

PeopleSoft Human Resources PeopleBook: Plan Salaries

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www4.peoplesoft.com/cc

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section

of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at **callcenter@conpub.com**.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	*Definition*
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	*Definition*
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	*Definition*
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	*Definition*
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province)**	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title — Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

Prefix and **Name Prefix** — Select a Prefix or Name Prefix, if applicable.

Royal Prefix — Select a Royal Prefix, if applicable.

First Name — Enter the employee's official first name.

Preferred First Name — For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.

Last Name Preference — For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.

Middle — Enter the employee's middle name, if applicable.

Last Name — Enter the employee's official last name.

Suffix — Select a suffix, if applicable.

Second Last Name — For Spanish employees, enter the second surname (mother's surname).

Alternate Character Name — Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters).

Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter.

Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.

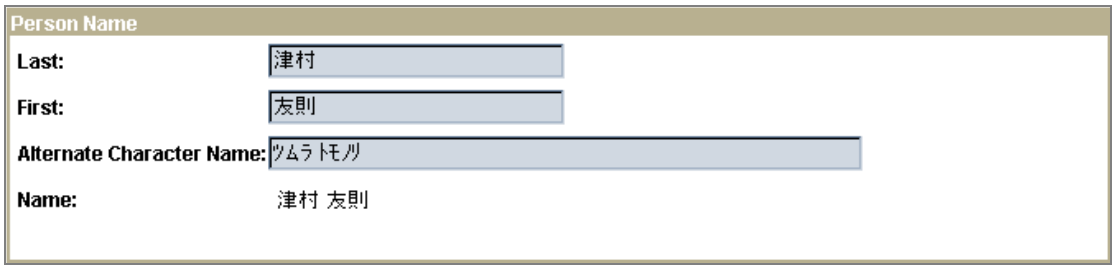
Royal Suffix — Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

Name — The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays "Last Name[space]First Name," not "Last Name,First Name"; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type	Enter the house type, if applicable.
Postal Search	Click **Postal Search** to use international address formats.

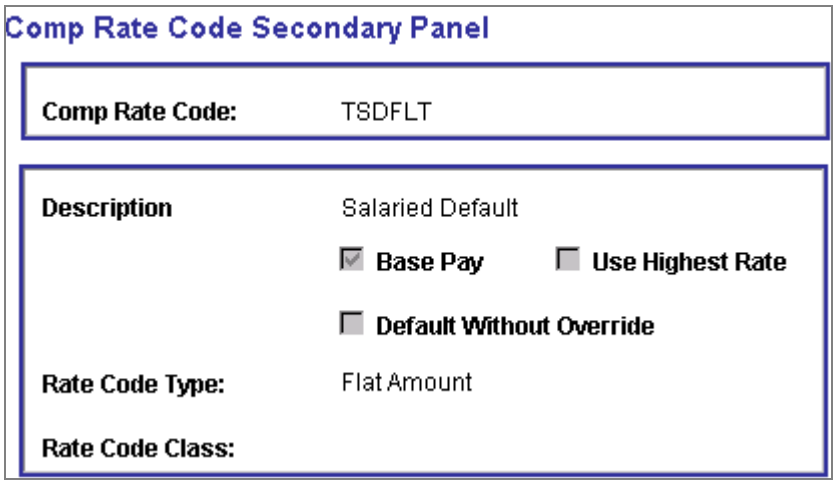
Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. **Note.** If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the **Details** button to open the Comp Rate Code Secondary Panel page.
Comp Rate, (compensation rate) **Currency**, and **Frequency**	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



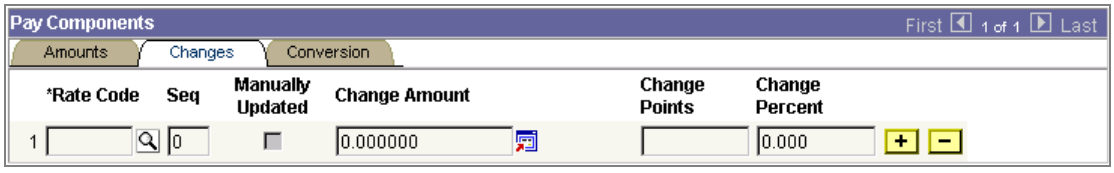
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

Changes Tab



Pay Components – Changes page

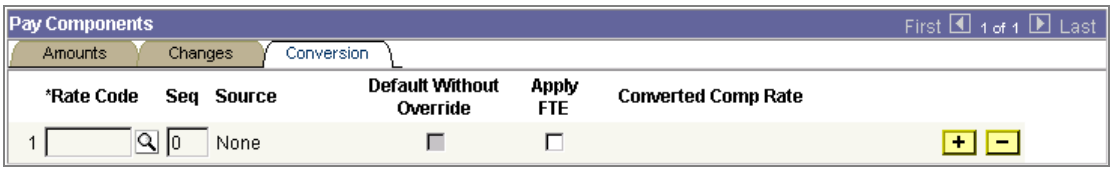
This page displays the change in an employee's salary.

Manually Updated The system selects this if you have manually updated the pay components.

Change Amount The overall change amount to this pay component rate.

Change Points The overall change amount (in points) to this pay component, if applicable.

Change Percent The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

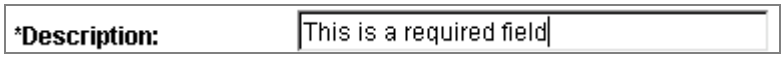
Default Without Override Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

Apply FTE Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.

Converted Comp Rate Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.



Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font` Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading "See Also." Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	*System Name*	*Navigation*	*Usage*
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Planning Salaries

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Planning Salaries.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	*Definition*
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	*Definition*
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports"

CHAPTER 2

Overview of Salary Planning

This chapter provides an overview of salary planning and shows you how to:

- Set up and administer salary administration plans.
- Set up and administer employee reviews.
- Set up and administer salary increase budgets and plans.
- Use other mass salary increase processes to update salaries.
- View summary data and reports.

Getting Started With the Plan Salaries Business Process

Here are several things to consider before you start using the Plan Salaries business process in PeopleSoft Human Resources.

Common Elements Used in This Chapter

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. This plan is 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.

Before You Begin

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

The following are some optional setup steps to consider:

- Enable workflow on the PeopleTools Workflow System Defaults page.

  Workflow is available in the 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook "Setting Up PeopleSoft HRMS"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Setting Up and Administering Salary Administration Plans

Using the Plan Salaries business process, you can create salary administration plans to assign default compensation packages to employees at the location, job code, or employee level. Use these salary plans to move employees through step increases manually or automatically.

Basic Salary Administration Plan Process

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.

See Also

"Setting Up Salary Plans, Grades, and Steps"

"Administering Salary Plans, Grades, and Steps"

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 that 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.

See Also

"Setting Up Salary Plans, Grades, and Steps"

"Reviewing Employee Performance"

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 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 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. Check the variance between the budget totals and the salary plan totals, approve the raises when you're satisfied, and 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.

See Also

"Setting Up Salary Plans, Grades, and Steps"

"Budgeting and Planning Salary Increases"

Note. Information from the employee's salary administration plan, such as compa-ratio, job 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 two processes to implement salary mass updates:

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

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

See Also

"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.

See Also

"Viewing Summary Salary Data"

CHAPTER 3

Setting Up Salary Plans, Grades, and Steps

This chapter provides an overview of setting up salary plans and tells you how to:

- Set up salary increases guidelines.
- Define salary plans.
- Define and view salary grades and steps.

Understanding 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 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.

Understanding the Setup Steps

Depending upon how your organization defines its salary structures, set up your salary plans as follows:

To set up salary plans, grades, and steps:

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

   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.

See Also

"Reviewing Employee Performance," Setting Up Employee Review Tables

Understanding Salary Plan Structure

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. Therefore, your salary plans are similar in terms of structure. However, for each plan, you establish different monetary values for the grade ranges and for the different pay components, amounts, percents, and salary points for the salary steps. In this way, you create unique plans with similar structures but with different compensation.

You then establish default compensation packages by tying the unique salary plans to different locations, job codes, or individual employees. This defaulting eases your administrative burden both at hire and when an employee has a job change. For example, 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. Define grades and steps in multiple currencies to accommodate your organization's needs.

The system uses the currency code that is specified for the organization as the default currency for the salary plan. The system uses the currency code that is specified for the salary plan as the default for all salary grades in the plan. It uses the currency code that is specified for the salary grade as the default for all steps within the grade. It uses the currency code that is specified on the Comp Rate Code Table as the default currency for the rate codes that are 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:

Salary Plan Level and Page	*Source of Default Currency Code*	*Use in Calculations*
Salary Plan Salary Plan Table setup page	The currency code that you selected for the organization on the Installation Table.	None (for defaulting only)
Salary Grade Salary Grade Table setup page	The currency code that 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 that 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 that 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working with Currencies"

Setting Up Salary Increase Guidelines

The Salary Increase Matrix Table is an optional setup table. Use this table only if you use matrix guidelines in your organization to plan salary increases. After you set up the initial matrix, 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 with a salary of $26,000 in a range of $25,000 - 30,000 for the salary grade would fall into the first quartile because 26,000 – 25,000 / 5,000 = 1/5, or .20, which is in the first quartile. When the system indicates that an amount is out of range, refer to the matrix to see the overall structure of percentage increase guidelines and make adjustments.

Page Used to Set Up Salary Increase Guidelines

Page Name	*Object Name*	*Navigation*	*Usage*
Salary Increase Matrix Table	SALARY_MATRIX_TBL	Administer Workforce, Plan Salaries (GBL), Setup, Salary Increase Matrix Table	Establish the minimum and maximum percentage increases permitted for each review rating by position in range.

