls and the purpose and function of the defaults created in each step.

To set up default controls for salary increase budgets and plans:

1. Define plan default IDs on the Plan Default Table page.

In this step you name the plan default IDs. The plan default ID is the key you will use to access the Salary Plan Default Values page in the next step.

2. Define plan default control values on the Salary Plan Default Values page.

The plan default ID you create in step 1 is the key that identifies the set of default values that you create in this step. On this page you define default budget and salary increase plan control dates, currency defaults, the level of proration, the salary increase method, and eligibility dates. You use this set of control values as a starting point for defining group level controls in the next step.

3. Define budget and salary increase plan default control values at the group level on the Sal Plan Group Default Values page.

You enter this page by specifying a group ID. In the page you select a plan default ID (step 1) to populate this page with values you associated with the ID in step 2. Even if you don't change any of the default values for the group, you must open the Sal Plan Group Default Values page and save the data before you can create salary increase budgets or plans for the group.

The values you save on this page are the default control values the system enters on the Group Increase Budget page and Salary Planning by Group page when you establish salary increase budgets and plans for this group.

### Administering Plans by Employee Anniversary Date

If you select Employee Anniversary Date as the salary increase method on the Salary Plan Group Default Values page, use the following guidelines when setting up the group increase budget:

- The budget period must be an entire year. For example, if the budget start date is 4/1/2000, the budget period end date must be 3/31/2001.
- You can define only one increase in the budget. (You cannot define multiple increases by effective date and effective sequence if administration is by employee anniversary date.)
- The effective date of the budget increase must be the same as the budget period start date. The employee's anniversary date will be the effective date of the increase in the employee's job data row.
- Run the Create/Refresh Anniversary Dates process before loading the increases to Job data.

---

### Plan Defaults Table Page

Usage	Use the Plan Defaults Table page to define an ID code that you will use as a key to a set of salary increase plan default values that you will set up on the Salary Plan Default Values page.
Object Name	CONTROL_TBL
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Setup, Plan Default Table, Plan Defaults Table</b>
Prerequisites	None
Access Requirements	Enter a Plan Default ID

Plan Defaults Table

**Plan Default ID:** KD1

Description		View All	First	1 of 1	Last
<b>*Effective Date:</b>	01/01/1980	<b>*Status:</b>	Active		
<b>*Description:</b>	Plan Default 1				
<b>Short Description:</b>	Def 1				

Plan Defaults Table page

**Plan Default ID** The system displays the plan default ID you entered when you accessed the page.

**Description**

**Effective Date** Enter the date on which you want this plan default ID to be effective.

**Status** Select a status.

**Description** Enter a description of the plan default ID that you are creating.

**Short Description** Enter a short description of the plan default ID that you are creating.

---

**Salary Plan Default Values Page**

Usage	Use the Salary Plan Default Values page to define default budget and salary increase plan control dates, currency defaults, the salary increase method, eligibility dates, and salary increase effective date.  Use the default values you set up here when you define salary increase plans for employee groups.
Object Name	SAL_PLAN_CONTROL
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Use, Salary Plan Default Values, Salary Plan Default Values</b>
Prerequisites	Define a Plan Default ID on the Plan Default Table.
Access Requirements	Enter a Plan Default ID.

Salary Plan Default Values		
<b>Plan Default ID:</b>	KD1	Plan Default 1
Default Values		
*Budget Period Start Date:	04/01/2000	(Increases effective between these dates)
*Budget Period End Date:	03/31/2001	
*Salary Planning Start Date:	04/01/2000	(As of date for base salaries)
*Currency Code:	USD	US Dollar
Level of Proration:	M	Monthly
*Default Rate Type:	OFFIC	Official Rate
Salary Increase Method		
<input checked="" type="radio"/> All Employees at the Same Time		<input type="radio"/> Employee Anniversary Date
Eligibility Dates		
New Hire Eligibility Date:	04/01/2000	(Cutoff for inclusion in plan)

Salary Plan Default Values page

**Plan Default ID** The system displays the **Plan Default ID** you entered when you accessed the page. It also displays the description.

**Default Values**

**Budget Period Start Date** Enter the beginning date of the budget plan’s effective period.

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

**Salary Planning Start Date** Enter the salary planning start date. The system uses salary amounts in the system as of the **Salary Planning Start Date** as the basis for its calculations for new increases.

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

**Level of Proration** The system displays budget and salary plan calculations in the frequency that you select here. The available values are from the Frequency table.

**Default Rate Type** Select the Rate Type that you want the system to enter as the default for your salary increase plans. Valid values are the exchange rate types you previously established on the Currency Rate Type table. The system uses this rate type for all currency conversions.

### Salary Increase Method

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

**All Employees at the Same Time**

Select this option if you want all salary increases under your salary plans to be implemented for all employees at the same time. If you select this option, the **New Hire Eligibility Date** field becomes available for data entry. The effective date of the employees' salary increases will be the effective date you define for the increase on the Budget Requested page.

**Employee Anniversary Date**

Select this option if you want salary increases under your salary plans to be implemented on the employee's anniversary date. The anniversary date can be the employee's hire or rehire date. If you select this option, the **New Hire Eligibility Date** field becomes unavailable for data entry.

If you select this option, your budget period must be an entire year and the effective date of the budget must be the budget period start date. You can define only one increase in the budget. You also need to run the Create/Refresh Anniversary Dates process before loading salary increases to the job record.

---

For more information about anniversary dates, see *Administering Plans by Employee Anniversary Date*.

---

### Eligibility Dates

**New Hire Eligibility Date**

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

Enter the cutoff point for employees to be included in the plan. Any employees hired after this date will not appear in the budget or plan. This date must be prior to the **Salary Planning Start Date**.

---

### Sal Plan Group Default Values Page

Usage	Use the Sal Plan Group Default Values page to establish default control values for salary increase budgets and plans that you set up for a particular group ID. The system populates this page with the default
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The system populates the remaining fields on this page with values from the Salary Plan Default Values page; the fields are identical. You can change the values if you want to set up different defaults for this group. When you have reviewed all dates and values, save the information.



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

---



For more information and complete documentation of these fields, see Salary Plan Default Values Page.

---

## Budgeting Group Increases

Before you can create a salary increase plan for an employee group, you first set up a group increase budget. To request a budget you enter the requested amount, percent, or points by base rate code. The system calculates the requested budget and current budget automatically. It calculates the increase for all group members who have the rate code in their compensation package.

You define budgets by effective date, effective sequence, and action/action reason. This structure matches the job key structure and enables you to perform multiple actions on the same rate code on the same date for the same action reason. Budgeting by effective date also enables you to budget for different action/action reason combinations that take effect on different dates within the same budget.



If the plan specifies salary increases by Anniversary Date, you can only define one increase in the budget, which must have the budget period start date as the effective date. The effective date in the job record will be the employee's anniversary date.

---

You can create multiple requested budgets (with distinct IDs) for the same group and budget period and compare them on the budget inquiry pages, but you can approve only one budget for a single group and budget period start date.

After you create your requested budget you can send it for approval or use it directly for planning employee salary increases. The approver can make changes in the budget before approving it.

---

### Overview of Salary Increase Budgeting Procedures

The following steps outline how you use the Group Increase Budget pages, the Budget Calculation process, and the Budget Comparison Inquiry pages. Notice that you have the following choices in how you use these pages:

- You can calculate a budget using either online processing in the Group Increase component

pages or the Budget Calculation batch process. You'll want to use the batch process if your group is very large.

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

To establish a salary increase budget for a group:

1. Create a group using group build pages.



For more information about creating groups, see Working With Groups.

---

2. Set up salary plan control values for the group.



For more information about setting up salary plan controls, see Setting Up Controls for Salary Increase Budgets and Plans.

---

3. Assign a budget ID and describe the budget on the Group Increase Budget - Budget Description page.

You can set up a number of different budgets with distinct budget IDs for the same group in the same budget period and compare these budgets in the Budget Comparison Inquiry pages. You can approve only one budget for a single group and budget period start date.

4. Define the effective date, sequence, action, and action reason, for the budget increase on the Group Increase Budget - Budget Requested page.
  - You can perform multiple actions on the same rate code on the same effective date for the same action reason.
  - You can budget for different action/action reason combinations that take effect on different dates within the same budget. (Do not do this if the increases are administered by Anniversary Date.)
5. Enter salary increases by rate code on the Group Increase Budget - Budget Components page.
6. Calculate the requested and current budget amounts by clicking the Calculate button on either the Budget Components page or the Budget Requested page, or by running the Budget Calculations application engine process. If your group is large, you'll want to use the application engine process.
  - The system enters the calculated totals of the requested budget in the Requested and Current rows on the Budget Requested page.

7. Submit the budget for approval by clicking the Request Approval button on the Budget Requested page.
8. Compare budgets (if you created more than one budget for the same group and budget start date) on the Budget Comparison Inquiry pages.
  - Select budgets to compare from a list of all budgets for the group and budget start date on the Budget Comparison - Budgets page.
  - Select a budget and view its variance compared to others on the Budget Comparison - Comparison page.
  - View the selected budget's details at the rate code level on the Budget Comparison - Components page.
9. Approve the budget without modification by selecting the Budget Approved check box on the Budget Comparison - Comparison page.
10. Modify the current budget, approve it, or use it for salary planning without approving.
  - To modify the budget, change the values in the Current Budget grid on the Budget Components page.
  - To approve the budget, select Budget Approved on the Budget Requested page.
11. Use the approved or unapproved budget as the basis for creating a salary increase plan.



For more information about creating a salary increase plan, see Planning Group Salary Increases.

---

## Establishing Group Increase Budgets

Use the Group Increase Budget pages to define budgets for a group and budget period. The following table summarizes how you use the three pages in this component.

<b>Page Name</b>	<b>Function</b>
Budget Description	Assign a budget ID and enter a description of the budget.
Budget Requested	Define the effective date, sequence, actions, and action reasons. View requested and current budget totals. Submit a budget for approval. Approve a budget.
Budget Components	Define requested increases by rate code in the Requested Budget section. Modify the increases by rate code in the Current Budget section.



For more information about salary increase budgeting procedures, see [Overview of Salary Increase Budgeting Procedures](#).

## Standard Field Definitions for the Group Increase Budget Component

The following fields are common to all of the Group Increase Budget pages.

<b>Group ID</b>	The system enters the ID and description of the group you entered when you accessed the page.
<b>Budget Period</b>	The system displays the control dates you set up for the group in the Sal Plan Group Default Values page.
<b>Level of Proration</b>	The system displays the level of proration you set up for the group in the Sal Plan Group Default Values page.
<b>Budget ID</b>	The system displays the <b>Budget ID</b> you entered when you accessed the page.
<b>Total Count</b>	The system displays the total count of employees in the group as of the salary plan start date.
<b>FTE (full time equivalency)</b>	The system displays the FTE for the group as of the salary plan start date.
<b>Total Annual Salaries</b>	The system displays the total salaries of group members as of the salary plan start date in the currency you selected on the Sal Plan Group Default Values page. The currency code is displayed. This amount is the base for calculating the requested and current budget percent and amount.

The **Total Annual Salaries** value is the sum total of salaries of employees who meet the following criteria:

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

### Group Increase Budget - Budget Description Page

Usage	Use the Budget Description page to assign a Budget ID and describe a salary increase budget for a group of employees. You can set up a number of different budgets with distinct budget IDs for the same group in the same budget period. You can compare these budgets in the Budget Comparison Inquiry pages.
Object Name	GROUP_INCR_BUDGET1
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Use, Group Increase Budget, Budget Description</b>
Prerequisites	Set up group default values on the Sal Plan Group Default Values page.
Access Requirements	Select a Group ID and Budget Period Start Date. Enter a Budget ID.

Budget Description		Budget Requested		Budget Components	
Group ID:	KU005	KU005			
<b>Budget</b>					
Budget Period:	04/01/2000 - 03/31/2001		<input type="button" value="Get Group"/>		
Level of Proration:	Monthly				
Budget ID:	KU005-B1				
*Description:	<input type="text" value="KU005 - Budget 1"/>				
Short Description:	<input type="text" value="KU005-B1"/>				
<b>Group Default Values</b>					
Salary Planning Start Date:	04/01/2000	New Hire Eligibility Date:	04/01/2000		
<b>As of Salary Plan Start Date</b>					
Total Count:	20	FTE:	11.25	Total Annual Salaries:	846,292.76 USD

Group Increase Budget - Budget Description page

The following fields are common to multiple pages in this component and are defined under the Standard Field Definitions for the Group Increase Budget Component: **Group ID, Budget Period, Budget ID, Level of Proration, Total Count, FTE, and Total Annual Salaries.**

### Retrieving Group Information

#### Get Group

Click the **Get Group** button to retrieve or refresh the **Total Count, FTE, and Total Annual Salaries** information for this group ID.

#### Budget

##### Description

Enter a description of the Budget you are defining. This description can be up to 50 characters in length.

##### Short Description

Enter a short description.

### Group Default Values

**Salary Planning Start Date** The system displays the Salary Planning Start Date you set up for the group in the Sal Pan Group Default Values page.

**New Hire Eligibility Date** If you're administering salaries by the All Employees at the Same Time method, the system displays the New Hire Eligibility Date you set up for the group in the Sal Pan Group Default Values page.

### Group Increase Budget - Budget Requested Page

Usage	Use the Budget Requested page to define the action and action reason for the budget and to view requested and current budget totals. You can also use this page to submit a budget for approval, to modify and approve the budget, and to approve the salary plan associated with the budget.
Object Name	GROUP_INCR_BUDGET2
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Use, Group Increase Budget, Budget Requested</b>
Prerequisites	None
Access Requirements	Select a Group ID, Budget Period Start Date, and Budget ID.