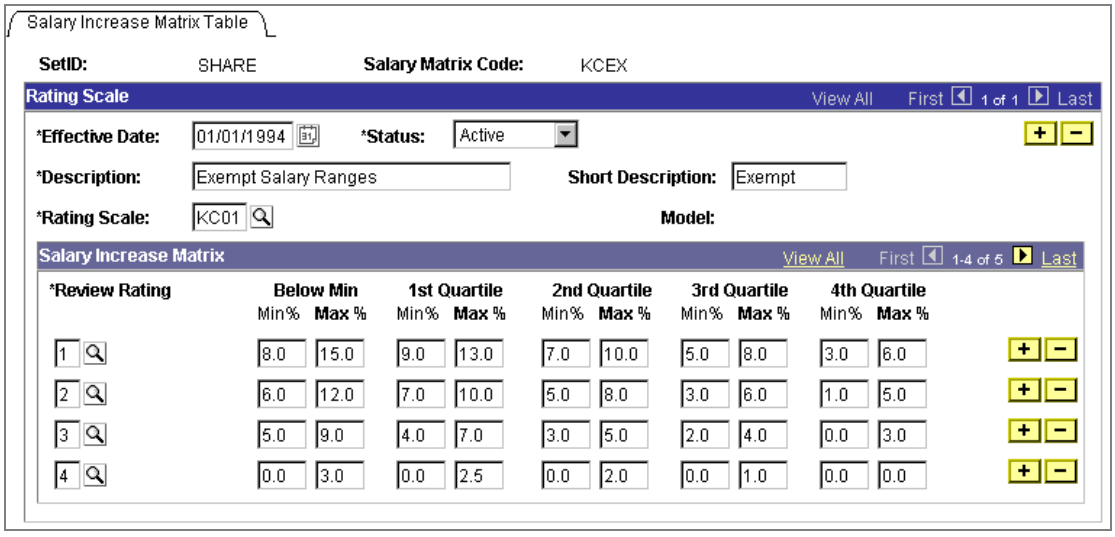
Note. The JPN Salary Increase Matrix Table page is identical to the Salary Increase Matrix Table page, but is specific to Japanese users.

See Also

"Updating Salaries for Japan," Updating Salaries by Percentages

Defining a Salary Increase Matrix

Access the Salary Increase Matrix Table page.



Salary Increase Matrix Table page

Rating Scale

Rating Scale Select a rating scale of Average type to associate with the matrix. Valid values are the rating scales that you defined in the Rating Scale table.

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

Salary Increase Matrix

Review Rating	Select from the list of valid ratings in the rating model associated with the rating scale that you selected.
Below Min (below minimum)	Enter the percentage increase of an employee's existing salary. The system uses these percentages to calculate the salary increase amount in the Salary Increase Simulation Table. The below minimum range is for those employees whose salaries are below the amount for the first quartile. **Note.** This column is optional because some organizations do not permit salaries that are below the minimum.
First Quartile to **Fourth Quartile**	For each quartile, enter the percentage increase of an employee's existing salary. The system uses these percentages to calculate the salary increase amount in the Salary Increase Simulation Table. **Note.** The system has a formula for determining which quartile to use in the Salary Increase Simulation process. The formula uses the minimum and maximum amounts of the salary range for the salary plan or grade concerned. If the calculation returns a negative result, it indicates that the employee's salary is below the minimum and the system uses the below minimum percentage. If the calculation returns a result greater than 100, then the employee's salary is above the maximum. The system does not complete the salary increase simulation for the employee and reports the employee in the process error list.

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

Defining Salary Plans

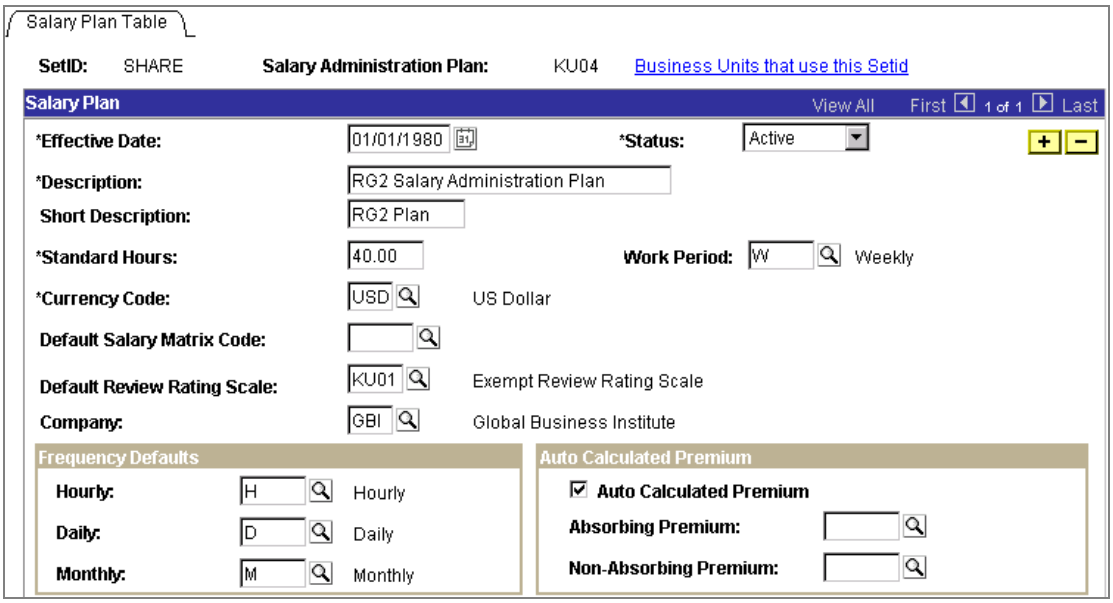
Use the Salary Plan Table page to define a unique salary plan ID and the default values for grades and steps within the plan.

Pages Used to Define Salary Plans

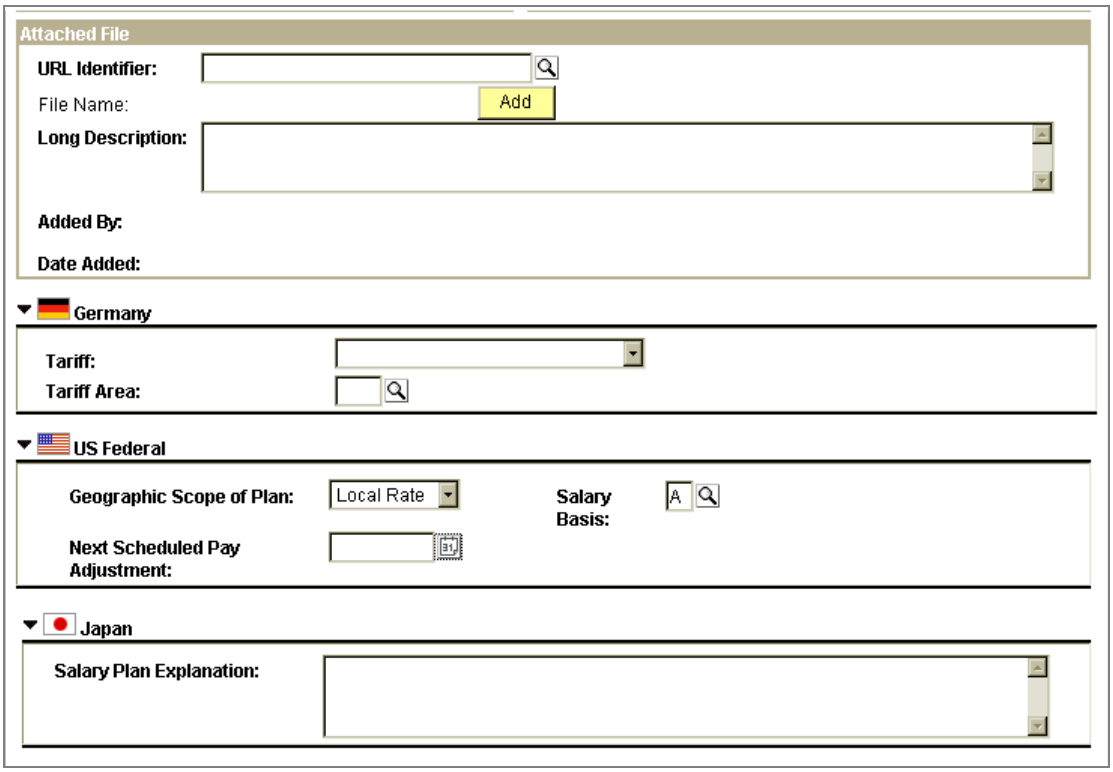
Page Name	*Object Name*	*Navigation*	*Usage*
Salary Plan Table	SALARY_PLAN_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Salary Plan Table, Salary Plan Table Administer Workforce, Administer Workforce (USF), Setup, Salary Plan Table, Salary Plan Table Administer Workforce, Plan Salaries (GBL), Setup, Salary Plan Table, Salary Plan Table	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.

Defining Salary Plan Characteristics

Access the Salary Plan Table page.



Salary Plan Table page (1 of 2)



Salary Plan Table page (2 of 2)

Salary Plan

Standard Hours — Enter the standard hours for this salary plan. The system uses this value (and the value in **Work Period**) in frequency conversions for compensation rate codes that are defined with hourly frequency.

Work Period — Enter the work period in which the standard hours should be completed.

Default Salary Matrix Code — If you use salary increase guidelines matrices to plan salary increases, select a code. The system enters this matrix code as the default for each grade in the salary plan.

You establish salary matrix codes in the Salary Increase Matrix table. If you have not defined a salary matrix, you can enter this information later.

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 unless the system has been installed for Japan.

If you do not use salary matrices in your organization, select a Default Review Rating Scale. Your selection here appears as the default in the Salary Grade Table. You can override the default.

If you have not defined a review rating scale, you can enter this information later.

Company — Select to associate this plan with a particular company in your organization. This value is used in Salary Grade Tables to calculate the compensation rate for rate code type points (Salary Step Components). The Points value is defined by company. You create valid codes on the Company Table page.

Frequency Defaults

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

Auto Calculated Premium

Auto Calculated Premium — Select if employees assigned to this salary plan are eligible for a salary premium above the amount calculated by component defaulting.

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

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

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

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Salary Plans

Attached File

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

File Name — Displays the file name.



Click Add to add the file to this salary plan.

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

(GER) Germany

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

(USF) US Federal

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

(JPN) Japan

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

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up and Using Frequencies"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Managing Country Specific Workforce Data," (GER) Setting Up the German Works Council Business Process

Defining and Viewing Salary Grades and Steps

Here's how you define salary grades and steps:

1. 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.

2. Associate the salary grade with labor agreement categories.

3. Associate salary steps with salary components.

4. View summary results online or print a report.

When you save a salary grade, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the salary step. The system uses rate code defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

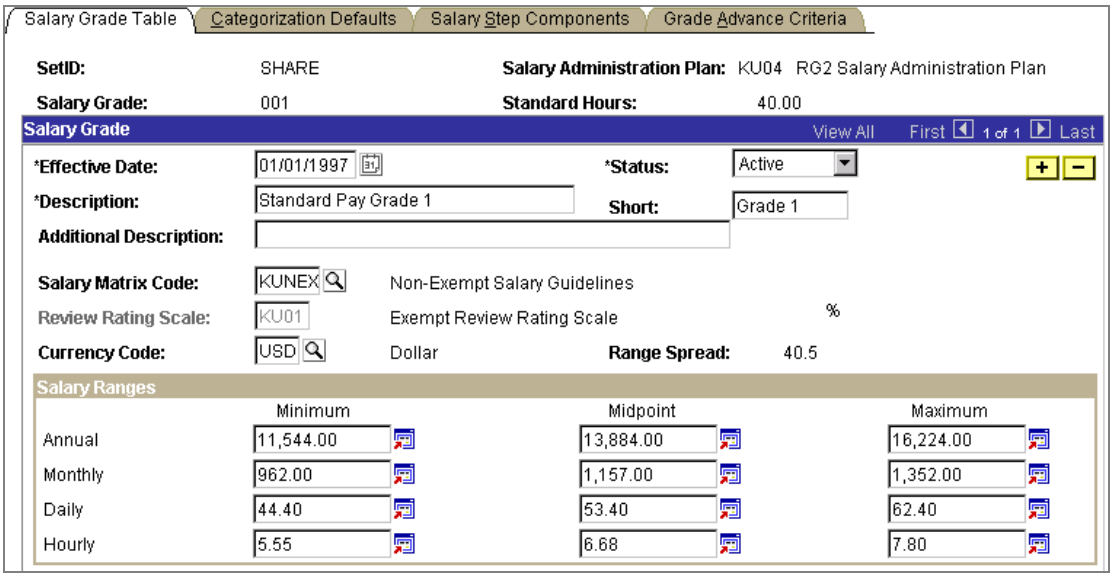
Pages Used to Define Salary Grades and Steps

Page Name	*Object Name*	*Navigation*	*Usage*
Salary Grade Table	SALARY_GRADE_TBL1	Administer Workforce, Plan Salaries (GBL), Setup, Salary Grade Tables, Salary Grade Table Administer Workforce, Administer Workforce (GBL), Setup, Salary Grade Tables, Salary Grade Table	Specify the minimum, maximum, and midpoint rates for salary grades. Set up several salary grades, in ascending or descending order, within the same salary administration plan. To create different ranges for the same salary grade, use separate salary administration plans for each.
Categorization Defaults	SALARY_GRADE2_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Salary Grade Tables, Categorization Defaults Administer Workforce, Plan Salaries (GBL), Setup, Salary Grade Tables, Categorization Defaults	Associate the salary grade with labor agreement categories and subcategories. Before using this page, define labor agreements, categories, and subcategories on the Employee Categorization page.
Salary Step Components	SALARY_GRADE_T3GBL	Administer Workforce, Administer Workforce (GBL), Setup, Salary Grade Tables, Salary Step Components Administer Workforce, Plan Salaries (GBL), Setup, Salary Grade Tables, Salary Step Components	Associate salary components with salary steps within a salary grade. The information that you set up here is used as default compensation data when your employees move into a specific step.
Comp Rate Code Secondary Panel	SAL_RATECD_SEC	Click the Details button on the Salary Step Components page.	View details of the rate code as defined on theComp Rate Code table.
(JPN) Grade Advance Criteria	SAL_GRD_REV_JPN	Administer Workforce, Plan Salaries(GBL), Setup, Salary Grade Table	Specify grade advance criteria used in the *Shohkaku* (Grade Advance) candidate process.

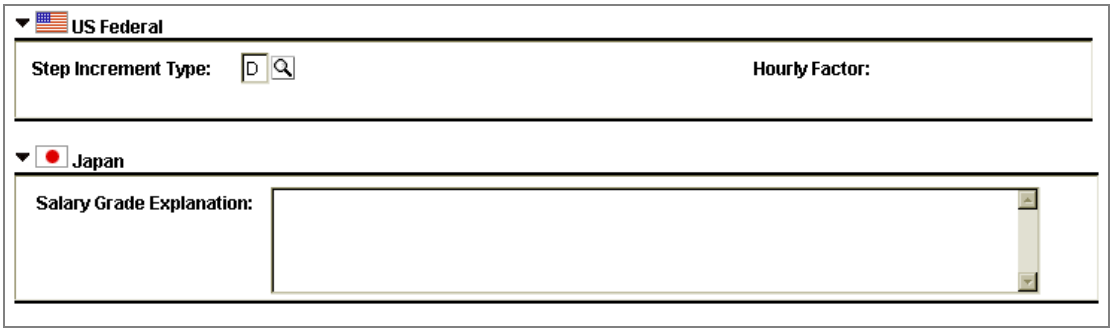
Page Name	*Object Name*	*Navigation*	*Usage*
Salary Structure Summary	SALARY_STRUCTURE	Administer Workforce, Plan Salaries (GBL), Inquire, Salary Structure Summary, Salary Structure Summary	View a summary of the salary structure online or print reports that summarize your grade structure or grade and step structure for each plan. This information is helpful when you plan salary increases.
(USF) Salary Grade Table	GVT_SAL_GRADE_TBL1	Administer Workforce, Administer Workforce (USF), Setup, Salary Grade Table, Salary Grade Table	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.
(USF) Salary Step Table	GVT_SAL_GRADE_TBL2	Administer Workforce, Administer Workforce (USF), Setup, Salary Grade Table, Salary Step Table	Associate salary components with salary steps within a salary grade. The information you set up here is used as default compensation data when your employees move into a specific step.

Setting Up Salary Grades

Access the Salary Grade Table page.



Salary Grade Table page (1 of 2)



Salary Grade Table page (2 of 2)

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

Salary Grade

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

Or, with the plan representing job category, you can use this field to identify the job class within the category if grades are named differently according to their job class.

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.

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 that is tied to the salary matrix. This default value is not available for change, except for Japan installed organizations. The default Salary Matrix Code and Review Rating Scale appears 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 you 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.

Currency Code

Displays the currency code that you selected for the Salary Administration Plan on the Salary Plan Table setup page. You can change the currency code.

Range Spread

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

Salary Ranges

Minimum and **Maximum**

Enter the minimum and maximum salary in either the **Annual, Monthly, Daily,** or **Hourly** row. Enter the range in one frequency; the system calculates the minimum and maximum in the other frequencies.

(USF) **BiWeekly** is also a frequency option.

Midpoint

The system calculates the midpoint as the maximum plus the minimum divided by two. You can override this default.

Annual, Monthly, Daily, and **Hourly**

Enter the annual, monthly, daily, or hourly salary range, depending on how you quote the salary for this grade. If you leave the rows blank the system calculates the values.

(JPN) Japan

Salary Grade Explanation

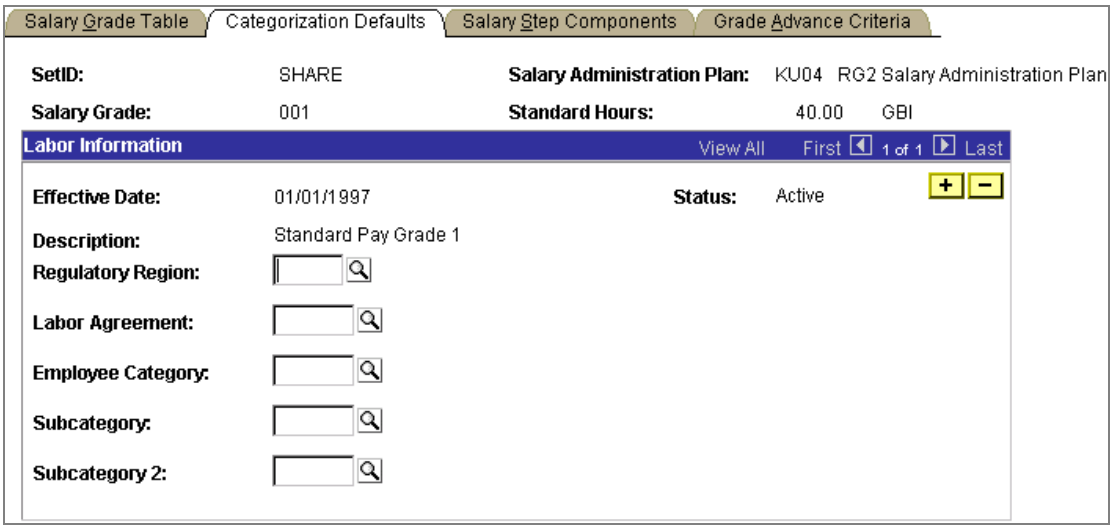
Use this field to store information such as capability grade requirements and the corresponding supervisor level.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up and Using Frequencies," Using Frequency With Compensation Rates

Associating Salary Grades With Labor Agreements

Access the Categorization Defaults page.



Categorization Defaults page

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

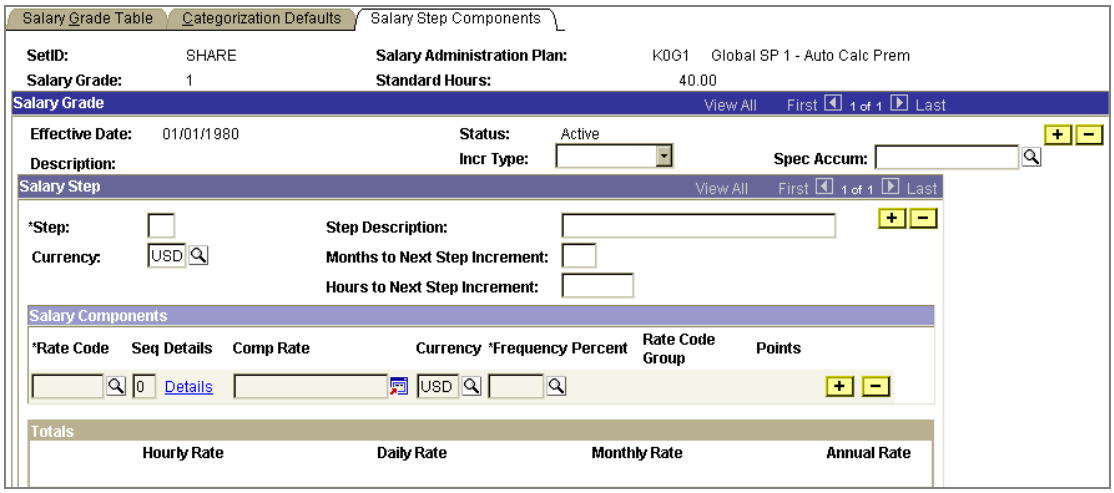
Employee Category, Subcategory, and **Subcategory 2** — Select, if necessary, from the available options.