Budget Description		Budget Requested		Budget Components	
<b>Group ID:</b>	KU005	KU005	<b>Budget ID:</b>	KU005-B1	<b>Level of Proration:</b> Monthly
<b>Budget Period:</b>	04/01/2000 - 03/31/2001				
<b>Budget</b> <span style="float:right">View All First 1 of 2 Last</span>					
<b>*Effective Date:</b>	10/01/2000	<b>Seq:</b>	0		
<b>*Action:</b>	Pay Rtg Chg	<b>Reason:</b>	MER Merit	Request Approval	
<b>Budget Manager:</b>		<b>Rcd#:</b>	0		
	Percent	Amount	Date	<b>Budget Approved</b> <input type="checkbox"/>	
<b>Requested:</b>	0.70	71,521.649		Grand Totals	
<b>Current:</b>	0.70	71,521.649		<b>Amt:</b>	71,024.397000
<b>Planned Increases:</b>	0.71	497.25		<b>%:</b>	0.70
<b>Variance:</b>	0.01	-997.25		<b>Salary Plan Approved</b> <input type="checkbox"/>	
<b>As of Salary Plan Start Date</b>					
<b>Total Count:</b>	20	<b>FTE:</b>	11.25	<b>Total Annual Salaries:</b>	846,292.76 USD

Group Increase Budget - Budget Requested page

The following fields are common to multiple pages in this component and are defined under the Standard Field Definitions for the Group Increase Budget Component: **Group ID, Budget Period, Budget ID, Level of Proration, Total Count, FTE, and Total Annual Salaries.**

## Budget

- Effective Date** Select an effective date for the action and action reason associated with this budget.
- The effective date enables you to budget for different action/action reason combinations that take effect on different dates within the same budget.
- By using the **Seq** (sequence number) in association with the **Effective Date** and **Action Reason**, you can perform multiple actions on the same rate code for the same effective date and same action reason.
- 
- Note.** If you administer salary increases by Employee Anniversary Date under the plan, you can only define one increase in the budget, which must have the salary plan start date as the effective date.
- 
- Seq** If you enter an additional **Action** with the same effective date and action reason, increase the sequence number by one integer. The system assumes the first action to have a sequence number of *0*, so enter a sequence number of *1* for your second use of the same action code for the same effective date and action reason.
- Action** Select an **Action** that is associated with this budget. Valid values for this field include *Demotion*, *Pay Rt Chg* (pay rate change), *Posn Chg* (position change), and *Promotion*.
- Reason** Select a **Reason** from the valid list of Action Reason Code values, established on the Action Reason Code table.
- Budget Manager** The system enters the Manager ID defined for the group when the group was defined. You can override this ID if necessary. When you enter the manager ID, the system automatically updates the **Rcd#** (record number) with the manager's employee record number.
- Rcd#** The system enters the employee record number of the Budget Manager you identified.



After you enter or change rate codes and increase values in the Requested Budget or Current Budget grids on the Budget Components page, click the **Calculate** button to calculate the budget and populate the **Requested** and **Current Percent** and **Amount** fields on this page.

The system calculates the total for the group based on the following data:

- Increases in employees' compensation rate codes that you enter in the Budget Components page.
- Budget Period parameters you define for the budget.

<b>Request Approval</b>	<p>After you complete the budget calculation, click the <b>Request Approval</b> button to send a workflow notifying the approving manager to review the budget. (Workflow must be enabled.)</p> <p>Enter the date in the <b>Requested Date</b> field.</p>
<b>Percent</b>	In this column the system displays the total percent change in salaries. It calculates this figure for the components you enter for this budget on the Budget Components page.
<b>Amount</b>	In this column the system displays the change in total salaries. It calculates this figure for the components you enter for this budget on the Budget Components page.
<b>Date</b>	<p>Enter the date that you are requesting this budget (on the <b>Requested</b> line) or approving the budget (on the <b>Current</b> line) or approving the salary plan (on the <b>Planned Increases</b> line).</p> <p>The system enters this date if you approve the budget on the Budget Comparison - Compare inquiry page.</p>
<b>Requested</b>	The information in the <b>Requested</b> line represents the amount being requested for salary increases.
<b>Current</b>	The information in the <b>Current</b> line represents the budget as revised by the approver on the Budget Components page. This is the amount available for distribution to group members on the Propose Raises page.
<b>Planned Increases</b>	The system displays the total increases you define in the salary increase plan associated with this budget. All amounts are displayed in the budget currency and frequency.
<b>Budget Approved</b>	<p>To approve the budget, the approving manager first enters the <b>Date</b> on the <b>Current</b> budget row and then selects <b>Budget Approved</b> when satisfied with all of the budget figures.</p> <p>The system selects this check box if you approve a budget on the Budget Comparison - Compare inquiry page.</p> <p>Only one approved budget can exist at one time for a single group and budget period start date.</p> <hr/> <p>For more information about budget approval and approval validation, see Approving a Budget.</p> <hr/>
Grand Totals	
<b>Amt</b> (amount)	The system enters the total increases according to the current budget, calculated and displayed at the level of proration defined for the budget.

- % (percent)** The system enters the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the current budget.
- Variance** After you create a salary increase plan associated with this budget, the system displays the variance between the salary plan amount and the current budget amount.  
  
If the variance is displayed as a positive amount, the salary plan exceeds the budgeted amount. If the variance is displayed as a negative amount, the planned salaries fall short of the budgeted amount.
- Salary Plan Approved** The approving manager selects **Salary Plan Approved** to approve the plan. **Salary Plan Approved** must be selected to load the salary increases to Job Data.

**Group Increase Budget - Budget Components Page**

Usage	Use the Budget Components page to enter and calculate increases for group members by base pay rate codes. The system calculates the totals for the group and displays them on the Requested Budget page.
Object Name	GROUP_INCR_BUDGET3
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Use, Group Increase Budget, Budget Components</b>
Prerequisites	None
Access Requirements	Select a Group ID, Budget Period Start Date, and Budget ID.

The screenshot shows the 'Budget Components' page with the following details:

- Group ID:** KU005
- Budget Period:** 04/01/2000 - 03/31/2001
- Budget ID:** KU005-B1
- Level of Proration:** Monthly
- Eff Date:** 10/01/2000
- Seq:** 0
- Action:** PAY Pay Rt Chg
- Reason:** MER Merit

The 'Requested Budget' and 'Current Budget' sections each contain a table with the following columns:

Rate Code	Total Increase	Currency	Frequency
NAANNL Default NA	5967.032967	USD	A

Group Increase Budget - Budget Components: Amounts page



Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

### Common Page Information

The following fields are common to multiple pages in this component and are defined at the beginning of this section in Standard Field Definitions for the Group Increase Budget Component: **Group ID, Budget Period, Budget ID, and Level of Proration.**

**Eff Date** (effective date)

Select a budget by effective date.

**Seq**

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

**Action**

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

**Reason**

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



After you enter or adjust the details of the requested budget or current budget by rate code in the grids, click the **Increase Calculation** button to calculate the budget totals. The system updates both the Current budget totals and the Requested budget totals on the Budget Requested page.

For better performance if your group is large, you can use the Budget Calculation application engine process instead of this button.

---

For more information about the Budget Calculation application engine process, see [Calculating the Budget](#).

---

### Requested Budget - Amounts Tab

See the above exhibit for a view of this tab.

**Rate Code**

Select a base pay rate code for which you want to budget an increase. The system calculates the budget for all employees in the group who have this rate code in their compensation package.

**Total Increase**

The system displays the result of the calculation for all employees in the group who have the rate code in their compensation packages. It shows the total increase amount for the rate code, in the currency and frequency of the rate code. For example, if there are 5 employees in the group who have the rate code and you increase the amount by 100 USD, the amount in this field is \$500 USD (5 x 100).

**Currency**

The system displays the currency you defined for the rate code in the Comp Rate Code table.

**Frequency**

The system displays the frequency you defined for the rate code in the Comp Rate Code table.

**Changes Tab**

Group Increase Budget - Budget Components: Changes page

You enter increases differently depending upon the rate code type of the rate code that you enter. The following table shows the fields available for entering increases for each of the rate code types.

<b>Rate Code Type</b>	<b>Available Fields for Entering Increases</b>
Flat Amount, Hourly Rate, Hourly Rate + Flat Amount	<b>Change Amount, Change Percent</b>
Percent	<b>Add Percent</b>
Point	<b>Change Points, Percent of Points</b>

**Change Amount**

If the rate code type is Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount, you can enter a change amount for the rate code. The system calculates the budget by adding this new amount to the compensation for the rate code.

If you enter a **Change Amount**, the **Change Percent** field is cleared.

**Change Percent**

If the rate code type is Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount, you can enter a percent of increase in the amount for the rate code. The system calculates the budget by adding this percent increase to the compensation for the rate code.

If you enter a **Change Percent**, the **Change Amount** field is cleared.

**Change Points**

If the rate code type is Points, you can enter an additional number of points for the rate code. The system calculates the budget by adding this number of points to the points for the rate code and multiplying by the point value that you define in the Company table.

If you enter a **Change Points**, the **Percent of Points** field is cleared.

**Percent of Points**

If the rate code type is Points, you can enter a percent of increase in the number of points for the rate code. The system calculates the budget by adding this percent increase to the points for the rate code and multiplying by the point value that you define in the Company table.

If you enter a **Percent of Points**, the **Change Points** field is cleared.

**Add Percent**

If the rate code type is Percent, you can enter an additional percent for the rate code. The system calculates the budget by adding this percent to the percent for the rate code.

**Current Budget Amounts and Changes**

As you enter the Requested Budget details, the system copies them into the Current Budget grid. The approver can adjust the budget in the Current Budget grid. When you click the **Increase Calculation** button or run the Budget Calculation process, the system calculates and enters the adjusted totals in the Current Budget row on the Requested Budget page.

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

---

**Calculating the Budget**

The system calculates the requested and current budget using online processing when you click the Increase Calculation button on the Budget Components page or the Budget Requested page. For better performance with large groups, calculate the budget using the Budget Calculations application engine process instead of the Increase Calculation button.

### Budget Calculation Page

Usage	Use the Budget Calculation page to run the Budget Calculation application engine process. This process calculates the total budget amount and percent for the rate code increases you enter on the Budget Components page. It enters the totals in the Requested and Current data rows on the Budget Requested page.  You can also calculate the budget using online processing if the group is small. For large groups, use this application engine process.
Object Name	RUNCTL_CALCIBUDGET
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Budget Calculation, Budget Calculation</b>
Prerequisites	Define a group increase budget.
Access Requirements	Enter a run control ID.

Budget Calculation page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

**Group ID** Select the ID of the group whose budget you want to calculate.

**Budget Period Start Date** Select the budget period start date of the budget you want to calculate.

**Budget ID** Select the ID of the budget you want to calculate.

Click **Process Request** to run this request. Process Scheduler runs the Budget Calculation process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.



	To compare the budgets, select the budgets you want to compare and click the Compare button. You can approve a budget by selecting the Budget Approved check box.
Object Name	BUDGET_COMPAR3_INQ
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, Budget Comparison, Budgets</b>
Prerequisites	Set up more than one group increase budget for the group ID and budget period start date.
Access Requirements	Enter a group ID and Budget Period Start Date.

Budgets		Comparison	Components		
Group ID:	KU005	KU005	Compare		
Budget Period Start Date:	04/01/2000				
Budgets					
Budget ID	Short Desc	Effective Date	Seq	Action	Reason
<input checked="" type="checkbox"/>	KU005-B1	KU005-B1	10/01/2000	0 Pay Rt Chg	Merit
<input checked="" type="checkbox"/>	KU005-B1	KU005-B1	04/01/2000	0 Pay Rt Chg	Merit

Budget Comparison - Budgets page



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

The following fields are common to multiple pages in this component and are defined at the beginning of this section in Standard Field Definitions for the Budget Comparison Component: **Group ID** and **Budget Period Start Date**.

### Viewing Budget Information

The system displays the budget description of each budget you created for the specified group ID and budget period start date. The fields on this page are the same as those found on the Group Increase Budget -Budget Requested Page.



For more information about these fields see Group Increase Budget - Budget Requested Page.

### Selecting Budgets to Compare

Check box

Select the check box at the beginning of the grid row for each budget that you want to compare with other budgets on the next page in the component.

**Compare**

Click the **Compare** button to load the selected budgets into the Comparison inquiry page.

**Budget Comparison - Comparison Page**

Usage	Use the Comparison page to view the variance between one budget and all others that you selected on the Budgets inquiry page.  The system displays the budgets that you selected on the Budgets inquiry page. Select the Variance check box next to the budget that you want to compare to the others. The system displays the amount that each budget varies from the selected budget.
Object Name	BUDGET_COMPAR1_INQ
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, Budget Comparison, Comparison</b>
Prerequisites	Select budgets on the Budgets inquiry page.
Access Requirements	Enter a group ID and Budget Period Start Date.

Budgets		Comparison		Components						
Group ID:	KU005	KU005								
Budget Period Start Date:	04/01/2000									
<b>Requested Budgets</b> <span style="float:right">First 1-2 of 2 Last</span>										
Budget ID	Eff Date	Seq	Action Reason	Requested Amount	Requested Pct	Variance	Amount	Variance	Budget Approved	Budget Approval Date
KU005-B1	10/01/2000	0	PAY MER	71521.649	0.70	<input type="checkbox"/>			<input type="checkbox"/>	
KU005-B1	04/01/2000	0	PAY MER	71024.397	0.71	<input type="checkbox"/>			<input checked="" type="checkbox"/>	04/01/2000

Budget Comparison - Comparison page



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

The following fields are common to multiple pages in this component and are defined at the beginning of this section in Standard Field Definitions for the Budget Comparison Component: **Group ID** and **Budget Period Start Date**.

**Requested Budgets**

The system displays the budget description and the **Requested Amount** and **Requested Pct** for each budget that you created for the specified group ID and budget period start date.

**Variance** Select **Variance** for the budget that you want to compare to the other budgets in the page.

**Amount Variance** The system displays the amount that each budget varies from the budget that you selected in the **Variance** field.

**Budget Approved** You can approve a budget on this page by selecting **Budget Approved** in the budget's data row on the grid. You must also enter a **Budget Approval Date**.