See Also

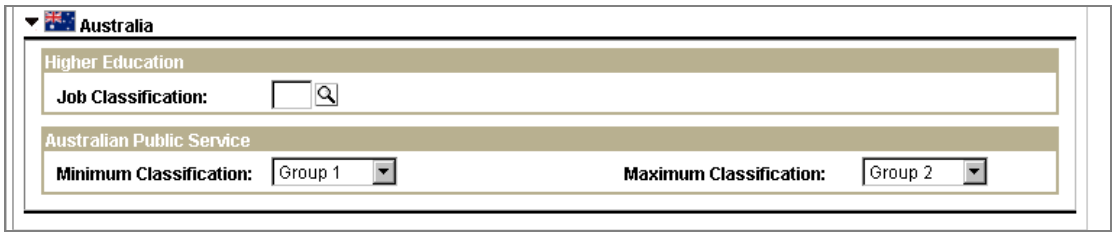
PeopleSoft Human Resources PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Defining Labor Agreements, Labor Agreement Categories, and Employee Classes.

Associating Salary Components With Salary Steps

Access the Salary Step Components page.



Salary Step Components page (1 of 2)



Salary Step Components page (2 of 2)

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

Salary Grade

Incr Type (increment type) If you plan to run a process that automatically moves an employee to the next salary step, select from the following valid values:

(None): Select to use no increments or to clear values that are entered in error.

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

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

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

Manual: Select to manually enter increments.

Weeks Based: This value is for U.S. 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.

Salary Step

Step — If you are defining a new step or modifying a step, enter the step number.

Currency — Select a currency code for the step. The system enters the currency code that 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 that you specify here.

Months to Next Step Increment — If you select 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 select 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 that 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 Compensation 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.

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 this button to view details of the selected rate code.

Comp Rate (compensation 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 a compensation rate for the rate code in 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.
Frequency	The system enters the default Frequency ID that 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 a percent for the rate code in 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 didn't select Rate Code Groups on the Installation Table.
Points	If the rate code type for this rate code is *Points,* assign points to the rate code for this salary step. Set up the value of each point at the company level on the Company Table. This field is hidden if you didn't select the Salary Points check box on the Installation Table.
Totals	The system calculates and displays the total value of the pay components that you assigned to the step. When you save the page, the system warns you if the total is outside the minimum or maximum ranges that you specified on the Salary Grade Table page.
Hourly Rate, Daily Rate, Monthly Rate, and **Annual Rate**	The system displays these total values of all the rate codes of the salary step.

(AUS) Australia

This group box appears only if the Education & Government check box on the Installation Table – Country Specific page has been selected.

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

See Also

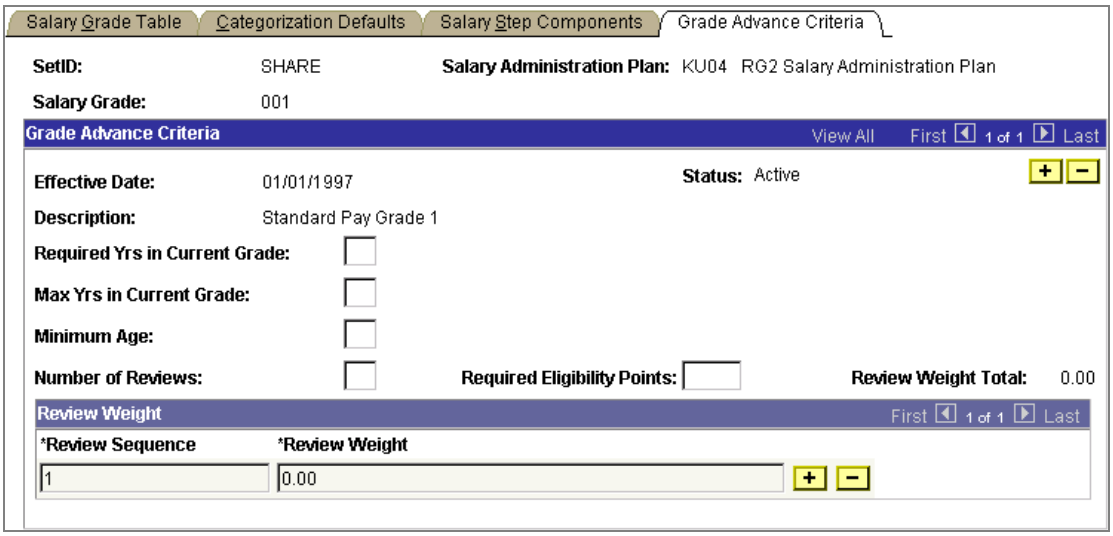
PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," Establishing Special Accumulator Types

Understanding Currency Defaulting and Conversion in Salary Plans

(JPN) Setting Grade Advance Criteria

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

Access the Grade Advance Criteria page.



Grade Advance Criteria page

Grade Advance Criteria

Required Yrs in Current Grade (required years in current grade)

Enter the number of years employees must be in this grade before they can advance from it. This is the minimum number of years required in the grade.

Max Yrs in Current Grade (maximum years in current grade)

Enter the maximum number of years employees can be in this grade. When checking for employees eligible for advancement from this grade, the system automatically includes those who have been in the grade this number of years, irrespective of all other criteria.

Minimum Age

Enter the minimum age employees must be to be eligible to advance from this grade.

Note. This refers to employees' education level age, not their real age.

Number of Reviews

Enter the number of reviews the results of which the system will use to assess an employee's eligibility to advance from this grade. If you enter 3, for example, the system will count the results from the most recent review, the review before that, and the review before that. Only reviews that have the Applicable for Grade Advance check box selected on the Review Definition page are included in this process.

Required Eligibility Points

This is the total number of eligibility points an employee must have attained to be eligible to advance from this grade.

Review Weight Total

The system keeps a running count of the weightings you add to the reviews in your **Review Sequence.** The total must be 100 when you have entered all the weightings. The system warns you if the sum of your weightings is not 100.

Review Sequence

Enter a sequence number for the **Number of Reviews** you specified. Sequence number ***1*** is the most recent review, ***2*** the review before that and ***3*** the review before that. The system uses the Review ID (which is a date) to associate the correct review with the correct sequence number and, therefore, the correct weighting.

Note. If you have more reviews defined as applicable for grade advance than you specify here, it doesn't matter. If you are only going back two reviews, the system ignores any earlier reviews even if they are defined as applicable for grade advance. You do not have to go back to the Review Definition page and clear the Applicable for Grade Advance check box. If the opposite is true—that is, you specify more reviews here than are defined as applicable for grade advance—the system warns that it was unable to get data when attempting to get review results.

If you don't want to weight the reviews, and are using the non-weighted average review method, just enter the **Number of Reviews** and leave the **Review Sequence** and **Review Weight** (next field) blank. The system will divide the review total by the number of reviews used in the calculation.

Review Weight

Unless you are using the non-weighted "simple average" method to determine the number of points, enter the weighting for each review in the sequence.

Weighted and Non-Weighted Sample Results

The decision to use weighted or non-weighted reviews has an affect on your results. In the examples that follow:

A = the employee's results.

B1 and B2 = settings for weighted and non-weighted (simple average) methods respectively.

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

A: Employee's Review Results

Review	*Final Review Band Code*	*Review Points*
Most Recent	A	80
Previous	S	100

B1: Weighted Method

Review	*Review Weight*
Most Recent	60%
Previous	40%

B2: Non-weighted (Simple Average) Method

No. of Reviews	*Review Weight*
2	N/A

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

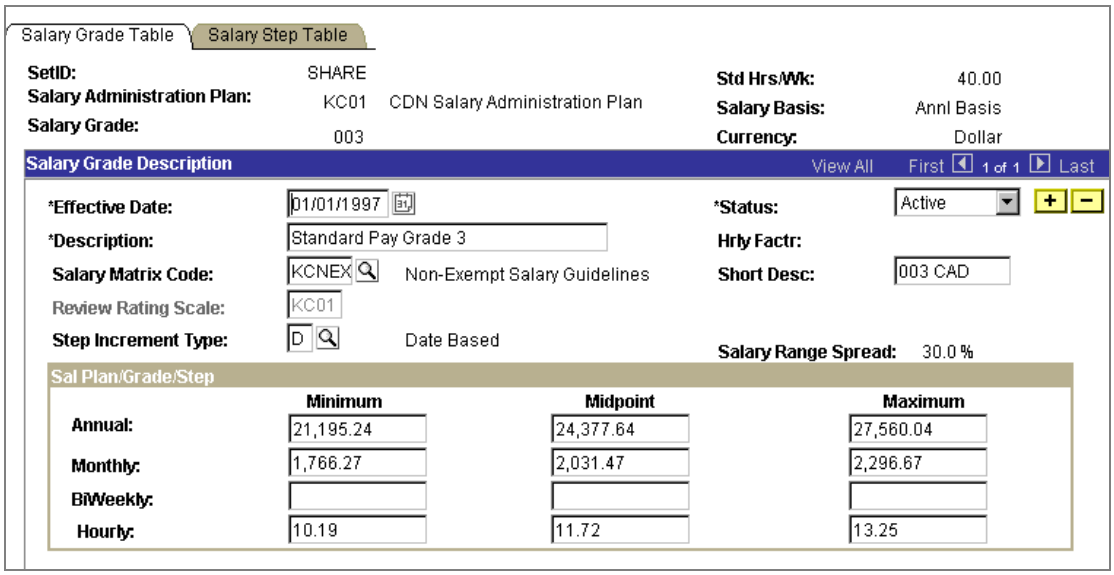
Review	*Final Review Band Code*	*Eligibility Points*	*Review Weight (from B1)*	*Result of Weighted Review*
Most Recent	A	80	60%	80 x 0.6 = 48
Previous	S	100	40%	100 x 0.4 = 40

C2: Result of Using Non-weighted (Simple Average) Method: = (80 + 100) / 2 = 90

Review	*Final Review Band Code*	*Eligibility Points*	*Result of Non-Weighted Average Review*
Most Recent	A	80	(80 + 100) / 2 = 90
Previous	S	100	(80 + 100) / 2 = 90

(USF) Setting Up Salary Grades

Access the Salary Grade Table page.



Salary Grade Table

This page is nearly identical to the Salary Grade Table page for commercial users, with the exception of a different object name and some field modifications.

Salary Basis This value defaults to an Annual Basis. When you start defining minimum, maximum, and actual step rates on the Salary Grade and Step tables, this field controls how you will input this data.