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

- Once you approve a budget increase of one budget, the **Budget Approved** check boxes for any other budget are unavailable for entry.
- You can approve a budget increase only if all increases with prior effective date and sequence in the budget are already approved.

---

For more information about budget approval and approval validation, see *Approving a Budget*.

---

When you approve a budget on this page, the system updates the Budget Approved field on the Budget Requested page.

**Budget Approval Date** Enter an approval date for the budget you approved.

**Budget Comparison - Components Page**

Usage	Use the Components page to view budget details by rate code associated with the budget selected in the Variance check box on the Comparison inquiry page.
Object Name	BUDGET_COMPAR2_INQ
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Inquire, Budget Comparison, Components</b>
Prerequisites	Select a budget on the Comparison inquiry page.
Access Requirements	Enter a group ID and Budget Period Start Date.

Budgets		Comparison		Components	
<b>Group ID:</b>	KU005			KU005	
<b>Budget Period Start Date:</b>	04/01/2000				
Requested Components					
Amounts			Changes		
Budget ID	Eff Date	Seq Action Reason	Rate Code	Compensation Rate	Currency Frequency
KU005-B1	10/01/2000	0	NAANNL	5967.032967 USD	A
KU005-B1	04/01/2000	0	NAANNL	6000.000000 USD	A

Budget Comparison - Components: Amounts page

Budgets		Comparison		Components	
<b>Group ID:</b>	KU005			KU005	
<b>Budget Period Start Date:</b>	04/01/2000				
Requested Components					
Amounts			Changes		
Rate Code	Change Amount	Change Percent	Change Points	Percent of Points	Add Percent
NAANNL	2400.000000				
NAANNL	1200.000000				

Budget Comparison - Components: Changes page



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

The following fields are common to multiple pages in this component and are defined at the beginning of this section in Standard Field Definitions for the Budget Comparison Component: **Group ID** and **Budget Period Start Date**.

### Requested Components

For the budget that you selected in the Variance field on the Comparison inquiry page, the system displays the budget description and the requested budget details by rate code. The fields on this page are the same as those found on the Group Increase Budget - Budget Components page.



For more information about these fields, see Group Increase Budget - Budget Components Page.

## Approving a Budget

You can approve a budget by selecting Budget Approved and entering an approval date on either the Group Increase - Budget Requested page or the Budget Comparison – Comparison page. The system automatically updates the Budget Requested page if you approve the budget on the Budget Comparison inquiry page. You can approve only one budget for a single group ID and budget period start date.

Because a single budget ID can have multiple budgeted increases, the system performs the following checks to ensure that only one budget ID is approved for a single group ID and budget period start date:

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

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

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



For more information about budgeting procedures, see Overview of Salary Increase Budgeting Procedures.

---

## Planning Group Salary Increases

Use the Salary Planning by Group pages to create salary increase plans by group. The system loads the group members and their default, budgeted increases into the page, where you can view them one by one. In addition to details of the employee's compensation package by rate code, the pages provide information about the employee's compa-ratio, position in range, last increase date, salary history, and review results. This information helps you make decisions about adjusting the budgeted increase for individual employees without looking elsewhere in the system.

---

### Overview of Salary Increase Planning Procedures

The following procedure outlines how you use the Salary Planning by Groups pages to create salary increase plans.

To create a salary increase plan:

1. Create a group, define salary plan controls, and establish a group increase budget.



For more information about the procedure listed in step 1, see Overview of Salary Increase Budgeting Procedures.

---

2. Run the Salary Plan Calculation process to apply the budgeted increases to the compensation packages of employees in the group.

If the group is small, you can use online processing instead of the batch process. To use online processing, click the Increase Calculation button (the calculator) after entering the Propose Raises page.

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

After making changes, you can click the Refresh Budget (flashlight) button on the Summarize and Approve Raises page to update the current budget on the Requested Budget page.

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

5. Approve employee raises on the Summarize and Approve Raises page.

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

6. Approve the Salary Plan on the Budget Requested page.

---

## Integration of Employee Reviews and Salary Increase Planning

If you use salary increase guidelines matrices in salary planning, when you enter new salary amounts the system calculates whether the figure is under, over, or meets increase guidelines established for the review rating and position in range. To perform these calculations, the system uses the matrix code and rating scale in the employee's Job Data record.

Before entering employee review data in salary increase plans or tracking employee review details, specify default review rating scales for employees in the Job Data, Salary Plan page.

If you use salary increase budgets and plans to administer increases, the system updates the employee record with the rating you enter on the Propose Raises page and displays the review date. You can view this information in both the Job Data, Salary Plan page and the Pay Rate Change - Salary Plan page.

---

## Calculating Salary Increases Based on the Budget

The system can calculate employee increases using either of the following methods:

- The Salary Plan Calculation application engine process.

The Salary Plan Calculation application engine process calculates default employee salary increases by applying the group increase budget increases to the pay components in the employees' compensation packages. The results of the calculations appear on the Salary Planning by Group pages. This process is recommended for calculating large groups.

- Online processing on the Propose Raises page.

Click the Increase Calculation button on the Propose Raises page to use online processing. Online processing is identical to the batch processing, but is more suited to calculating small groups. You click the Increase Calculation button only to load default raises by applying budget increases to the plan members. After you adjust individual increases, use the Refresh Budget button on the Summarize and Approve Raises page if you want to update the budget. If you click the Increase Calculation button after adjusting individual increases, the individual adjustments will be wiped out as the system returns to the default budgeted increases only.

### Salary Plan Calculation Page

Usage	Use the Salary Plan Calculation page to run the Salary Plan Calculation application engine process.
Object Name	RUNCTL_SALPLNGRP
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Salary Plan Calculation, Salary Plan Calculation</b>
Prerequisites	Enter employee raises in the Propose Raises page.
Access Requirements	Enter a run control ID.

The screenshot shows the 'Salary Plan Calculation' page. At the top, it displays 'Run Control ID: 01' and buttons for 'Report Manager', 'Process Monitor', and 'Run'. Below this is a section titled 'Report Request Parameter(s)' with three input fields: 'Group ID' with value 'KU001', 'Budget Period Start Date' with value '04/01/2000', and 'Budget ID' with value 'KU001-B1'. The text 'KU001 - Budget 1' is displayed to the right of the Budget ID field.

Salary Plan Calculation page

- Run Control ID** The system displays the **Run Control ID** you entered when you accessed the page.
- Group ID** Enter the ID of the group for which you want to calculate salary increases.
- Budget Period Start Date** Enter the start date of the budget for which you want to calculate salary increases.
- Budget ID** Enter the ID of the budget for which you want to calculate salary increases.

Click **Process Request** to run this request. Process Scheduler runs the Salary Plan Calculation process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.



For more information about the salary increase planning business process, see Overview of Salary Increase Planning Procedures.

## Proposing and Approving Raises

Use the Salary Planning by Group pages to apply and adjust budgeted salary increases at the individual level and to approve raises. The following table summarizes how you use the pages in this component.

<i>Page Name</i>	<i>Function</i>
Propose Raises	<p>Load group members into the page. During calculation (batch or online) the system calculates default raises by applying the budgeted increases to the corresponding pay components in each employee's compensation package.</p> <p>View the details of each employee's salary increase, including compa-ratio and percent in range.</p> <p>View the details of each employee's compensation package and manually adjust the budgeted increase or add pay components.</p> <p>View the employee's review results. Enter or change the review results.</p> <p>View the employee's salary history.</p>
Summarize and Approve Raises	<p>View the grand totals of the salary increase plan.</p> <p>View the budget description by rate code for each action/action reason.</p> <p>View a summary of each employee's salary increase.</p> <p>Enter a ranking for employees if desired.</p> <p>Approve raises for each employee individually by selecting a status or approve all raises by clicking a button.</p>



For more information about salary increase planning procedures, see Overview of Salary Increase Planning Procedures.

### Propose Raises Page

Usage	Use the Propose Raises page to apply the group increase budget to the pay components of the employees in the group. You can also manually enter pay components and modify salary increases for employees in the group.
Object Name	SALARY_PLAN_GRP
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Use, Salary Planning by Group, Propose Raises</b>
Prerequisites	You must create a group increase budget for the employee's group.
Access Requirements	Enter a group ID, budget period start date, and budget ID. The budget does not have to be approved before you use it for salary increase plans.

Propose Raises
Summarize and Approve Raises

**Group ID:** KU005      KU005      **Budget ID:** KU005-B1      KU005-B1

**Budget Period Start Date:** 04/01/2000    03/31/2001      **Start Dt:** 04/01/2000

1 to 25 of 38

**Total in Group:** 19

**Propose Raises** View All    First  10 of 26  Last

EmplID	Rcd#	*Action	Reason	New Annual Rate	Month Last Incr	
*Eff Date	Seq	*Amount		Job Curr/Freq	Annual %	
Increase %			New Comp Rate		New	New %Rng
					Ratio	
KU0039	0		Quilligan, Shawn		99.0	
10/01/2000	0	PAY	MER	99612.80	USD	3.6
29.626		2,400.00	8,301.07	USD Monthly	1.96	160.4

**Pay Components** Amounts    Changes

Rate Code	Seq	New Comp Rate	New Currency	New Frequency	New Percent
NAANNL	0	51806.40	USD	A	
NAHRLY	0	23.08	USD	H	

Employee Review Rating

Employee Salary History

Propose Raises page



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

### Identifying the Budget

#### Group ID

The system displays the group ID you entered when you accessed the page.

#### Budget ID

The system displays the budget ID you entered when you accessed the page.

<b>Budget Period Start Date</b>	The system displays the budget period start date you entered when you accessed the page.
<b>Start Date</b>	The system displays the salary planning start date that you associated with this budget ID on the Budget Description page.
<b>Request Load</b>	<p>If you have workflow enabled, click <b>Request Load</b> after you have made all manual changes on this page and are ready to approve the salary plan and load the salary increases to the employee Job Data records. When you click this button the system sends a worklist entry to the Personnel Administrator, who can then perform any necessary approvals and run the process to load the salary changes to Job.</p> <p>This button is hidden if you do not enable workflow.</p> <hr/> <p>For more information about approvals, see <a href="#">Approving a Budget</a>.</p> <hr/>
<b>Get Group</b>	<p>Click <b>Get Group</b> to load the group into the page and to make sure the employees displayed in the page are currently eligible group members.</p> <p>The system also updates the Total Annual Salaries on the Summarize and Approve Raises page when you click <b>Get Group</b>, because a change in the group affects the group's totals.</p> <hr/> <p><b>Note.</b> When you refresh the group with the <b>Get Group</b> button the system does not calculate the default proposed budgeted increases for employees added to the group. Click the <b>Increase Calculation</b> button to populate the page with the default budgeted increases for all current group members.</p> <hr/>
<b>Total in Group</b>	<p>The system loads the page in chunks of group members. Use the <b>Previous</b> and <b>Next</b> buttons to select the data of the employee you want to view.</p> <p>The system displays the total number of employees in the group.</p>



Click the **Increase Calculation** button to calculate and load the default budgeted increases for group members. You do not click this button if you use the Salary Plan Calculation process before entering this page.

---

**Note.** Do not click this button after adjusting employee raises on this page unless you want to return to the budgeted increases without any modifications.

---

## Propose Raises

The system enters default proposed increases based on the budget you identified when you entered the page. It applies calculations only to budgeted rate codes that are already in the employee's compensation package. If you want to add additional salary components to the employee's compensation package or to increase components that were not budgeted for, you must add these manually in the Pay Components grid on this page.

<b>EmplID</b> (employee ID)	The system displays the employee's ID number and name.
<b>Empl Rcd#</b> (employment record number)	The system displays the employee's employment record number.
<b>Eff Date</b>	Select a budget increase within the budget by selecting the effective date you defined for the budget increase.
<b>Seq</b>	Select the sequence number of the action that you defined for the budget increase on the Budget Requested page.  This sequence number determines the order in which the salary increases are compounded if there is more than one action/reason in the budget for the same effective date. For example, the first action/reason results in an increase in the amount of compensation for a rate code from \$50,000 to \$53,000. The second action/reason results in adding 3 percent to the same rate code. Because of the sequence, the system calculates and adds 3% of \$53,000.
<b>Action</b>	Select the action that you defined for the budget increase on the Budget Requested page.
<b>Reason</b>	Select the action reason that you defined for the budget increase on the Budget Requested page.
<b>New Annual Rate</b>	The system calculates and displays the employee's new annual rate by applying the budgeted increase for this effective date, sequence, action, and reason to the applicable rate codes in the employee's compensation package.

<b>Increase %</b> (increase percentage)	The system displays the employee's total increase % as of this effective date, sequence, action, and action reason for all components of the budget increase that are in the employee's compensation package.
<b>Amount</b>	The system displays the amount of the employee's total increase for this effective date, sequence, action, and reason for all components of the budget that are in the employee's compensation package.
<b>New Comp Rate</b>	The system displays the employee's new compensation rate as of this effective date, sequence, action, and reason. The New Comp Rate is displayed in the <b>Job Curr/Freq</b> shown on the page.
<b>Job Curr/Freq</b> (job currency and frequency)	The system displays the currency code and frequency specified in the employee's Job record. This is the currency and frequency in which the calculations are displayed.
<b>New Annual Rate</b>	The system displays the employee's new annual compensation rate as of this effective date, sequence, action, and reason.
<b>Month Last Incr</b> (months since last increase)	The system displays the number of months since the employee's last increase.
<b>Annual %</b>	The system displays the employee's annualized change in terms of percent.
<b>New Ratio</b>	The system displays the employee's new compa-ratio. The system calculates the compa-ratio figure from the data in the Salary Grade table.
<b>New % Rng</b> (new percent in range)	The system displays the employee's new percent in range. The system calculates the percent in range figure from the data in the Salary Grade table.

### Pay Components

Most of the fields in this grid default from the information you defined on the Group Increase Budget - Budget Components page. The system populates the grid when you enter the page after running the calculation process or after you enter the page and click the **Increase Calculation** button. To recalculate and refresh the data on the Budget Requested page after you manually add or change data here, click the Refresh Budget button (the flashlight image) on the Budget Description section of the Summarize and Approve Raises page.



Do not click the **Increase Calculation** button after you make manual changes on this page because you will lose your manual changes. Instead, use the **Refresh Budget** button (the flashlight image) on the Budget Description section of the Summarize and Approve Raises page. The **Refresh Budget** button updates the requested budget on the Budget Requested page.

### Amounts Tab

See the above exhibit for a view of this tab.

- Rate Code**                      The system displays the rate codes in the employee’s compensation package. If you are manually entering a new data row you can select a rate code from the valid values.
- Seq**                                The system displays the sequence number of the rate code in the compensation package.
- New Comp Rate**                The system displays the compensation rate for the rate code after applying the new amount, percent, or points.
- New Currency**                 If you want the rate code to have a different currency, you can select that currency here.
- New Frequency**                If you want the rate code to have a different frequency, you can select that frequency here. Valid values are stored on the Frequency table.
- New Points**                     If you proposed an additional point value for the rate code, the system displays the new point value here.
- New Percent**                    If you proposed a different percent value for the rate code, the system displays the new percent value here.
- New Rate Code Group Name**    You can select a different rate code group for the percent increase.

### Changes Tab

Pay Components							
Amounts				Changes			
Rate Code	Seq	Change Amount	Change Percent	Convert	Comprt	Base Pay	Apply FTE
NAANNL	0	2400.00	4.877		4300.533333	<input checked="" type="checkbox"/>	N
NAHRLY	0				4000.533333	<input checked="" type="checkbox"/>	N

Propose Raises - Pay Components: Changes page

<b>Rate Code</b>	The system displays the rate codes in the employee's compensation package. If you are manually entering a new data row you can select a rate code from the valid values.
<b>Seq</b>	The system displays the sequence number of the rate code in the compensation package.
<b>Change Amount</b>	The system displays the proposed change in the amount of compensation for the rate code, in the currency and frequency of the rate code.
<b>Change Points</b>	If the rate code type is Points, the system displays the proposed change in the points for the rate code. You can enter a value for a new data row if the rate code type is Points.
<b>Change Percent</b>	The system displays the proposed percent of change in the compensation for the rate code.
<b>Convert Comprt</b> (converted compensation rate)	The system displays the compensation rate for the rate code converted to the employee's compensation frequency and currency.
<b>Base Pay</b>	The system displays whether this rate code is included in the employee's base pay.
<b>Apply FTE</b>	The system indicates whether Apply FTE is selected for this rate code in the Comp Rate Code Table.

**Employee Review Rating and Salary History**

Click the arrows to expand the Employee Review Rating and Employee Salary History sections.

Propose Raises - Employee Review Rating page

**Employee Review Rating**

In this section you can view or enter the results of the employee's review. The fields in this section are the same as those found on the Employee Review page.



For more information about the Employee Review Rating fields, see Employee Review Page.

### Employee Salary History - Rates tab

Employee Salary History									
Rates					Salary Grade				
Job EffDt	Job EffSeq	Action	Reason	Rating	Comp Rate	Currency	Frequency	Change Percent	Change Amount

Propose Raises - Employee Salary History: Rates page

In this section you can view each salary change in the employee’s salary history over time. The fields in this section detail each salary change and are the same as those found in the employee’s Job record.

- Job EffDt** (job effective date) The effective date of the change in the employee’s compensation.
- Job EffSeq** (job effective sequence) The effective sequence of the change in the employee’s compensation.
- Action** The action that resulted in the change in the employee’s compensation, as recorded in the Job record.
- Reason** The action reason that resulted in the change in the employee’s compensation, as recorded in the Job record.
- Comp Rate** (compensation rate) The employee’s compensation in the Job record for this **Job EffDt** and **Job EffSeq, Action, and Reason.**
- Currency** The currency of the employee’s compensation in the Job record for this **Job EffDt** and **Job EffSeq, Action, and Reason.**
- Frequency** The frequency of the employee’s compensation in the Job record for this **Job EffDt** and **Job EffSeq, Action, and Reason.**
- Change Percent** The percent of change in the employee’s compensation for this **Job EffDt** and **Job EffSeq, Action, and Reason.**
- Change Amount** The amount of change in the employee’s compensation for this **Job EffDt** and **Job EffSeq, Action, and Reason.**

### Employee Salary History – Salary Grade Tab

Employee Salary History						
Rates		Salary Grade				
Job EffDt	Job EffSeq	Salary SetID	Sal Plan	Grade	Comp-Ratio	Month Last Incr

Propose Raises – Employee Salary History: Salary Grade page

<b>Job EffDt</b> (job effective date)	The effective date of the change in the employee's compensation.
<b>Job EffSeq</b> (job effective sequence)	The effective sequence of the change in the employee's compensation.
<b>Salary SetID</b>	The SetID associated with the employee's salary.
<b>Job EffDt</b> (job effective date)	The effective date of the change in the employee's compensation.
<b>Job EffSeq</b> (job effective sequence)	The effective sequence of the change in the employee's compensation.
<b>Sal Plan</b> (salary plan)	The salary plan associated with the employee's job row.
<b>Grade</b>	the salary grade associated with the employee's job row.
<b>Comp-Ratio</b> (compa-ratio)	The employee's compa-ratio for this job row, calculated from data in the Salary Grade table.
<b>Month Last Increase</b>	The number of months since the previous salary increase.

**Summarize and Approve Raises Page**

Usage	The Summarize and Approve Raises page shows the totals by effective date, effective sequence, action, and action reason as well as the overall grand totals of your planned salary increases. It also shows the status of employees' increases, the action reason codes associated with their increases, and their new compensation rates. You can also rank all of the employees in the group.  You can click an Approve All button to mark all salary increases as <i>Approved</i> on this page.
Object Name	SAL_PLAN_GRP_APPR
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Use, Salary Planning by Group, Summarize and Approve Raises</b>
Prerequisites	None
Access Requirements	Enter a group ID, budget ID, and plan period start date.

Propose Raises
Summarize and Approve Raises

**Group ID:** KU001      KU001

**Plan Period:** 04/01/2000 - 03/31/2001      **Start Dt:** 04/01/2000

**Budget ID:** KU001-B1      KU001-B1

**Grand Total**

**Total Annual Salaries:** 2,024,124.04 USD      **Average Percent:** 0.00

**Summarize & Approve Raises** View All    First 2-6 of 25 Last

Rank	Status	EmplID	Rcd#	Eff Date	Seq	Action	Reason	Comp Rate	Job Curr/Freq	Annual Increase
0	Proposed	K0G003	0	04/01/2000	0	PAY	MER	7242.00 USD	M	
0	Proposed	K0G005	0	04/01/2000	0	PAY	MER	4182.00 USD	M	
0	Proposed	K0G007	0	04/01/2000	0	PAY	MER	4182.00 USD	M	
0	Proposed	K0G008	0	04/01/2000	0	PAY	MER	5202.00 USD	M	
0	Proposed	KU0005	0	04/01/2000	0	PAY	MER	5156.67 USD	S	

**Budget Description** View All    First 1 of 1 Last

**Level of Proration:** Monthly      **Current Budget Amount:** 143,811.043 USD      **Avg Pct:** 0.00

**Eff Date:** 04/01/2000      **Seq:** 0      **Action:** PAY Pay Rt Chg      **Reason:** MER Merit

Rate Code	Total Increase	Chng Amt	Change Pct	Add Percent	Chng Pts	Pct of Pts	Currency	Frequency
NAHRLY	24.081000		5.00				USD	H

Summarize and Approve Raises page



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

- Group ID**      The system displays the group ID you entered when you accessed the page.
- Budget ID**      The system displays the budget ID you entered when you accessed the page.
- Plan Period**      The system displays the start and end dates you defined for this budget ID.
- Start Dt (start date)**      The system displays the salary planning start date that you defined for this budget ID.
- Approve All**      Once you have finalized the plan, click the **Approve All** button to mark all increases with the *Approved* status. Increases must have the *Approved* status to be loaded into the employees' job records by the Load All Salary Changes process or Load Salary Changes for Group process.
- Grand Total**

  - Total Annual Salaries**      The system displays the total of all of the salaries in the salary plan.

**Avg % (average percent)**

The system displays the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the plan.



Click the **Refresh** button after you make modifications to the salary increase plan. The system updates the Grand Totals.

**Summarize & Approve Raises**

The system displays the following information for each employee in the group. With the exception of the **Rank** and **Status** fields, this information is identical to the information on the Propose Raises page.

**Rank**

Enter a **Rank** number if you want the employees to appear in an order other than by employee ID. You can use this field for force ranking, such as listing employees from the highest increase to the lowest.

**Status**

The **Status** defaults to *Proposed*. The following are the valid values for this field: *Approved*, *Ineligible*, *No Incr* (No Increase), *Processed*, and *Proposed*. These values are stored in the Translate table.

**EmplID****Rcd#****Eff Date****Seq****Action****Reason****Comp Rate****Job Curr/Freq****Annual Increase**

The system displays the employee's Converted Annual Increase from the Propose Raises page.



For more information and definition of these fields, see Propose Raises Page.

**Budget Description**

In the Budget Description section, the system displays the following information as it appears on the Budget Requested and Budget Components pages.

**Level of Proration****Current Budget Amount**

Avg Pct (average percent)



Click the **Refresh Budget** button to update the Requested Budget row on the Budget Requested page with the manual changes you made on the Propose Raises page.

---

**Note.** If you do not click this button, the manual changes you made on the Propose Raises page will not be reflected in the requested budget totals.

---

**Eff Date**

Seq

Action

Reason

Rate Code

Total Increase

Chng Amt (change amount)

Change Pct ( change percent)

Add Percent

Change Pts (change points)

Pct of Pts (percent of points)

Currency

Frequency



For more information and definition of the Budget Description fields, see Group Increase Budget - Budget Description Page and Group Increase Budget - Budget Components Page.

## Loading Salary Changes to Compensation Records

After you approve your salary increase plans and budgets, you can load the salary increases to the employees' Job records. The system provides the following two database agents for processing salary increases:

- Load All Salary Changes process. Run this process to load all approved salary increases for the budget period start date that you specify, irrespective of the group ID.
- Load Salary Changes for Group process. Run this process to load all approved salary increases for the group ID and budget period start date that you specify.

Both processes insert a new row for the employee in the Job record and the Compensation record. In addition to the new compensation rate, the new record contains the effective date, sequence, action, and action reason that you defined for the increase on the Budget Requested page.

### Prerequisites

Before you can run these processes to load salary changes to the Job Data records, the following approvals must be completed:

- Salary Plan Approved must be selected on the Budget Requested page.
- The individual employee increases must be marked *approved* on the Summarize and Approve Raises page.

---

## Refreshing Anniversary Dates

If you administer the salary plan by anniversary date, run the Create/Refresh Anniversary Dts (dates) process before loading increases to the Job record. Refreshing the anniversary dates ensures the accuracy of the effective date of the increase.

### Create/Refresh Anniversary Dts Page

Usage	This process is only needed if your Salary Increase Plan is based on Employee Anniversary Dates as specified on the Salary Plan Group Default Values page. Running this process will populate a temporary table with required anniversary dates of employees in your group.
Object Name	RUNCTL_GRPANNV
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Create/Refresh Anniversry Dts, Create/Refresh Anniversry Dts</b>
Prerequisites	Define the group.
Access Requirements	Enter a Run Control ID.

Create/Refresh Anniversary Dts

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

---

Report Request Parameter(s)

Group ID:   KU001

Budget Period Start Date:

Budget ID:   KU001 - Budget 1

Create/Refresh Anniversary Dts page

- Run Control ID**                      This system displays the **Run Control ID** that you entered when you accessed the page.
  
- Group ID**                              Enter the ID of the group for which you want to refresh anniversary dates.
  
- Budget Period Start Date**        Enter the start date of the budget for which you want to refresh anniversary dates.
  
- Budget ID**                              Enter the ID of the budget for which you want to refresh anniversary dates.

Click **Process Request** to run this request. Process Scheduler runs the Salary Plan Calculation process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

---

### Load All Salary Changes Page

Usage	Use the Load All Salary Changes page to run the Load All Salary Changes database agent process. The process loads all the new rows into your employees' job and compensation records for the budget date you specify.
Object Name	RUNCTL_CMP006
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Load All Salary Changes, Load All Salary Changes</b>
Prerequisites	The salary increase budget must be approved. Each employee increase that you want to load must have approved status on the Summarize and Approve Raises page.
Access Requirements	Enter a Run Control ID.

Load All Salary Changes

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

---

Report Request Parameter(s)

Budget Period Start Date:

Load All Salary Changes page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **User ID** and **Run Control ID**.

### Entering Process Parameters

**Budget Period Start Date** Enter the budget period start date for which you want to load salary changes. The system will load salary changes for all groups that have approved salary increase budgets and plans defined with this budget period start date.

Click **Process Request** to run this request. Process Scheduler runs the Load All Salary Changes process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

### Load Salary Changes for Group Page

Usage	Use the Salary Changes for Group process page to run the Load Salary Changes for Group database agent process. The process loads all the new rows into your employees' job and compensation records for the group ID and budget date you specify.
Object Name	RUNCTL_CMP006_GRP
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Load Salary Changes For Group, Parameters</b>
Prerequisites	The salary increase budget must be approved. Each employee increase that you want to load must have approved status on the Summarize and Approve Raises page.
Access Requirements	Enter a Run Control ID.

Parameters

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

---

Report Request Parameter(s)

Group ID:   KU001

Budget Period Start Date:

Load Salary Changes for Group page

### Entering Process Parameters

**Run Control ID**                      The system displays the **Run Control ID** you entered when you accessed the page.

**Group ID**                              Enter the group ID for which you want to load salary changes.

**Budget Period Start Date**        Enter the budget period start date for which you want to load the group's salary changes.

Click **Process Request** to run this request. Process Scheduler runs the Load Salary Changes for Group process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.