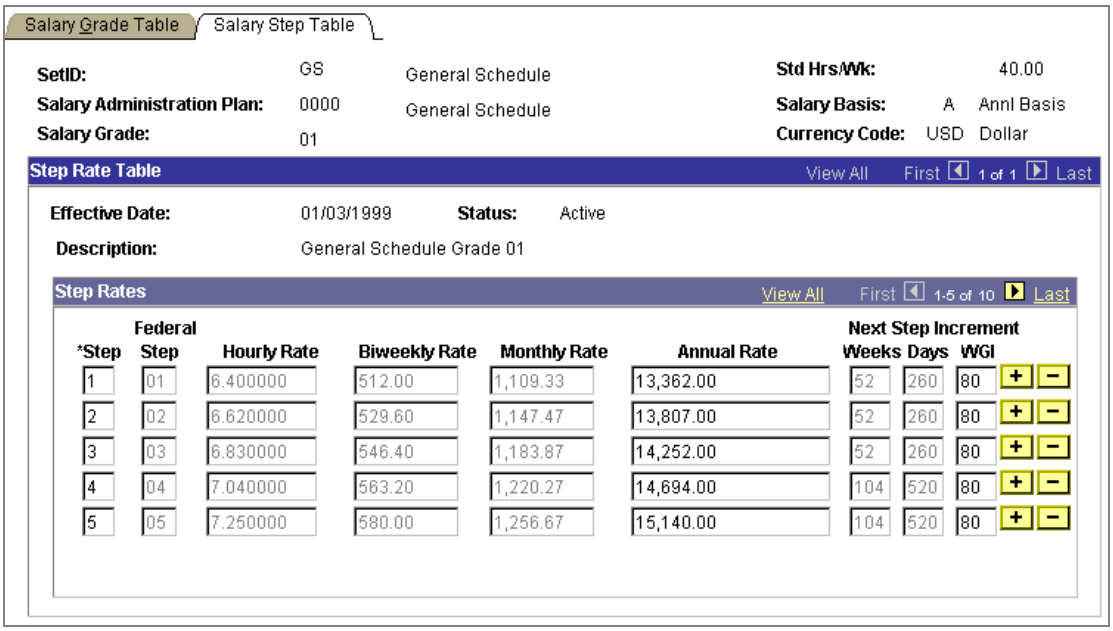
Step Increment Type The step increment determines the length of time before the next step increase.

Hrly Factor (hourly factor) Hourly conversion factor for salary basis that defaults to annual.

Instead of a Daily salary plan designation, you will see a **BiWeekly** designation for defining minimum, midpoint, and maximum rates for salary grades.

(USF) Establishing Salary Steps Within a Salary Grade

Access the Salary Step Table page.



Salary Step Table page

Salary Basis Displays the salary basis.

Federal Step The step that is associated with the Federal pay plan.

BiWeekly Rate The system displays the total biweekly rate value of all the rate codes of the salary step in the currency of the salary step.

Next Step Increment – Weeks The number of weeks before the employee is moved into the next step based on the employee's entry date into the step.

Next Step Increment – Days The number of days before the employee is moved into the next step based on the employee's entry date into the step.

Next Step Increment – WGI The WGI non-pay threshold. Indicates the number of hours of non-pay before WGI is effected.

CHAPTER 4

Administering Salary Plans, Grades, and Steps

This chapter tells you how to:

- Administer compensation with salary plan defaults.
- Administer salary increases.
- View employee salary structure information.
- Access related 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 page.
- Associate the salary plan with a job code on the Job Code table page.
- 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. The system verifies that any combinations of salary administration plans and grades that you select are valid and exist in the system. If the combination does not exist, the system issues a warning message.

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

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working with Multiple Components of Pay," Understanding Compensation Defaults

Tying Salary Plans to Job Codes or Locations

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

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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups" and "Working With Multiple Components of Pay," 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.

See Also

"Processing Mass Salary Increases"

"Budgeting and Planning Salary Increases"

Manually Entering Salary Changes in the Job Data Pages

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

If you use 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 that you enter against the values in the matrix. The system issues a warning message for amounts that are over or under the guidelines. You can still enter an out-of-range rate after you acknowledge the message. If you do not permit any out-of-range salaries in your organization, then change the warning to an error message so that no out-of-range salaries can be entered.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

Entering Salary Increases Using the Automated Step Increase Process

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

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

To run the Automated Step Increase process:

1. (Optional) Run the Late Reviews process to notify supervisors about employee reviews that are late. This process selects all employees whose last review effective date is on or before the date the process runs *and* whose next review date is before the date the process runs or have 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.
2. Run the process (CMP007) using PeopleSoft Application Engine to find the employees who are receiving a step increase and load this information to a temporary table.
3. Run the Automated Step Increase report to review all the data created by running PeopleSoft Application Engine.
4. Run the process (HR_SP_CI) using Application Engine to load all the data to the Job Data pages for your employees.

See Also

"Reviewing Employee Performance," Running the Late Reviews Process

Pages Used to Run the Automated Step Increase Process

Page Name	Object Name	Navigation	Usage
Automated Step Increase	RUNCTL_STEPINCR	Administer Workforce, Plan Salaries (GBL), Process, Automated Step Increase, Automated Step Increase	Automatically move employees to the next salary step when they have completed the required time in the current step.
(E&G) Load Auto Step Increments	RUNCTL_CMP107	Administer Workforce, Plan Salaries (GBL), Process, EG Automated Step Increment, Load Auto Step Increments	Automatically move employees to the next salary step when they have completed the required time in the current step.

See Also

PeopleTools PeopleBook: Process Scheduler

Common Automated Step Increase Elements

Salary Administration Plan Select the plan for which you are running the automated step increase.

Start Date and **End Date** Enter the start and end date of the period for which you want to process salary increases. Only employees who are in the specified salary plan within this time period are eligible for a step progression.

Job Effective Date If this salary plan has an hourly-based step progression, enter the job effective date.

If this salary plan has a date-based step progression, the job effective date is the previous step entry date plus the number of months required for the next step increase.

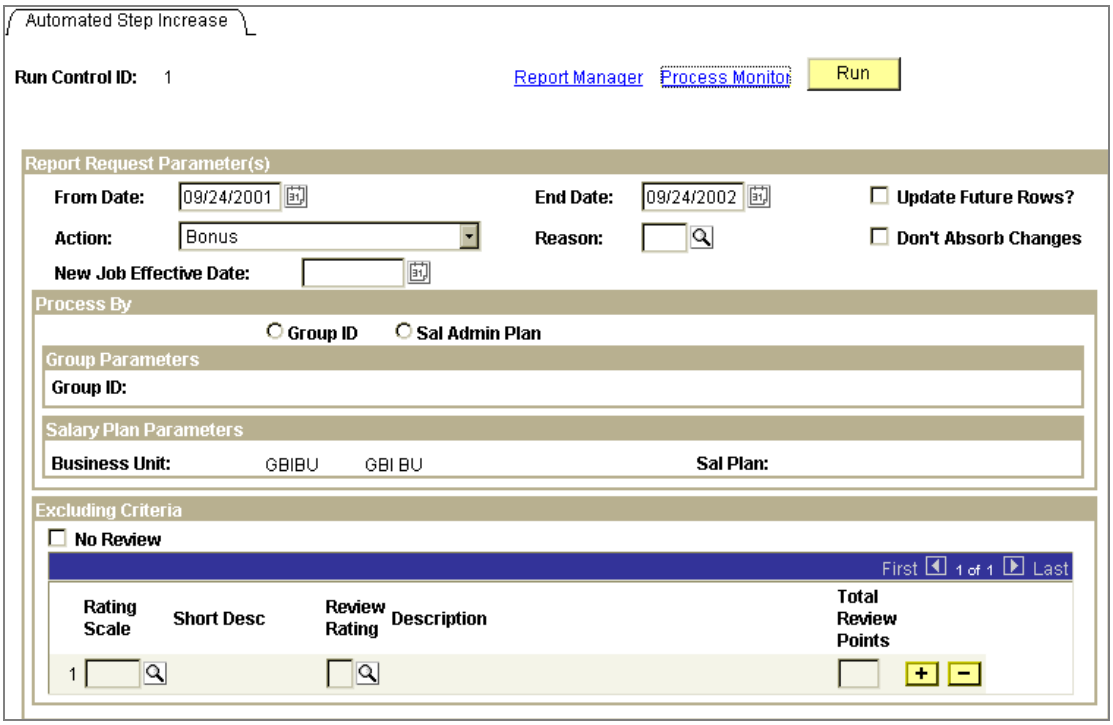
Exclusions

Rating Scale Select a rating scale for which you want to set minimum criteria. The system displays the associated **Rating Model.**

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

Moving Employees to the Next Step

Access the Automated Step Increase page.



RUNCTL_007 Automated Step Increase

From Date and **End Date** — Enter the date range you want to process.

Update Future Rows? — When you select this option, the process updates all existing future effective dated rows (rows that have an effective date later than the **End Date**) in addition to the effective dated rows it is adding.

Action and **Reason** — Enter the action and reason that are getting a step increase.

Don't Absorb Changes — Select to ensure that the salary premium of the processed employees does not absorb any salary changes even if the salary plan has an associated absorbing rate code.

This option only applies to employees who have a Target Comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

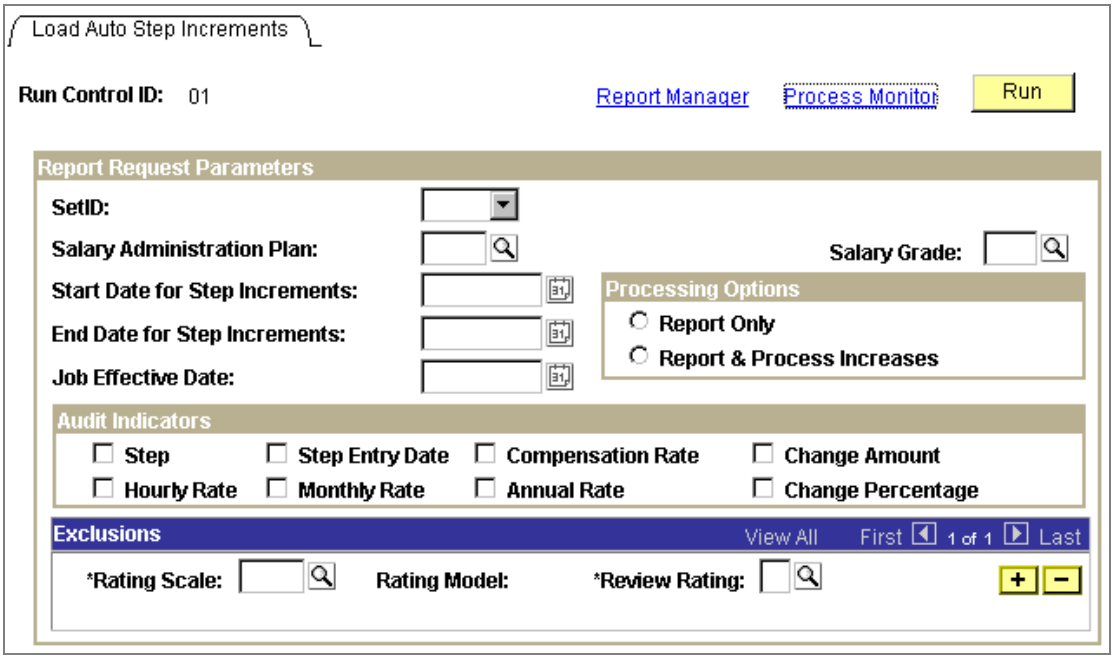
See Also:

"Setting Up Salary Plans, Grades and Steps," Defining Salary Plan Characteristics

New Job Effective Date	If using PeopleSoft Payroll for North America, enter the effective date of the new Job. Otherwise, the system calculates this date as: (actual step entry date) + (months to next step increment).
Process By	
Group ID	Select to process by Group ID. The Group ID field will become available for you to select the group ID of the employee group you want to process.
Sal Admin Plan (salary administration plan)	Select to process by salary administration plan. The Business Unit and Sal Plan fields will become available for you to select the salary plan you want to process.
Excluding Criteria	
No Review	Select to exclude employees from the increase because they have not yet received a review.
Total Review Points	Enter the minimum criteria for employees if the Rating Scale that you selected is a ***Summation*** scale type.