# Processing Mass Salary Increases

In the Plan Salaries Process menu you'll find three processes to implement salary mass updates. This section describes the following three processes and how to run them:

- Updating Salaries by Percent, Amount, or Points.
- Updating Salaries by Salary Plan / Pay Group.
- Updating Salaries by Job Code.

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

## Updating Salaries by Percent, Amount, or Points

Use the Update by Pct (percent), Amount, Points process to perform salary updates by rate code. Depending upon the rate code type, you specify the salary change as a change in amount, percent, or points. The process calculates the new employee compensation rates and inserts job data rows using the effective date and action/reason you specify.

---

### Running the Process Using the Application Engine, SQR, and Database Agent

You follow a three-step procedure to run the Update by Pct, Amount, Points process. All three steps are available in the Process Scheduler when you use the Update by Pct, Amount, Points Process run control page.

To run the Update by Pct, Amount, Points process:

1. Run the Application Engine process (CMP009) first to apply the percent, amount, or point changes to the rate code.
2. Run the SQR report (CMP009) to review all the data created by running the Application Engine process.
3. Run the Database Agent to load all the data to the Job Data record for your employees.

## Update by Pct, Amount, Points Process Page

Usage	Use the Update by Pct, Amount, Points page to run the Application Engine, SQR, and Database Agent processes to generate salary mass salary updates by pay component.
Object Name	RUNCTL_CMP009
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Update by Pct, Amount, Points, Update by Pct, Amount, Points</b>
Prerequisites	None
Access Requirements	Enter a run control ID.

Update by Pct, Amount, Points

Run Control ID: 01      Report Manager    Process Monitor    Run

Report Request Parameter(s)

New Job Effective Date: 04/01/2000

Action: Pay Rate Change

Reason Code: MER Merit       Show Components?

Rate Code	Change Amount	Change Percent	Add Percent	Change Points	Percent of Points	Currency	Frequency
NAANNL	5.00	5.00		5.00	5.00	USA	A

Update by Pct, Amount, Points Process page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

### Report Request Parameters

- New Job Effective Date**      Enter the date that you want the new job row to take effect.
- Action**      Select an action code for the mass update.
- Reason Code**      Select an action reason code for the mass update.
- Show Components**      Select **Show Components** if you want the pay components to appear on the report.

### Changed Components

You enter increases in this grid differently depending upon the rate code type of the **Rate Code** that you enter. The following table shows the fields available for entering increases for each of the rate code types.

<b>Rate Code Type</b>	<b>Available Fields for Entering Increases</b>
Flat Amount, Hourly Rate, Hourly Rate + Flat Amount	<b>Change Amount, Change Percent</b>
Percent	<b>Add Percent</b>
Point	<b>Change Points, Percent of Points</b>

#### Rate Code

Select a base pay rate code for which you want to process an increase. The system calculates the increase for all employees who have this rate code in their compensation package.

#### Change Amount

If the rate code type is *Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount*, you can enter a change amount for the rate code. The system calculates the increase by adding this new amount to the compensation for the rate code.

If you enter a **Change Amount**, the **Change Percent** field is cleared.

#### Change Percent

If the rate code type is *Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount*, you can enter a percent of increase in the amount for the rate code. The system calculates the increase by adding this percent increase to the compensation for the rate code.

If you enter a **Change Percent**, the **Change Amount** field is cleared.

#### Add Percent

If the rate code type is *Percent*, you can enter an additional percent for the rate code. The system calculates the increase by adding this percent to the percent compensation for the rate code.

#### Change Points

If the rate code type is *Points*, you can enter an additional number of points for the rate code. The system calculates the increase by adding this number of points to the points for the rate code and multiplying by the point value that you define in the Company table.

If you enter a **Change Points**, the **Percent of Points** field is cleared.

**Percent of Points**

If the rate code type is *Points*, you can enter a percent of increase in the number of points for the rate code. The system calculates the increase by adding this percent increase to the points for the rate code and multiplying by the point value that you define in the Company table.

If you enter a **Percent of Points**, the **Change Points** field is cleared.

**Currency**

Select the currency in which you want the rate code to be calculated.

**Frequency**

Select the frequency with which you want the rate code to be calculated.

Click **Run** to run this request. Process Scheduler runs the Update by Pct, Amount, Points process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

---

## Updating Salaries by Salary Plan / Pay Group Process

This process enables you to perform salary grade or step updates for all employees in a salary grade. This is particularly useful if the compensation has changed retroactively. You can use pay group parameters or salary plan parameters to run the update.

The system performs the following processes for all employees in the specified pay group or salary grade during the time period specified:

- For grade changes: Checks the Salary Grade table for any changes in minimum, midpoint, and maximum pay rate during the specified dates for the employee's job. If it finds a pay rate change, it enters a new job row with the effective date of the grade change, action of PAY (pay rate change), and action reason of ADJ (adjustment).
- For step changes: Compares the compensation package of the employee with the package of the step. If it finds a change in the step, it enters a new job row with the effective date of the step change, the new package, the action of PAY (pay rate change), the action reason of ADJ (adjustment), and marks it manual.

---

### Running the Process Using the Application Engine, SQR, and Database Agent

You follow a three-step procedure to run the Update by Sal (salary) Plan / Paygroup process. All three steps are available in the Process Scheduler when you use the Update by Sal Plan / Paygroup Process run control page.

To run the Update by Sal Plan / Paygroup process

1. Run the Application Engine process (CMP008) first to apply the update to the salary plan or pay group.
2. Run the SQR report (CMP008) to review all the data created by running the Application Engine process.
3. Run the Database Agent to load all the data to the Job Data pages for your employees.

---

### Update by Sal Plan / Pay Group Process Page

Usage	Use the Update by Sal (salary) Plan / Paygroup page to update the job compensation rate when the salary grade or step changes retroactively.
Object Name	RUNCTL_CMP008
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Update by Sal Plan / Paygroup, Update by Sal Plan / Paygroup</b>
Prerequisites	None
Access Requirements	Enter a Run Control ID.

Update by Sal Plan / Paygroup

Run Control ID: 01 Report Manager Process Monitor

---

**Report Request Parameter(s)**

Start Date:    Show Components?

End Date:

---

**Paygroup Parameters**

Company:

Pay Group:

---

**Sal Plan / Grade Parameters**

Business Unit:   Setid for CAN01 BU

Salary Administration Plan:   CDN Salary Administration Plan

Salary Grade:   Standard Pay Grade 1

Update by Sal Plan / Paygroup Process page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

#### Report Request Parameters

**Start Date** Enter the beginning date of the period for which you want to update salaries.

**End Date** Enter the ending date of the period for which you want to update salaries.

**Show Components** Select **Show Components** if you want the pay components to appear on the report.

**Paygroup Parameters**

If you are updating salaries by pay group, specify the pay group in these fields.

**Company** Select the company for which you want to update salaries.

**Pay Group** Select the pay group for which you want to update salaries.

**Sal Plan / Grade Parameters**

If you are updating salaries by salary plan and grade, specify the plan and grade in these fields.

**Business Unit** Select the business unit for which you want to update salaries.

**Salary Administration Plan** Select the salary plan for which you want to update salaries.

**Salary Grade** Select the salary grade for which you want to update salaries.

Click **Run** to run this request. Process Scheduler runs the Update by Sal Plan / Paygroup process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

**Updating Salaries by Job Code Process**

You can use the Update by Job Code process to update salary data for all employees in a job code when you change the job code salary administration plan, grade, or step in the Job Code table. The process inserts a new job row with the action and action reason codes you specify on the run control page. The effective date of the change is the From Date that you specify as the run control parameter.

**Update by Job Code Process Page**

Usage	Use the Update by Job Code page to reclassify a job code.
Object Name	RUNCTL_CMP010

Navigation	<b>Administer Workforce, Plan Salaries (GBL), Process, Update by Job Code, Update by Job Code</b>
Prerequisites	None
Access Requirements	Enter a Run Control ID.

Update by Job Code

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

---

**Report Request Parameter(s)**

**Business Unit:**  Global Business Institute BU

**Job Code:**  Computer Programmer

**Start Date:**

**End Date:**

**Action:**

**Reason Code:**  Adjustment

Update by Job Code Process page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

### Report Request Parameters

- Business Unit**                      Select the business unit for which you want to update salaries.
  
- Job Code**                              Select the job code you are updating.
  
- Start Date**                            Enter the beginning date of the period for which you want to update salaries. The system uses the **From Date** as the effective date of the salary change.
  
- End Date**                                Enter the ending date of the period for which you want to update salaries.
  
- Action**                                  Select the action code that you want the system to enter on the new job row for the salary update.
  
- Reason Code**                          Select the action reason code that you want the system to enter on the new job row for the salary update.

Click **Run** to run this request. Process Scheduler runs the Update by Job Code process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

---

## Using Mass Change Templates to Update Salary Data

In addition to the mass salary increase processes in the Plan Salaries menu, we deliver templates for implementing mass salary changes using PeopleTools mass change functionality.



For more information about using mass change templates to update salary data, see Using Mass Change. For more information about the mass change templates provided for updating salary data, see Salary Change Templates.

---

## CHAPTER 7

# Viewing Summary Salary Data

The Plan Salaries Inquire menu contains three pages that provide online summary salary data. These pages can be helpful when you make salary increase decisions, no matter which method of salary planning you choose.

### Standard Field Definitions for Salary Data Inquiry Pages

The following fields are common to many of these inquiry pages:

#### Compa-Ratio

A calculation that shows where employees' salaries lie in relation to the midpoint range for their salary grades.

---

For more information about Compa-Ratio, see "Administering Salary Plans, Grades, and Steps".

---

#### Percent in Range

A calculation that shows where employees' salaries fall within the range set up for their salary grades.

---

For more information about Percent in Range, see "Administering Salary Plans, Grades, and Steps".

---

## Viewing Compensation History

The Compensation History page shows the starting salary and all subsequent increases an employee has received. It does not display every administrative action; for example, it does not show job movements. It does show the Hire and Rehire actions and any administrative action that results in a change in salary data.

In addition to standard compensation information, you can see the number of months since the employee's last increase. You can see also how long the employee has been in a salary grade, as of today. The details by pay component appear in a grid at the bottom of the page.

---

### Compensation History Page

Usage	Use the Compensation History page to view the history of all pay rate changes the employee has received to date. This is particularly useful as
-------	---

	a reference when planning new increases.
Object Name	COMP_SUMMARY
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (USF), Inquire, Comp Summary, Compensation Summary</b></li> <li>• <b>Develop Workforce, Plan Careers, Inquire, Compensation Summary, Compensation Summary</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Inquire, Compensation History, Compensation History</b></li> <li>• <b>Develop Workforce, Plan Successions (GBL), Inquire, Compensation Summary, Compensation Summary</b></li> <li>• <b>Develop Workforce, Plan Successions (USF), Inquire, Compensation Summary, Compensation Summary</b></li> </ul>
Prerequisites	None
Access Requirements	Enter an employee ID.

Compensation History

O'Flaherty, Seamus Patrick ID: KG0005 Empl Rcd#:

**Company:** BIUK **Job Title:** SREP **Hire Date:** 10/01/1999

**Description:** Sales and Marketing - UK **Location:** Belfast **County:** BFS **Country:** GBR

**Department:** SMNIR

**Compensation** View All First 1 of 1 Last

Eff Date	Seq	Action Reason	Comp Rate Annual Rate	Frequency	Rating Increase Amount/Pct	Setid	Plan	Grade	Step/Compa Rto	Entry Dt	PIR/#Yrs
10/01/1999	0	Hire	2,658.33	GBP Monthly		GBR01	KG01	06		10/01/1999	
			31,899.91								1.25 118.2 0.9

**Pay Components**

Amounts Changes

Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
KG0001	0	<a href="#">Details</a>	2166.66	GBP	Monthly			
KGC001	0	<a href="#">Details</a>	725.00	GBP	Quarterly		10.000	
KGT001	0	<a href="#">Details</a>	3000.00	GBP	Annual			

Compensation History: Amounts page



Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#** (employee record number), **Company, Job Title, Hire Date, Description, Location, Country, Department, and SetID.**

The following fields are common to multiple pages in this component and are defined at the front of this section in Standard Field Definitions for Salary Data Inquiry Pages: **Compa-Ratio** and **Percent in Range**.

### Common Page Information

For each salary change the system displays the following data from the employee's job and compensation records:

<b>Eff Date</b> (effective date)	The effective date of the employee's salary change.
<b># Mos</b> (number of months)	The number of months since the last increase.
<b>Seq</b> (sequence)	The sequence number of the salary change action.
<b>Action</b>	The action that resulted in a salary change.
<b>Reason</b>	The action reason that you defined for the action.
<b>Comp Rate</b> (compensation rate)	The employee's compensation rate as of this effective date, sequence, action, and reason.
<b>Annual Rate</b>	The employee's new annual rate as of this effective date, sequence, action, and reason.
<b>Frequency</b>	The frequency of the employee's compensation rate.
<b>Rating</b>	The employee's review rating.
<b>Increase Amount</b>	The amount of the employee's increase for this effective date, sequence, action, and reason.
<b>Increase Percent</b>	The percentage increase for this effective date, sequence, action, and reason.
<b>Plan</b>	The employee's salary administration plan for this effective date, sequence, action, and reason.
<b>Grade</b>	The employee's salary grade for this effective date, sequence, action, and reason.
<b>Step</b>	The employee's salary step for this effective date, sequence, action, and reason.
<b>Entry Date</b>	The date the employee entered the step.
<b>Compa Rto</b> (ratio)	The employee's new compa-ratio for this effective date, sequence, action, and reason. The system calculates the compa-ratio figure from the data in the Salary Grade table.
<b>PIR</b> (percent in range)	The employee's new percent in range for this effective date, sequence, action, and reason. The system calculates the percent in range figure from the data in the Salary Grade table.

**#Yrs** (number of years)            The number of years the employee has been in this grade.

**Amounts Tab**

See the above exhibit for a view of this tab.

For each salary change this page displays pay component details from the employee’s job and compensation records. In the Amounts tab, the system displays the description of the pay component before the salary change.

- Rate Code**                            The rate code of the salary change.
- Seq** (sequence)                    The system displays the rate code sequence number.
- Details**                                Click **Details** to access the Comp Rate Code page for more information about the rate code.
- Comp Rate** (compensation rate)    The compensation rate associated with the rate code.
- Currency**                            The currency associated with the rate code.
- Frequency**                          The frequency associated with the rate code
- Points**                                If the rate code type is **Points**, the system displays the number of points defined for this rate code.
- Percent**                              If the rate code type is **Percent**, the system displays the percent defined for this rate code.
- Rate Code Group**                    If the rate code type is **Percent**, the system displays the rate code group to which the percent applies.

**Changes Tab**

Pay Components						
Amounts		Changes				
Rate Code	Seq	Change Amount	Change Points	Change Percent	Apply FTE	Converted Comp Rate
KG0001	0				<input checked="" type="checkbox"/>	2166.660000
KGC001	0				<input type="checkbox"/>	241.666000
KGT001	0				<input type="checkbox"/>	250.000000

Compensation History: Changes page

In the Changes tab, the system displays the details of the salary change.

**Change Amount**                    If the rate code type is **Flat Amount**, **Hourly Rate**, or **Hourly Rate + Flat Amount**, the system displays the change amount associated with the rate code.

**Change Points**                      If the rate code type is **Points**, the system displays the change points associated with the rate code.

- Change Percent** If the rate code type is *Percent*, the system displays the change percent associated with the rate code.
- Apply FTE** This box is selected if you elected to apply FTE calculations to frequency calculations of this rate code.
- Converted Comp Rate** The system displays the new compensation rate for the rate code converted to the employee's compensation frequency and currency.

**Comp Rate Code Page**

Usage	Use the Comp Rate Code page to view additional information about the compensation rate code from the Comp Rate Code table.
Object Name	COMP_RATECD5_SEC
Navigation	Click the Details link on the Compensation History: Amounts page.

**Comp Rate Code**

<b>Comp Rate Code:</b>	K0GRCH
<b>Description</b>	Global Base RC Hourly
	<input checked="" type="checkbox"/> <b>Base Pay</b> <input type="checkbox"/> <b>Use Highest Rate</b>
<b>Rate Code Type:</b>	Hourly Rate
<b>Rate Code Class:</b>	

Compensation History - Comp Rate Code page

- Comp Rate Code** The system displays the rate code selected on the Compensation History page.
- Description** The system displays the description of the rate code as entered in the Comp Rate Code table.
- Base Pay** **Base Pay** is selected here if it is selected for the rate code in the Comp Rate Code table.
- Use highest Rate** **Use Highest Rate** is selected here if it is selected for the rate code in the Comp Rate Code table.
- Rate Code Type** The system displays the rate code type associated with the rate code in the Comp Rate Code table.
- Rate Code Class** The system displays any Rate Code Class associated with the percent-type rate code in the Comp Rate Code table.



For more information about the fields on this page, see Comp Rate Code Table - Comp Rate Code Table Page.

## Viewing Employee Ranking

The system provides two inquiry pages for viewing how employees rank in terms of compensation within a job code. Both pages group employees by salary plan and show the current ranges for the salary plan and grade. You can use this information to compare compensation to the minimum, maximum, and midpoints for the grade, and to determine whether employees in a job code are being paid equitably in each location.

- The Employee Ranking by Job Code page lists employees by name and employee ID, and displays their location, annual rate, compa-ratio, and percent in range. Use a link to the Salary Components page to view the details of the selected employee's compensation package.
- The Ranking by Job Code - No Name page lists employee compensation without displaying names and employee ID numbers, to preserve privacy. The page sorts employee compensation by currency in descending order of salary amounts, and displays the location, annual rate, compa-ratio, and percent in range.

### Employee Ranking by Job Code Inquiry Page

Usage	Use the Employee Ranking by Job Code page to view how employees rank in terms of compensation within a job code.
Object Name	JOB_RANKING
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Manage Performance (USF), Inquire, Employee Ranking by Job Code, Employee Ranking by Job Code</b></li> <li>• <b>Develop Workforce, Manage Positions (USF), Inquire, Employee Ranking by Job Code, Employee Ranking by Job Code</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Inquire, Employee Ranking by Job Code, Employee Ranking by Job Code</b></li> </ul>
Prerequisites	None
Access Requirements	Enter a Job Code.

Employee Ranking by Job Code									
<b>SetID:</b>	SHARE		<b>Job Code:</b>	Accounting Clerk			<b>Job Family:</b>		
<b>Manager Level:</b>	Non-Mgr		<b>Job Function:</b>	Finance and Accounting					
<b>Salary SetID:</b>	SHARE		<b>Plan/Grade/Step:</b>	KC02					
Current Annual Ranges									
<b>SetID</b>	<b>Sal Plan</b>	<b>Grade</b>	<b>Step</b>	<b>Min/Annual</b>	<b>Midpt/Annual</b>	<b>Max/Annual</b>	<b>Currency</b>	<b>Co</b>	
SHARE	KC01 Cdn Plan	004	5	23,504.04	28,299.72	33,095.40	CAD	GBI	
Compensation Ranking									
<b>EmplID</b>	<b>Name</b>	<b>Annual Rate</b>	<b>Company</b>	<b>SetID</b>	<b>Location</b>	<b>Comp-Ratio</b>	<b>%Rng</b>		
KC0003	Rogers,Cynthia A	23,010.00	CAD GBI	CANSK	KCSK00	0.81	-2.1		
KC0003	Rogers,Cynthia A	23,010.00	CAD GBI	SHARE	KCSK00	0.81	-2.1		

Employee Ranking by Job Code page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EmplID**, **Name**, **Company**, **SetID**, and **Location**.

**Job Code Description**

The system displays the following information about the job code that you selected when you accessed the page:

**SetID**

**Job Code**

**Manager Level**

**Job Function**

**Job Family**

**Salary SetID**

**Plan/Grade/Step**



For more information about these fields, see Job Code Table - Job Code Profile Page.

**Current Annual Ranges**

The system displays the following description of the salary plan and grade of the job code:

**SetID**

**Sal Plan** (salary plan)

**Grade**

**Step**

**Min/Annual** (minimum annual)

The minimum salary in the grade expressed in annual frequency.

**Midpt/Annual** (midpoint annual)

The midpoint salary in the grade expressed in annual frequency.

**Max/Annual** (maximum annual)

The maximum salary in the grade expressed in annual frequency.

**Currency**

**Company**



For more information about these fields, see Salary Grade Table Page.

**Compensation Ranking**

The system displays the following information for each employee. Employees are listed in order from the highest compensation to the lowest.

**EmplID** (employee ID)

**Name**

**Annual Rate**

**Company**

**Currency**

**SetID**

**Location**

**Comp-Ratio** (compa-ratio)

**%Rng** (percent in range)



Click the **Component Details** button to access the Salary Components page, where you can view the employee's compensation details by pay component.

### Employee Ranking by Job Code - Salary Components Page

Usage	Use the Salary Components page to view the details of the employee’s compensation package associated with the current Job data row.
Object Name	COMP_EMPL_RANK_SEC
Navigation	Click the button on the Employee Ranking by Job Code page.

**Salary Components**  
 Rogers,Cynthia A ID: KC0003    Empl Rcd#: 0

**Compensation Rate:** 885.00 CAD **Comp Freq:** B Biweekly

**Pay Components**

Amounts    Changes

Rate Code Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
NAHRLY	<a href="#">Details</a>	14.75 CAD	CAD	H			

Employee Ranking by Job Code - Salary Components: Amounts page



Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID**, **Empl Rcd#**, and **Currency**.

#### Common Page Information

The system displays the following information for the selected employee:

**Compensation Rate**                      The employee’s annual compensation rate.

**Comp Freq** (compensation frequency)                      The employee’s compensation frequency.

#### Pay Components

This section displays the details of the compensation package associated with the employee’s most current job data row displayed on the Employee Ranking by Job Code page.

#### Amounts Tab

See the above exhibit for a view of this tab.

For each salary change this page displays pay component details from the employee’s job and compensation records. In the Amounts tab, the system displays the description of the pay component before the salary change.

**Rate Code**                                      The rate code of the salary change.

- Seq** (sequence)                      The system displays the rate code sequence number.
- Details**                                Click **Details** to access the Comp Rate Code page where more information about the rate code is displayed.
- Details**                                Click the **Details** button to see the details of the **Rate Code** definition.
- Comp Rate** (compensation rate)    The compensation rate associated with the rate code.
- Currency**                              The currency associated with the rate code.
- Frequency**                            The frequency associated with the rate code.
- Points**                                If the rate code type is **Points**, the system displays the number of points defined for this rate code.
- Percent**                                If the rate code type is **Percent**, the system displays the percent defined for this rate code.
- Rate Code Group**                    If the rate code type is **Percent**, the system displays the rate code group to which the percent applies.

**Employee Ranking by Job Code - Salary Components: Changes Tab**

Salary Components					
Rogers, Cynthia A		ID:	KC0003	Empl Rcd#:	0
<b>Compensation Rate:</b>	885.00	CAD	<b>Comp Freq:</b>	B	Biweekly
Pay Components					
Amounts		Changes			
Rate Code	Seq	Change Amount	Change Points	Change Percent	Apply FTE
NAHRLY	0	1.000000		7.273	<input checked="" type="checkbox"/>
					Converted Comp Rate
					885.000000

Employee Ranking by Job Code – Salary Components: Changes page

In the Changes tab, the system displays the details of the salary change.

- Change Amount**                      If the rate code type is **flat amount or hourly rate**, the system displays the change amount associated with the rate code.
- Change Points**                        If the rate code type is **Points**, the system displays the change points associated with the rate code.
- Change Percent**                        If the rate code type is **Percent**, the system displays the change percent associated with the rate code.
- Apply FTE**                                This box is selected if you elected to apply FTE calculations to frequency calculations of this rate code.

**Converted Comp Rate** The system displays the new compensation rate for the rate code converted to the employee's compensation frequency and currency.

**Ranking by Job Code - No Name Page**

Usage	Use the Ranking by Job Code - No Name page to view how employees rank in terms of compensation within a job code. To protect privacy, employee identification does not appear in the page.
Object Name	JOB_RANKING_NO_EE
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Manage Performance (USF), Inquire, Ranking by Job Code - No Name, Ranking by Job Code - No Name</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Inquire, Ranking by Job Code - No Name, Ranking by Job Code - No Name</b></li> </ul>
Prerequisites	None
Access Requirements	Enter a job code.

Ranking by Job Code - No Name								
<b>SetID:</b>	SHARE	<b>Job Code:</b>	KC001	Accounting Clerk				
<b>Manager Level:</b>	Non-Mgr	<b>Job Function:</b>	Finance and Accounting					
<b>Salary Administration Plan:</b>	KC02	<b>Grade:</b>	<b>Step:</b>	<b>Job Family:</b>				
<b>Current Annual Ranges</b> <span style="float:right">View All First 1 of 4 Last</span>								
<b>SetID</b>	<b>Plan</b>	<b>Grade</b>	<b>Min/Annual</b>	<b>Midpt/Annual</b>	<b>Max/Annual</b>	<b>Company</b>		
SHARE	KC01 Cdn Plan	004	23,504.04	28,299.72	33,095.40	CAD GBI		
<b>Compensation Ranking</b> <span style="float:right">First 1-2 of 2 Last</span>								
<b>Annual Rate</b>	<b>Currency</b>	<b>Rating</b>	<b>Company</b>	<b>Location</b>	<b>Grade Date</b>	<b>Yrs Grade</b>	<b>Comp-Ratio</b>	<b>% Range</b>
23,010.00	CAD		GBI	Regina	03/12/1988	12.5	0.81	-2.1
23,010.00	CAD		GBI	Regina	03/12/1988	12.5	0.81	-2.1

Ranking by Job Code - No Name page

All of the fields on this page are the same as fields on the Employee Ranking by Job Code page, with the addition of the following fields:

- Rating** The employee's review rating.
- Grade Date** The date the employee entered the salary grade.
- Yrs Grade (years in grade)** The number of years the employee has been in the grade.



For more information about the remaining fields on this page, see Employee Ranking by Job Code Inquiry Page.

## Viewing Job Evaluations

A job evaluation is a method of ranking job codes relative to one another. You create job evaluation criteria in the Job Code table, assigning points for Knowhow, Accountability, and Problem-solving skills. In the Job Evaluations by Grade inquiry page, you can view the evaluation information alongside the managerial level and function of each job code. Job codes are sorted in descending order by total points.

You can also generate the Job Grading by Evaluation Points report (CMP002), which provides similar information.

---

### Job Evaluations by Grade Page

Usage	Use the Job Evaluations by Grade page to compare job evaluation criteria among job codes within a salary plan and grade.
Object Name	JOB_EVALUATIONS
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Manage Performance (USF), Inquire, Position Evaluations by Grade, Job Evaluations by Grade</b></li> <li>• <b>Develop Workforce, Manage Positions (USF), Inquire, Job Evaluations by Grade, Job Evaluations by Grade</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Inquire, Job Evaluations by Grade, Job Evaluations by Grade</b></li> </ul>
Prerequisites	None.
Access Requirements	Enter a SetID, Salary Administration Plan, and Salary Grade.

Job Evaluations by Grade

**SetID:** SHARE

**Salary Administration Plan:** KC01 CDN Salary Administration Plan

**Salary Grade:** 001 Standard Pay Grade 1

**Current Annual Ranges**

<b>Minimum:</b>	11,142.44	<b>Midpoint:</b>	15,596.80	<b>Maximum:</b>	20,051.16	CAD
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**Job Evaluation**

SetID	Job Code	Short Desc	Total Points	Job Function	Manager Level	Knowhow	Accountability	Problem-Solving

Job Evaluations by Grade page

### Identifying a Salary Grade

The system displays the **SetID**, **Salary Administration Plan**, and **Salary Grade** that you entered when you accessed the page.