(E&G) Moving Employees to the Next Step

Access the Load Auto Step Increments page.



Load Auto Step Increments page

Start Date for Step Increments and **End Date for Step Increments**
Enter the start and end date of the period for which you want to process salary increases. Only employees who are in the specified salary plan during this time period are eligible for a step progression.

Processing Options

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

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

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

Viewing Employee Salary Structure Information

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

Viewing Salary Survey Data and 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. Enter salary amounts and associated job codes from the salary survey and view the midpoint pay rates for the salary grade tied to a job code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups."

Viewing Compa-Ratios

Use the compa-ratio calculation 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.

Viewing Range Calculations

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

The Range % indicates 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, then Range % = ((EE Salary - Min of Range)/EE Salary) x 100.
- If the employee falls above the Maximum Range, then Range % = ((EE Salary - Max of Range) x 100)/Max) + 100.
- If the employee falls in the Range, then Range % = ((EE Salary - Min of Range)/(Max - Min)) x 100.

Reporting Employee Salary Structure Information

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

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Plan Salaries Reports

CHAPTER 5

Reviewing Employee Performance

This chapter provides an overview of review rating scales and discusses how to:

- Set up and use review result distribution.
- Set up employee review tables.
- Conduct employee reviews.
- View employee review information.
- Process employee reviews.
- Report on employee reviews.

Understanding 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 the scale type that you are setting up.

In this section, we discuss setup details for each of the following scale types:

- Average.
- Summation.
- Review band.

Common Elements Used in This Chapter

Rating Model

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

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

Set up more than one rating model if appropriate for evaluating different categories of employees.

Rating Scale

Also known as Review Rating Scale. It 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, Summation, and Review Band.

Merit Scale

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.

Average Rating Scale Type

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

When you set up the Average rating scale, associate each competency with a percentage weight. When you evaluate an employee's performance in the employee review pages, 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.

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.

Example of Average Scale Calculation

In the following example, the rating model is a scale of 1 to 5, where 1 represents Outstanding and 5 represents Unacceptable. This employee's review rating is 1.7.

Competency	*Weight*	*Employee's Rating*
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 x 0.40) + (3 x 0.25) + (2 x 0.20) + (1 x 0.15) = 1.7

See Also

Setting Up Employee Review Result Distribution

"Administering Salary Plans, Grades and Steps," Administering Salary Increases

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, associate each rating in your rating model with review points for each competency that you include. 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 that 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 that you defined the resolution of points.

Methods for Resolving Points

On the Rating Scale Table - Rating Scale page, define one of the following four methods of resolving points:

- Amount per point.

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

- Percent per point.

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.

  Define the salary points per point, and select a rate code that the system uses to record the salary increase on the Compensation record. Select a rate code that has the rate code type: Points. Use Salary Points must be selected on the Installation Table; otherwise, the system displays the following message: "A rate type of 'Points' is not allowed for this installation."

- Merit Scale Table.

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, 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 Calculation

This example illustrates the following three processes:

- Assigning ratings and points.
- Calculating an employee's total review rating points.
- Resolving the points into a salary increase by the four resolution methods.

Points Assigned to Ratings and Competencies

Rating Model	*Decision Making*	*Team Work*	*Technical Skills*	*Communication*
1: Excellent	12 points	8 points	15 points	8 points
2: Very Good	8 points	6 points	10 points	6 points
3: Acceptable	5 points	4 points	6 points	4 points
4: Unacceptable	0 points	0 points	0 points	0 points

Employee Review Points Calculation

Competency	*Review Rating*	*Points*
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

Point Resolution	*Point Value*	*Increase*	*Applied to Compensation*
Amount	10 Deutsche Marks (DEM) per point	10 x 33 = 330 DM	Applied to the rate code specified on the Rating Scale Table.
Percent	.1% per point	.001 x 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 x 33 = 165 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 Merit Scale Table.	Amount, percent, or salary points, according to the resolution method that you defined for the point range on the Merit Scale Table.	Applied to the rate code specified on the Rating Scale Table or the rate code group (percent) specified on the Merit Scale Table.

Processing Summation Type Review Results

If you resolve summation type review points using a merit scale, verify and adjust the review result distribution before loading the employees' review results into their Job Data records.

When you are satisfied with the summation type review results, 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.

See Also

Setting Up Employee Review Result Distribution

Running the Review Results to Job Data Process

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, 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 that 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 that you defined review bands on the Merit Scale Table.

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

Here's how 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 Table - Rating Scale page.
    - Select competencies on the Rating Scale Table - Competencies page.
    - Assign ratings and points to the competencies on the Rating Scale Table - Ratings and Points page.

Setting Up Employee Review Result Distribution

You can define how you want employee review results to be distributed over a group population and optionally associate the group with a salary increase budget.

Here's how to set up and use employee review result distribution functionality:

1. Define an employee group using Group Build pages.

    Before setting up a review result distribution, use the Group Build pages to set up groups that are 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. Therefore, it is important that you accurately use the Group Build operand "in list" 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.

2. (Optional) Define a salary increase budget for the employee review group.
3. Define the desired review result distribution on the Review Result Distribution Setup page.

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.

Review the employees in the group using the **Employee** Review by Group page and the Employee Review page.

4. Verify the review result distribution on the Review Result Distribution Inquiry page.

5. Verify and adjust the review result distribution on the Employee Review Result Distribution Inquiry page.

6. Print the Employee Review Result Distribution report.

Examples of Review Result Distribution

The review result distribution option is available if you use an Average rating scale type, a Review Band rating scale type, or a Summation rating scale type 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

Review Rating	*Number of People With This Result*	*Desired Distribution*	*Actual Distribution*	*Variance*
1 - Excellent	20	10%	20%	+10%
2 - Good	50	50%	50%	0%
3 - Average	30	40%	30%	-10%

Review Band Rating Scale

Review Band	*Number of People With This Result*	*Desired Distribution*	*Actual Distribution*	*Variance*
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

Amount per Point	*Number of People With This Result*	*Desired Distribution*	*Actual Distribution*	*Variance*
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

Percent per Point	*Number of People With This Result*	*Desired Distribution*	*Actual Distribution*	*Variance*
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

Salary Points per Point	*Number of People With This Result*	*Desired Distribution*	*Actual Distribution*	*Variance*
15	20	10%	20%	+10%
10	50	50%	50%	0%
5	30	40%	30%	-10%

See Also

"Budgeting and Planning Salary Increases "

PeopleSoft Application Fundamentals For HRMS PeopleBook, "Working With Groups "

Setting Up Employee Review Tables

In this section, we discuss setting up employee review tables and how to:

- Define rating models.
- Define merit scales.
- Define rating scales.
- Associate competencies with rating scales.
- Assign ratings and points.
- Define the distribution of review results.

Understanding Employee Review Tables

Before you conduct employee reviews, define competencies, rating models, and rating scales. Depending on the rating scale that you use, you might need to define a merit scale table, review bands, or both. If you use review result distribution functionality, define the distribution.

Here's how to set up employee review tables:

1. Define competencies on the Competency Table page in the Manage Competencies business process.

Competencies are the criteria that you use to review employees, such as Leadership, Technical Knowledge, or Adaptability to Change. 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 that you assign when evaluating employee performance, such as Excellent, Good, Needs Improvement, and Unacceptable. Set up more than one rating model 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, then define alphabetic or numeric review band IDs.

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

   - You plan to set up a review result distribution with a Summation type rating scale.

     Resolve your review points using a merit scale.

   - You use a Review Band rating scale type.

     Assign a review band ID to each range of rating points.

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

   The following table illustrates how you use the Rating Scale Table pages for each rating scale types.

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

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

See Also

Understanding Review Rating Scales

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments," Setting Up Competency Ratings

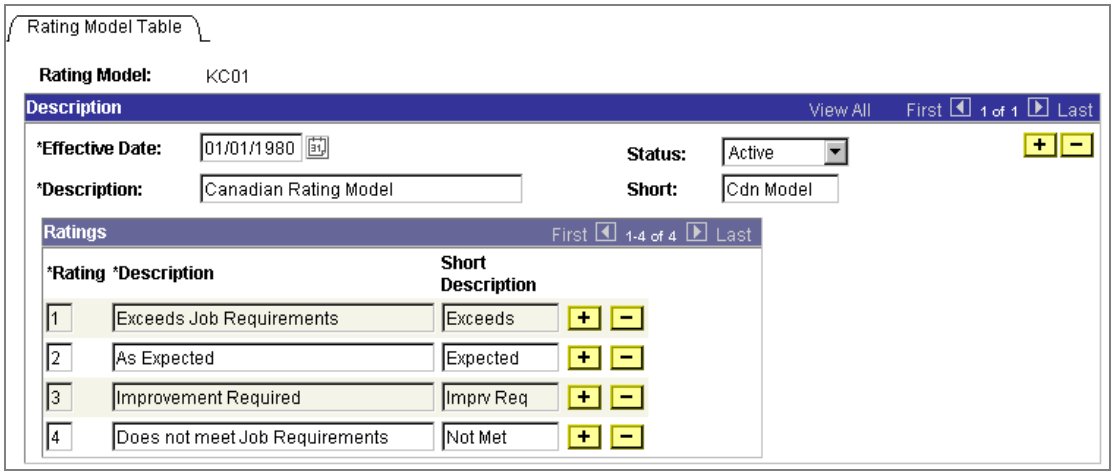
Pages Used to Set Up Employee Review Tables

Page Name	*Object Name*	*Navigation*	*Usage*
Rating Model Table	RATING_MDL_TBL	Administer Workforce, Plan Salaries (GBL), Setup, Rating Model Table, Rating Model Table Administer Workforce, Administer Workforce (GBL), Setup, Rating Model Table, Rating Model Table	Define a set of alphabetic or numeric codes for rating an employee's performance. Define more than one rating model for use with different rating scales.
Review Band Table	REVIEW_BAND_TBL	Administer Workforce, Plan Salaries (GBL), Setup, Review Band Table, Review Band Table	Define review bands that you can assign to ranges of review rating points on the Merit Scale Table.
Merit Scale Table	MERIT_SCALE_TBL	Administer Workforce, Plan Salaries (GBL), Setup, Merit Scale Table, Merit Scale Table Administer Workforce, Manage Performance (USF), Setup, Merit Scale Table, Merit Scale Table	Define groups of review result points. For each group, 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.