### Current Annual Ranges

The system displays the following information about the salary grade, as you defined it on the Salary Grade Table page:

<b>Minimum</b>	Minimum annual compensation in the grade.
<b>Midpoint</b>	Midpoint annual compensation in the grade.
<b>Maximum</b>	Maximum annual compensation in the grade.

### Job Evaluation

<b>SetID</b>	The SetID associated with the job code.
<b>Job Code</b>	The job codes in the grade
<b>Short Descr (description)</b>	The short description of the job code.
<b>Total Points</b>	The total evaluation points associated with this job code.
<b>Job Function</b>	The job function associated with this job code.
<b>Manager Level</b>	The managerial level associated with this job code.
<b>Knowhow</b>	The system displays the number of points associated with this criterion for this job code.
<b>Accountability</b>	The system displays the number of points associated with this criterion for this job code.
<b>Problem-Solving</b>	The system displays the number of points associated with this criterion for this job code.



For more information about the fields on this page, see Salary Grade Table Page.

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## CHAPTER 8

# Reporting Salary Data

PeopleSoft Human Resources salary planning reports provide the following types of summary information:

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

This section provides a description of each report and information on how to run it.



For more information about generating reports, see Introduction to PeopleSoft Reporting. **For a complete listing** of all PeopleSoft Human Resources reports by Report Name, see List of Reports in PeopleSoft Human Resources.

## List of Planning Salaries Reports

<i>Report Name</i>	<i>Report ID</i>	<i>Location</i>	<i>Global or Local</i>
Above Maximum Analysis Report	CMP005	Administer Workforce, Plan Salaries (GBL), Report, Above Maximum Analysis	GBL
Automated Step Increase Report	CMP007	Administer Workforce, Plan Salaries (GBL), Process, Automated Step Increase	GBL
Below Minimum Analysis Report	CMP004	Administer Workforce, Plan Salaries (GBL), Report, Below Minimum Analysis	GBL
Compa-Ratio Analysis Report	CMP003	Administer Workforce, Plan Salaries (GBL), Report, Compa_Ratio Analysis	GBL
Departmental Salaries Report	PER012	Administer Workforce, Plan Salaries (GBL), Report, Departmental Salaries	GBL

<b>Report Name</b>	<b>Report ID</b>	<b>Location</b>	<b>Global or Local</b>
EE Review Result Distribution Report	PER026	Administer Workforce, Plan Salaries (GBL), Report, EE Review Result Distribution	GBL
Employee Compensation Changes Report	PER013	Administer Workforce, Plan Salaries (GBL), Report, Employee Compensation Changes	GBL
Employee Review Audit Report	PER008	Administer Workforce, Plan Salaries (GBL), Report, Employee Review Audit	GBL
Employee With Merit Report	PER041	Administer Workforce, Plan Salaries (GBL), Report, Employee with Merit	GBL
Employee Without Merit Report	Per042	Administer Workforce, Plan Salaries (GBL), Report, Employee without Merit	GBL
Job Grading by Evaluation Points Report	CMP002	Administer Workforce, Plan Salaries (GBL), Report, Job Grading by Evaluation Pts	GBL
Salary Change Mass Update by Percent, Amount, Points Report	CMP009	Administer Workforce, Plan Salaries (GBL), Process, Update by Pct, Amount, Points	GBL
Salary Change Mass Update by Salary Plan / Pay Group Report	CMP008	Administer Workforce, Plan Salaries (GBL), Process, Update by Sal Plan / Paygroup	GBL
Salary Grade Table Report	PER706A	Administer Workforce, Plan Salaries (GBL), Report, Salary Grade Table	GBL
Salary Grade/Step Tables Report	PER706B	Administer Workforce, Plan Salaries (GBL), Report, Salary Grade/Step Tables	GBL
Salary History by Employee Report	CMP011	Administer Workforce, Plan Salaries (GBL), Report, Salary History by Employee	GBL
Salary History by Group Report	CMP014	Administer Workforce, Plan Salaries (GBL), Report, Salary History by Group	GBL
Salary History for Company Report	PER023	Administer Workforce, Plan Salaries (GBL), Report, Salary History for Company	GBL

<b>Report Name</b>	<b>Report ID</b>	<b>Location</b>	<b>Global or Local</b>
Salary Mass Update by Job Code Report	CMP010	Administer Workforce, Plan Salaries (GBL), Process, Update by Job Code	GBL
Salary Structure Report	CMP001	Administer Workforce, Plan Salaries (GBL), Report, Salary Structure	GBL

## Generating the Salary Structure Report

The Salary Structure report lists all salary grades in descending order by grade. For each grade, it lists the annual minimum, midpoint, and maximum amount being paid.

---

### Salary Structure Report Page

Usage	Use this run control page to run the Salary Structure report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Salary Structure</b>
Access Requirements	Enter a Run Control ID.

Salary Structure Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**, **Language**, **As Of Date**.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

---

---

## Salary Structure Report

Description	The Salary Structure report lists all salary grades in descending order by grade. For each grade, it lists the annual minimum, midpoint, and maximum amount being paid.
Report ID	CMP001
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATA
Source Records	SAL_GRADE_TBL, SAL_PLAN_TBL
Sorted By	Salary Administration Plan, Salary Grade

The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

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## Generating the Job Grading by Evaluation Points Report

The Job Grading by Evaluation Points report lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment.

---

### Job Grading by Evaluation Points Report Page

Usage	Use this run control page to run the Job Grading by Evaluation Pts (points) report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Job Grading by Evaluation Pts</b>
Access Requirements	Enter a Run Control ID.

Job Grading by Evaluation Points Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**, **Language**, **As of Date**.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

### Job Grading by Evaluation Points Report

Description	The Job Grading by Evaluation Points report lists each salary grade in the organization. It includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report also includes salary survey information and associated point ratios and midpoints.
Report ID	CMP002
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATA
Source Records	JOBCODE_TBL, SAL_GRADE_TBL, SAL_PLAN_TBL
Sorted By	Salary Administration Plan, Salary Grade, Total Evaluation Points (descending order)



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Compa-Ratio Analysis Report

The Compa-Ratio Analysis report compares an employee’s salary to the others in the same salary grade.

---

### Compa-Ratio Analysis Report Page

Usage	Use this run control page to run the Compa_Ratio Analysis report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Compa_Ratio Analysis</b>
Access Requirements	Enter a Run Control ID.

Compa - Ratio Analysis Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language, As of Date.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

---

### Compa-Ratio Analysis Report

Description	The Compa-Ratio Analysis report compares an employee’s salary to the others in the same salary grade.
Report ID	CMP003
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATA

Source Records	EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA
Sorted By	Salary Administration Plan, Salary Grade, Job Code, Employee Name

The report lists each employee in the salary grade and the midpoint amount of the salaries in that grade. For each employee, the report lists job code, title, name, and Department ID. The report displays those employees whose Employee Status is *Active*, *Leave of Absence*, *Suspended*, or *Leave with Pay*.

The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the employee’s salary to the midpoint amount of the salary grade. If the employee’s current rate is the same as the midpoint, the compa-ratio is 1.00—or one hundred percent of the midpoint.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Below Minimum Analysis Report

The Below Minimum Analysis report lists all employees whose annual rate is below the minimum amount for the salary grade.

### Below Minimum Analysis Report Page

Usage	Use this run control page to run the Below Minimum Analysis report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Below Minimum Analysis</b>
Access Requirements	Enter a Run Control ID.

Below Minimum Analysis

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Language:

---

Report Request Parameter(s)

As Of Date:

Below Minimum Analysis Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language, As of Date.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

### Below Minimum Analysis Report

Description	The Below Minimum Analysis report shows employees making less than the minimum amount in their salary grade.
Report ID	CMP004
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATA
Source Records	EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA
Sorted By	Salary Administration Plan, Salary Grade, Job Code, Employee Name

The report lists the salary grades containing employees under the minimum, the associated minimum amount, the employee’s annual rate, and the amount below both in dollars and as a percentage. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended, or Leave with Pay.*



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

### Generating the Above Maximum Analysis Report

The Above Maximum Analysis report lists all employees whose annual rate is above the maximum amount for the salary grade.

## Above Maximum Analysis Report Page

Usage	Use this run control page to run the Above Maximum Analysis report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Above Maximum Analysis</b>
Access Requirements	Enter a Run Control ID.

Above Maximum Analysis Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language, As of Date.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

## Above Maximum Analysis Report

Description	The Above Maximum Analysis report lists all employees whose annual rate is above the maximum amount for the salary grade.
Report ID	CMP005
Type of Report	SQR
Parameters	As of Date
Source	RUNCTL_ASOFDATA
Source Records	EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA.
Sorted By	Salary Administration Plan, Salary Grade, Job Code, Employee Name

For each employee, the report shows the job code and title, name, department ID, the maximum amount, the employee’s annual rate, and the amount above maximum both in currency and as a

percentage. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended, or Leave with Pay*.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Automated Step Increase Report

This report enables you to view the automated step increase changes that will be made to employees' Job records before you decide to run the related database agent to actually update the Job records. The report displays the employees' previous and new Salary Plan, Grade, and Step.

### Automated Step Increase Report Page

Run this report as the second step in the three-step procedure you follow to run the Automated Step Increase process. All three steps are available in the Process Scheduler when you use the Automated Step Increase Process run control page.



For more information about this process and the Automated Step Increase Process run control page, see *Entering Salary Increases Using the Automated Step Increase Process*.

### Automated Step Increase Report

Description	After running the Automated Step Increase application engine process, you can run the Automated Step Increase SQR report. This report enables you to view the changes that will be made to employees' Job records before you decide to run the related database agent to actually update the Job records. This report displays the employees' previous and new Salary Plan, Grade, and Step.
Report ID	CMP007
Type of Report	SQR
Parameters	Business Unit, Salary Administration Plan, Start Date, End Date (through date), New Job Effective Date, Action Code, Reason Code, Excluding Criteria of No Review, Rating Scale, Review Rating, Total Review Points
Source	RUNCTL_STEPINCR

Source Records	PERSONAL_DATA, STEP_INCR_TMP
Sorted By	EmplID



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary Change Mass Update by Salary Plan/Pay Group Report

Generate this report after running the Update by Salary Plan/Pay Group application engine process. The report displays the employees' previous and new compensation package. Run the database agent to load all of the data to the Job Data records.

---

### Salary Change Mass Update by Salary Plan / Pay Group Report Page

Run this report as the second step in the three-step procedure you follow to run the Update by Sal (salary) Plan / Paygroup process. All three steps are available in the Process Scheduler when you use the Update by Sal Plan / Paygroup Process run control page.



For more information about this process and the Update by Sal Plan / Paygroup Process run control page, see *Updating Salaries by Salary Plan / Pay Group Process*.

---

### Salary Change Mass Update by Salary Plan / Pay Group Report

Description	After running the Update by Salary Plan / Pay Group application engine process, you can run the Update by Salary Plan / Pay Group SQR report. This report enables you to view the changes that will be made to employees' Job records before you decide to run the related database agent to actually update the Job records. This report displays the employees' previous and new compensation package.
Report ID	CMP008
Type of Report	SQR

Parameters	Start Date, End Date, Show Components; Pay group parameters: Company and Pay Group; Salary Plan / Grade parameters: Business Unit, Salary Administration Plan, Salary Grade.
Source	RUNCTL_CMP008
Source Records	PERSONAL_DATA, CMP008_TMP
Sorted By	The SQR processes data in EmplID order.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary Change Mass Update by Percent, Amount, Points Report

Generate this report after running the Update by Percent, Amount, Points application engine process. The report displays each employee’s previous and new compensation rate. Run the database agent to load all of the data to the Job Data records.

---

### Salary Change Mass Update by Percent, Amount, Points Report Page

Run this report as the second step in the three-step procedure you follow to run the Update by Percent, Amount, Points process. All three steps are available in the Process Scheduler when you use the Update by Percent, Amount, Points Process run control page.



For more information about this process and the Update by Percent, Amount, Points Process run control page, see *Updating Salaries by Percent, Amount, or Points*.

---

### Salary Change Mass Update by Percent, Amount, Points Report

Description	After running the Update by Pct, Amount, Points application engine process, you can run the Update by Pct, Amount, Points SQR report. This report enables you to view the changes that will be made to employees’ Job records before you decide to run the related database agent to actually insert new Job records. This report displays each employee’s previous and new compensation rate.
Report ID	CMP009

Type of Report	SQR
Parameters	New Job Effective Date, Action, Reason Code; Changed Components: Rate Code, Change Amount, Percent Amount, Change Percent, Change Points, Percent of Points, Currency, and Frequency.
Source	RUNCTL_CMP009
Source Records	PERSONAL_DATA, CMP009_TMP
Sorted By	The SQR processes data in EmplID order.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary Mass Update by Job Code Report

Generate this report after running the Update by Job Code application engine process. The report displays the employees' previous and new Salary Admin Plan, Grade, and Step. Run the database agent to load all of the data to the Job Data records.

### Salary Mass Update by Job Code Report Page

Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the Process Scheduler when you use the Update by Job Code Process run control page.



For more information about this process and the Update by Job Code Process run control page, see *Updating Salaries by Job Code Process*.

### Salary Mass Update by Job Code Report

Description	After running the Update by Job Code application engine process, you can run the Update by Job Code SQR report. This report enables you to view the changes to the Salary Administration Plan, Grade and/or Step that will be made to employees' Job records before you decide to run the related database agent to actually insert new Job records. This report displays the employees' previous and new Sal Admin Plan (salary administration plan), Grade, and Step.
-------------	---

Report ID	CMP010
Type of Report	SQR
Parameters	Business Unit, Job Code, Start Date, End Date, Action, Reason Code
Source	RUNCTL_CMP010
Source Records	PERSONAL_DATA, CMP010_TMP
Sorted By	EmplID



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary History by Employee Report

The Salary History by Employee report provides information about each salary change for an employee during a specified time period.

### Salary History by Employee Report Page

Usage	Use this run control page to run the Salary History by Employee report.
Object Name	RUNCTL_CMP011
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Salary History by Employee, Salary History by Employee</b>
Access Requirements	Enter a Run Control ID.