Page Name	Object Name	Navigation	Usage
Rating Scale	REVIEW_RATING_TBL1	Administer Workforce, Plan Salaries (GBL), Setup, Rating Scale Table, Rating Scale Administer Workforce, Administer Workforce (GBL), Setup, Rating Scale Table, Rating Scale Administer Workforce, Administer Workforce (USF), Setup, Rating Scale Table, Rating Scale Administer Workforce, Manage Performance (USF), Setup, Review Rating Table, Rating Scale	Define a rating scale, its rating model, and its type. For Summation scale types, define the method of resolving points into salary increases.
Competencies	REVIEW_RATING_TBL2	Administer Workforce, Administer Workforce (GBL), Setup, Rating Scale Table, Competencies	Associate specific competencies with your rating scale.
Ratings and Points	REVIEW_RATING_TBL3	Administer Workforce, Administer Workforce (GBL), Setup, Rating Scale Table, Ratings and Points	Assign a number of review rating points to each value in your rating model for each competency that you defined for the rating scale.
Review Result Distribution	REVIEW_RESULT_DIST	Administer Workforce, Plan Salaries (GBL), Setup, Review Result Distribution, Review Result Distribution	Define the distribution of employee review results. Use this optional setup page for rating scales when the rating scale type is Average or Review Band. Also use it for Summation rating scale types, if you resolve the point value by means of a merit scale.

Defining Rating Models

Access the Rating Model Table page.



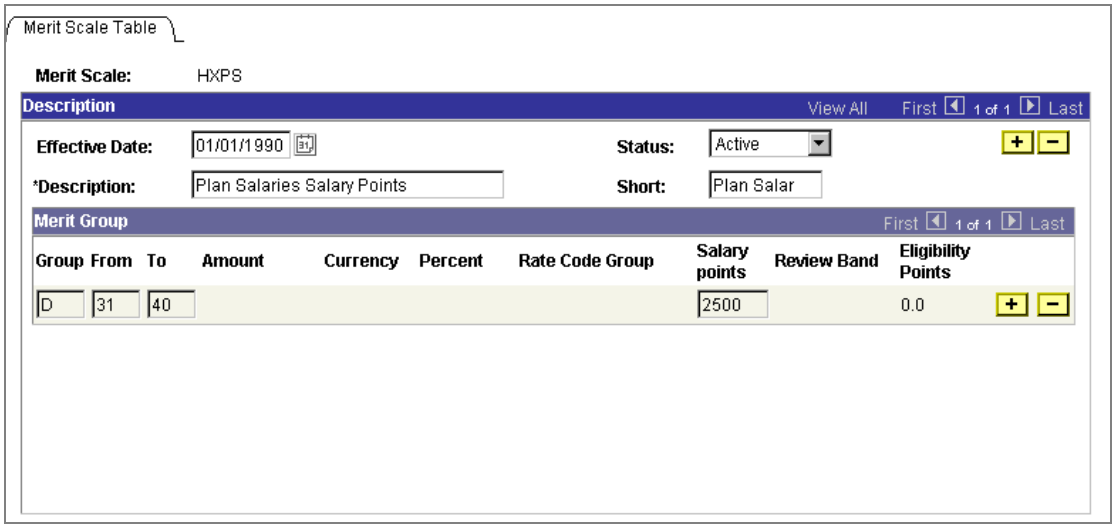
Rating Model Table page

Rating Enter an alphabetic or numeric code to represent the rating that you are defining.

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

Defining Merit Scales

Access the Merit Scale Table page.



Merit Scale Table page

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

Group	Enter an identifier for the first range of review points that you are defining. Enter a number, letter, or combination of the two.
From and **To**	Enter the beginning and the final 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.
Amount	If you resolve points in terms of a flat amount, hourly rate, or hourly rate plus flat amount, enter the amount that corresponds with this group of points.
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 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 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 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.

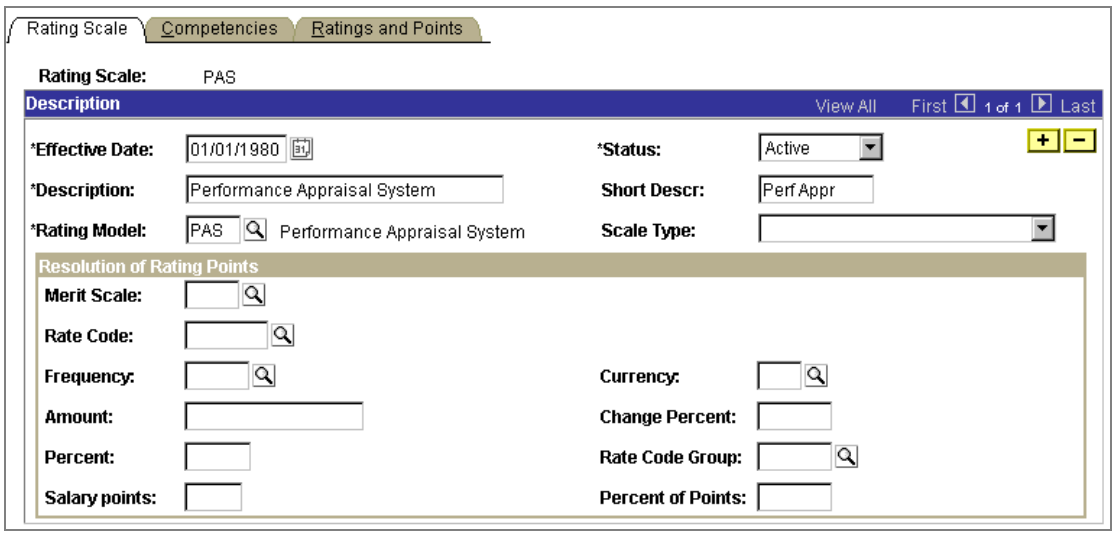
See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay "

Understanding Review Rating Scales

Defining Rating Scales

Access the Rating Scale Table - Rating Scale page.



Rating Scale Table - Rating Scale page

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

Scale Type Select 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 unavailable for entry.

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 entry with the exception of the Merit Scale field.

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

Resolution of Rating Points

Define how you want the system to resolve review rating points into salary increases using the following fields. 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.

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

Frequency

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

Amount

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.

For example, suppose that 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 USD annually. The employee earns 20 review points, so the system adds 2,000 USD to the employee's compensation for the rate code. The new annual compensation rate for NAANNL is 52,000 USD.

Change Percent

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.

For example, suppose that 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 USD.

Percent Enter the percent of the salary increase per review point if you selected Percent as the rate code type.

Rate Code Group Select the rate code group for which you want the percent increase to be calculated.

Salary Points Enter the number of salary points that 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.

For example, suppose that 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.

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.

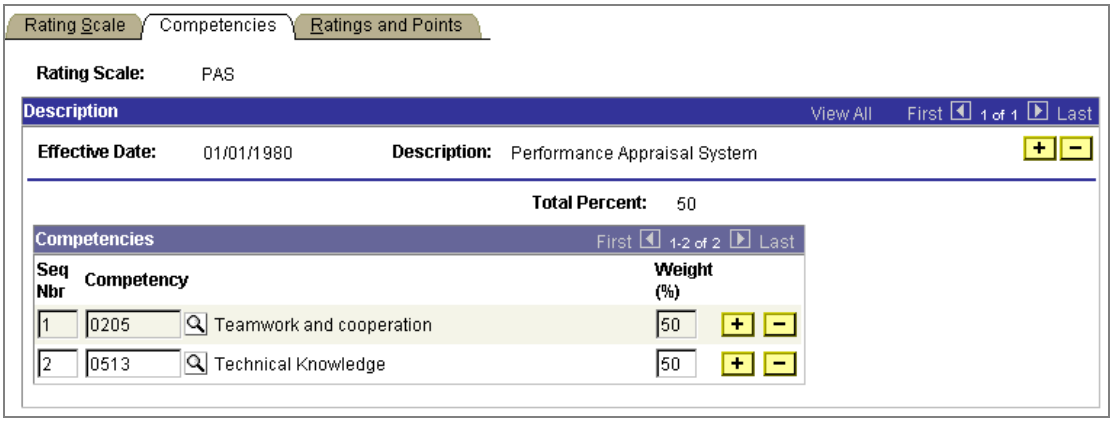
For example, suppose that an employee's current salary points for the selected rate code, NABP01, is 100 points. You define the value of each review point as 1 percent of salary points. The employee earns 30 review points, so the system adds 30 percent of the current salary points to the total salary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

See Also

Understanding Review Rating Scales

Associating Competencies With Rating Scales

Access the Rating Scale Table - Competencies page.



Rating Scale Table - Competencies page

Rating Scale The system displays the Rating Scale ID that 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.

Seq Nbr (sequence number) The system automatically numbers the rows in sequence.