Salary History by Employee

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

---

Report Request Parameter(s)

EmplID:    Show Components?

Salary History by Employee Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, EmplID.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

**Report Request Parameter(s)**

**Show Components**                      Select **Show Components** if you want to show details of step components on the report.

**Salary History by Employee Report**

Description	This report shows each salary change for an employee during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change. For each employee included, you'll find the employee ID, employee type, regular/temporary, and full-time/part-time.
Report ID	CMP011
Type of Report	Crystal
Parameters	EmplID
Source	RUNCTL_CMP011
Source Records	COMPSUMMRPT_VW
Sorted By	Effective Date



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

**Generating the Salary History by Group Report**

The Salary History by Group report provides information about the salary changes for the employees in a group during a specified time period.

**Salary History by Group Report Page**

Usage	Use this run control page to run the Salary History by Group report.
-------	--

Object Name	RUNCTL_CMP014
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Salary History by Group, Salary History by Group</b>
Access Requirements	Enter a Run Control ID.

Salary History by Group Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

### Report Request Parameter(s)

**Group ID** Enter the ID of the group for which you want to run this report.

**Show Components** Select **Show Components** if you want to show details of step components on the report.

### Salary History by Group Report

Description	This report shows the salary changes for the employees in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change. For each employee included, you'll find the employee ID, employee type, regular/temporary, and full-time/part-time.
Report ID	CMP014
Type of Report	Crystal
Parameters	Group ID
Source	RUNCTL_CMP014

Source Records	COMPSUMMRPT_VW, SAL_PLN_GRP_RES_TBL
Sorted By	SetID and Department



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Employee Review Audit Report

The Employee Review Audit report provides information about employees in the group who have completed the review process and those who have not.

### Employee Review Audit Report Page

Usage	Use this run control page to run the Employee Review Audit report.
Object Name	RUNCTL_PER008
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Manage Performance (USF), Report, Employee Appraisal Audit, Employee Review Audit</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Report, Employee Review Audit, Employee Review Audit</b></li> </ul>
Access Requirements	Enter a Run Control ID.

Employee Review Audit Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

#### Report Request Parameter(s)

**Group ID** Enter the ID of the group whose data you want to report.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

---

## Employee Review Audit Report

Description	The Employee Review Audit report lists employees in the group who have completed the review process and those who have not.
Report ID	PER008
Type of Report	SQR
Parameters	Group ID
Source	RUNCTL_PER008
Source Records	EMPLOYEES, EMPLOYEE_REVIEW, REVIEW_REVIEWER
Sorted By	Group ID, Employee Name

The report provides the following information for each employee in the group who has a completed review:

- The reviewer's name and weighting factor.
- The employee's rating scale and review rating.
- The average of the employee's review ratings over time.
- The employee's next review date.

You can use this report as a reminder to schedule interviews.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

---

## Generating the Departmental Salaries Report

This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each.

## Departmental Salaries Report Page

Usage	Use this run control page to run the Departmental Salaries report.
Object Name	RUNCTL_ASOFDATA_LC
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Departmental Salaries, Departmental Salaries</b>
Prerequisites	Run the Refresh Employees Table process.
Access Requirements	Enter a Run Control ID

Departmental Salaries

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Language:

### Departmental Salaries Report Page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

## Departmental Salaries Report

Description	This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each.
Report ID	PER012
Type of Report	SQR
Parameters	None
Source	RUNCTL_ASOFDATA_LC
Source Records	EMPLOYEES, JOB, PERSONAL_DATA
Sorted By	Department ID, Employee Name

This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each. Job data includes date hired, employee type (salaried,

hourly, or exempt), full or part-time, regular or temporary, job code, job title, and supervisor name.

Pay rate information includes pay group, salary grade, and pay rates broken down by hourly, daily, monthly, and annual amounts.

Department level totals include all employees, employee type, full or part-time employees, and regular or temporary employees. You'll also find a grand total for all departments.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Employee Compensation Changes Report

This reports provides information about employees who have had compensation rate changes within a selected time period.

### Employee Compensation Changes Report Page

Usage	Use this run control page to run the Employee Compensation Changes report.
Object Name	RUNCTL_PER013
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Employee Compensation Changes, EE Compensation Changes</b>
Access Requirements	Enter a Run Control ID.

EE Compensation Changes

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Language:

Report Request Parameter(s)

Start Date:

End Date:

Show Components?

Employee Compensation Changes Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

**Report Request Parameter(s)**

- Start Date** Enter the beginning date of the time period that you want to report.
- End Date** Enter the ending date of the time period that you want to report.
- Show Components** Select **Show Components** if you want to show details of step components on the report.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

**Employee Compensation Changes Report**

Description	This reports lists employees who have had compensation rate changes within a selected time period.
Report ID	PER013
Type of Report	SQR
Parameters	Start Date and End Date range
Source	RUNCTL_PER013
Source Records	EMPLOYMENT, JOB, PERSONAL_DATA
Sorted By	Department ID, Employee Name, Effective Date

The report lists the following information for each employee rate change: name, employee ID, date hired, employee type (salaried, hourly, exempt), job code/title, salary grade, and compensation rate.

The last four columns show the date of each compensation rate change, the amount and percentage of the change, and the job action that prompted it.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary History for Company Report

This report provides information about each salary change for an employee during a specified time period.

---

### Salary History for Company Report Page

Usage	Use this run control page to run the Salary History for Company report.
Object Name	RUNCTL_PER023
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Salary History for Company, Salary History for Company</b>
Access Requirements	Enter a Run Control ID.

Salary History for Company Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

#### Report Request Parameter(s)

**Start Date** Enter the beginning date of the time period that you want to report.

**End Date** Enter the ending date of the time period that you want to report.

**Show Components** Select **Show Components** if you want to show details of step components on the report.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

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## Salary History for Company Report

Description	This report shows each salary change for an employee during a specified time period.
Report ID	PER023
Type of Report	SQR
Parameters	Start Date and End Date
Source	RUNCTL_PER023
Source Records	EMPLOYMENT, JOB, PERSONAL_DATA
Sorted By	Department, Employee Name, Effective Date

For each salary change, the report lists the associated job action, effective date, the job code and title, salary grade, compensation rate, the monetary amount, and the percentage of the change. For each employee included, you'll find the employee ID, employee type, regular/temporary, and full-time/part-time.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

---

## Generating the EE Review Result Distribution Report

This report provides information about employee review results by group ID and review time period.

---

### EE Review Result Distribution Report Page

Usage	Use this run control page to run the EE (employee) Review Result Distribution report.
Object Name	RUNCTL_PER026
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, EE Review Result Distribution, EE Review Result Distribution</b>
Access Requirements	Enter a Run Control ID.

EE Review Result Distribution Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

**Report Request Parameter(s)**

- Group ID** Enter the ID of the group on which you want to report.
- Start Date** Enter the beginning date of the time period that you want to report.
- End Date** Enter the ending date of the time period that you want to report.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

**EE Review Result Distribution Report**

Description	This report shows employee review results by group ID and review time period.
Report ID	PER026
Type of Report	SQR
Parameters	Group ID, Start Date, End Date
Source	RUNCTL_PER026
Source Records	REVIEW_DISTRIB, REVW_SCALE_TBL, MERIT_GROUP_TBL, SAL_PLAN_GRP_RES, EMPLOYEE_REVIEW
Sorted By	Group ID, review time period, employee.

For each employee the report lists ID, name, review date, review type, and review outcome. The report also displays the desired and actual review result distribution and distribution variance. If

the distribution group is associated with a budget ID, the report shows the desired and actual budget and budget variance.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary Grade Table Report

This report provides salary grade information from the Salary Grade Table.

### Salary Grade Table Report Page

Usage	Use this run control page to run the Salary Grade Table report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Salary Grade Table</b>
Access Requirements	Enter a Run Control ID.

Salary Grade Table

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Salary Grade Table Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

### Salary Grade Table Report

Description	This report lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.
Report ID	PER706A

Type of Report	Crystal report
Source	PRCSRUNCNTL
Source Records	SAL_GRADE_TBL
Sorted By	SetID, Salary Grade.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Salary Grade/Step Tables Report

This report provides salary grade and step information from the Salary Grade/Step Table.

### Salary Grade/Step Tables Report Page

Usage	Use this run control page to run the Salary Grade/Step Tables report.
Object Name	RUNCTL_PER706B
Navigation	<ul style="list-style-type: none"> <li>• <b>Administer Workforce, Administer Workforce (GBL), Report, Salary Grade/Step Table, Salary Grade/Step Tables</b></li> <li>• <b>Administer Workforce, Administer Workforce (USF), Report, Salary Grade/Step Table, Salary Grade/Step Tables</b></li> <li>• <b>Administer Workforce, Plan Salaries (GBL), Report, Salary Grade/Step Tables, Salary Grade/Step Tables</b></li> </ul>
Access Requirements	Enter a Run Control ID.

Salary Grade/Step Tables

Run Control ID: 01 Report Manager Process Monitor Run

Language: English

Report Request Parameter(s)

Show Components?

Salary Grade/Step Tables Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

### Report Request Parameter(s)

**Show Components**                      Select **Show Components** if you want to show details of step components on the report.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

### Salary Grade/Step Tables Report

Description	The report lists the salary plans, grades and steps, the grade description and the date the grade is effective. It also shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.
Report ID	PER706B
Type of Report	Crystal
Parameters	Components
Source	RUNCTL_PER706B
Source Records	SAL_GRADE_TBL, SAL_RATECD_TBL
Sorted By	Set ID, Salary Grade, Salary Step



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Employee With Merit Report

The employee With Merit report lists all employees who have received a merit increase during the period entered on the parameter page.

### Employee with Merit Report Page

Usage	Use this run control page to run the Employee with Merit report.
-------	--

Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Employee with Merit</b>
Access Requirements	Enter a Run Control ID.

Employee with Merit Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

**Report Request Parameter(s)**

**Start Date** Enter the begin date of the period for which you want the system to report the data.

**End Date** Enter the end date of the period for which you want the system to report the data.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

**Employee With Merit Report**

Description	The employee With Merit report lists all employees who have received a merit increase during the period entered on the parameter page.
Report ID	PER041
Type of Report	SQR
Parameters	Start and end dates
Source	RUNCTL_FROMTHRU
Source Records	JOB, PERSONAL_DATA, COMPENSATION, REVW_SCALE_TBL

Sorted By	Company, location, department, salary administration plan, grade, step, employee ID
-----------	---

**Criteria for Selecting Employees With a Merit Increase**

An employee is listed on this report if the following conditions are met during the time period specified:

- The employee’s summation-type employee review on the Employee Review pages has Approved status.
- The review result has been loaded to the Job record using the Review Result to Job Data process.

This process inserts a new row into Job, updating the employee’s compensation package. The effective date is the employee review effective date. The rate code inserted is the rate code associated with the rating scale in the review rating scale table.

- If the rating scale in the Job data record and the rate code in the Compensation record are the same as those defined in the Rating Scale table, the employee is listed on the report.

**Calculating Percents and Averages**

The report displays compensation rates and percents at the level of the employee. At the end of the list for the company location, it displays the average comp rates and percents for the company location. At the end of the report it displays the average comp rates and percents locations in the company.

<b>Comp Rate</b>	The employee’s compensation rate.
%	For each employee, the report displays a percent by calculating the employee’s comp rate / comp rate of all employees during the period.
<b>Average Comp Rate</b>	For each company location, the report displays the average compensation rate by calculating the sum of all compensation rates / number of employees in the company location.
<b>Average %</b>	For each company location, the report displays the average percent by calculating the sum of the employee % / number of employees in the company location.
<b>Total Average Comp Rate</b>	At the end, the report displays the total average comp rate of all companies by calculating the Average Comp Rate of all company locations / the number of employees in all company locations.
<b>Total Average Percent</b>	At the end, the report displays the total average percent of all companies by calculating the sum of the Average % of all company locations / the number of employees in all company locations.

<b>Comp Rate</b>	The employee's compensation rate.
<b>%</b>	For each employee, the report displays a percent by calculating the employee's comp rate / comp rate of all employees during the period.
<b>Average Comp Rate</b>	For each company location, the report displays the average compensation rate by calculating the sum of all compensation rates / number of employees in the company location.
<b>Average %</b>	For each company location, the report displays the average percent by calculating the sum of the employee % / number of employees in the company location.
<b>Total Average Comp Rate</b>	At the end, the report displays the total average comp rate of all companies by calculating the Average Comp Rate of all company locations / the number of employees in all company locations.
<b>Total Average Percent</b>	At the end, the report displays the total average percent of all companies by calculating the sum of the Average % of all company locations / the number of employees in all company locations.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

## Generating the Employee Without Merit Report

The Employee Without Merit report lists the employees who do not meet the criteria of the Employee With Merit report for the specified time period.

### Employee Without Merit Report Page

Usage	Use this run control page to run the Employee without Merit report.
Navigation	<b>Administer Workforce, Plan Salaries (GBL), Report, Employee without Merit</b>
Access Requirements	Enter a Run Control ID.

Employee without Merit

Run Control ID: 01 Report Manager Process Monitor

Language: English

**Report Request Parameter(s)**

Start Date:

End Date:

Employee without Merit Report page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Language.**

**Report Request Parameter(s)**

**Start Date** Enter the begin date of the period for which you want the system to report the data.

**End Date** Enter the end date of the period for which you want the system to report the data.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

---

**Employee Without Merit Report**

Description	This report lists all employees who have not received a merit increase during the period entered on the parameter page. All employees not selected by the criteria of the Employee with Merit report are listed on this report.
Report ID	PER042
Type of Report	SQR
Parameters	Start and end dates
Source	RUNCTL_FROMTHRU
Source Records	JOB, PERSONAL_DATA, COMPENSATION, REVW_SCALE_TBL
Sorted By	Department, salary administration plan, grade, step, employee ID.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or *PeopleSoft HRMS Reporting Tools* (for hard copy users).

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