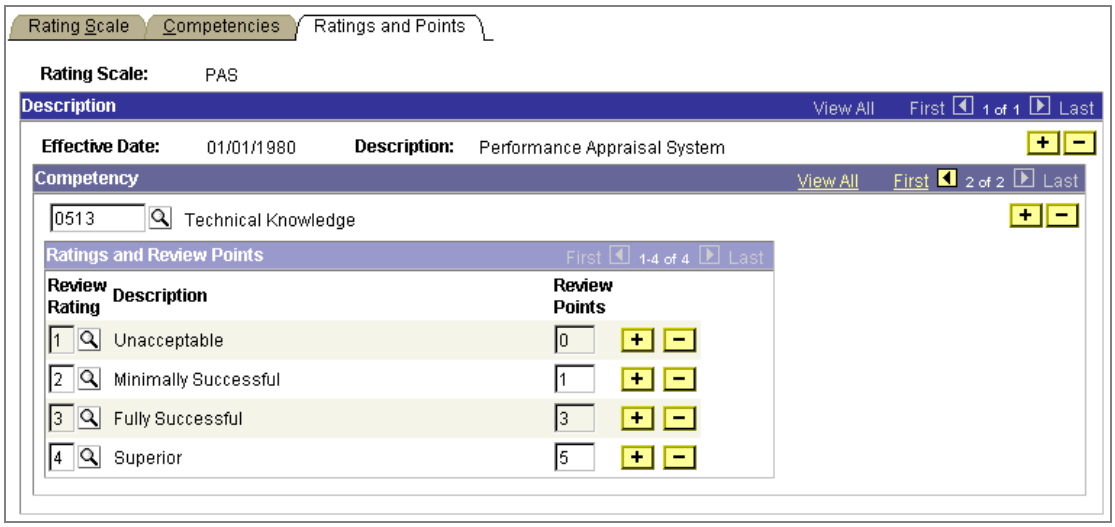
Competency Select a competency from the list of valid values, which you define on the Competency Table.

Weight (%) Enter a weighting percent for each competency. The total of all weighting percents must be 100.

This field is visible only if the Rating Scale Type is Average.

Assigning Ratings and Points

Access the Rating Scale Table - Ratings and Points page.



Rating Scale Table - Ratings and Points page

Note. Use this page only if the rating scale type is Summation or Review Band.

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

Competency Select one of the competencies that you defined for the rating scale using the scroll arrows, or add a new competency from the list of valid values.

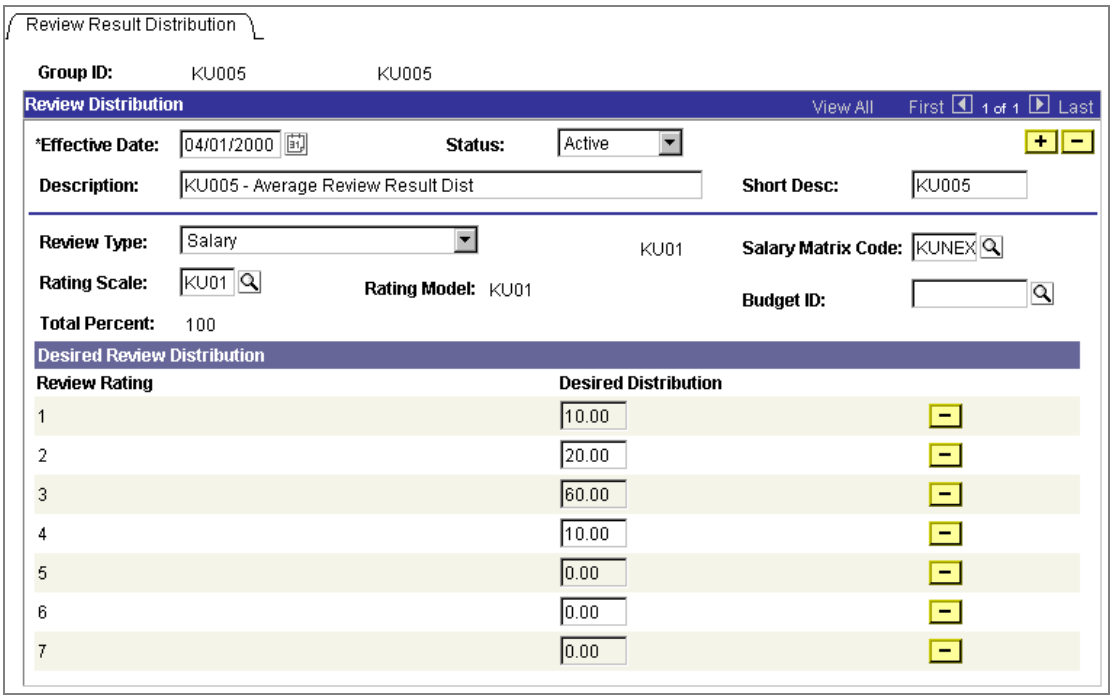
Review Rating Select from the values that you defined in your rating model.

Review Points Assign points to the selected review rating.

By assigning different review points to the same rating for different competencies, you can assign weights to the different competencies.

Defining the Distribution of Review Results

Access the Review Result Distribution page.



Review Result Distribution page

Note. Visible fields vary by implementation.

Review Distribution

Review Type Select the type of review. This is important to verify that all members of the group receive identical reviews.

Salary Matrix Code 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.

Rating Scale Select the rating scale that you are using to evaluate this group of employees.

Rating Model The system enters the rating model associated with the rating scale on the Rating Scale Table.

Budget ID (Optional) Use this field 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.

Total Percent 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 when you save the page.

Desired Review Distribution

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

Group	The system enters the IDs that you assigned to groups (ranges) of points on the Merit Scale Table.
From and **To**	The system enters the beginning and end rating of each group.
Amount	(Summation scales) The system enters the amount that you defined on the merit scale for resolution of points in this group.
Percent	(Summation scales) The system enters the percent that you defined on the merit scale for resolution of points in this group.
Salary Points	(Summation scales) The system enters the salary points that you defined on the merit scale for resolution of points in this group.
Review Band	(Review Band scales) The system enters the review band that 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 want 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; this enables you to weigh 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.

In this section, we discuss how to:

- Define employee reviews.
- Record employee reviews.
- Record comments about the overall review.
- Review or specify employee goals and objectives.
- View a list of employees in a review group.

You'll find the Employee Review component in the Plan Careers menu. To enter review information, use either component; 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 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.

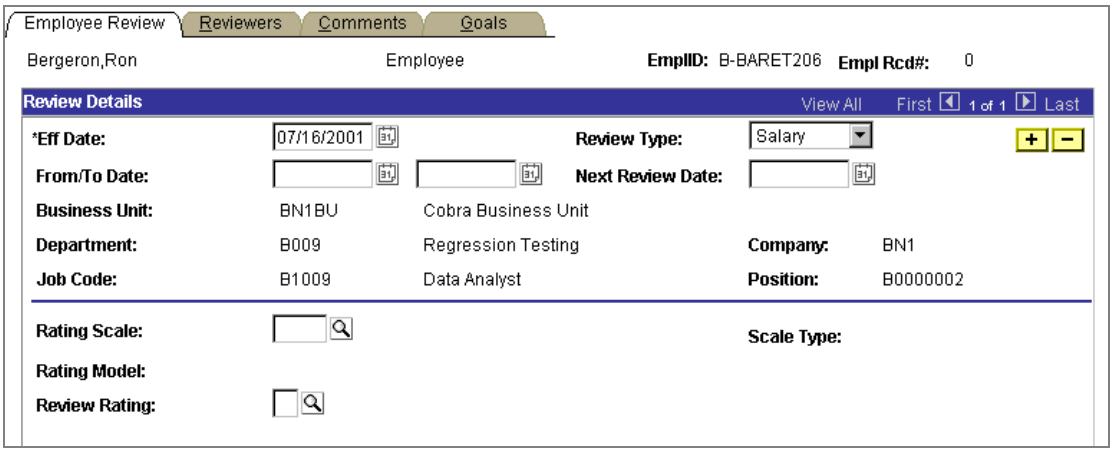
Pages Used to Conduct Employee Reviews

Page Name	*Object Name*	*Navigation*	*Usage*
Employee Review	EMPLOYEE_REVIEW_1	Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Employee Review Develop Workforce, Plan Careers, Use, Employee Review, Employee Review Develop Workforce, Plan Successions (GBL), Use, Employee Review, Employee Review	Record dates and results of employee reviews and select the rating scale.
Reviewers	EMPLOYEE_REVIEW_2	Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Reviewers Develop Workforce, Plan Careers, Use, Employee Review, Reviewers Develop Workforce, Plan Successions (GBL), Use, Employee Review, Reviewers	Use this page to conduct the employee review. Indicate the weighting factor for each reviewer. The system provides the list of competencies 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.
Reviewers: Comment	EMP_RVW_RATING_SEC	Click the button at the end of the grid row for the competency that you want to comment on.	Enter comments about an individual competency.

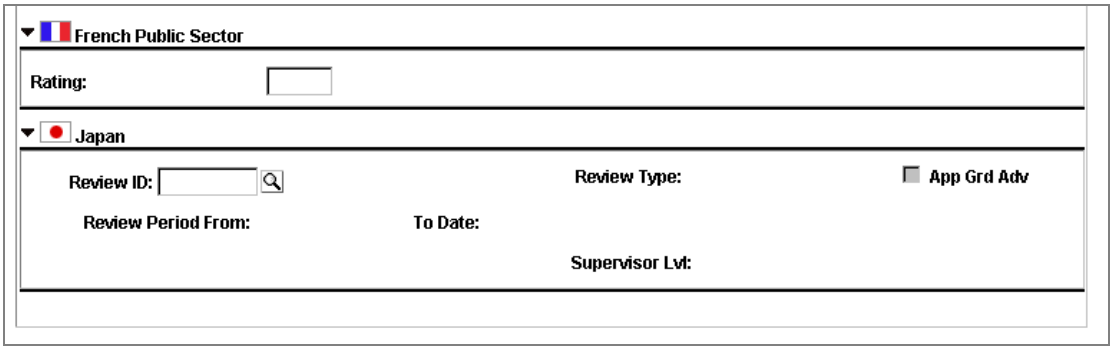
Page Name	Object Name	Navigation	Usage
Comments	EMPLOYEE_REVIEW_3	Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Comments Develop Workforce, Plan Careers, Use, Employee Review, Comments Develop Workforce, Plan Successions (GBL), Use, Employee Review, Comments	Enter comments about the overall review. The same reviewer can record comments related to reviews for different evaluation types. Enter comments of any length.
Goals	EMPLOYEE_REVIEW_4	Administer Workforce, Plan Salaries (GBL), Use, Employee Review, Goals Develop Workforce, Plan Careers, Use, Employee Review, Goals Develop Workforce, Plan Successions (GBL), Use, Employee Review, Goals	Review or specify employee goals and objectives. Include goals from the career plan. The system updates the employee's career plan with information entered here.
Employee Review by Group	EE_REVIEW_GRP	Administer Workforce, Plan Salaries (GBL), Use, Employee Review By Group, Employee Review By Group Develop Workforce, Plan Careers, Use, Employee Review By Group, Employee Review By Group	View a list of all employees in a review group during the current review period defined for the group. From this page, access the Employee Review page for each employee.

Defining Employee Reviews

Access the Employee Review page.



Employee Review page (1 of 2)



Employee Review page (2 of 2)

Review Details

Review Type

Select from the following values:

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

Empl Fdbck (employee feedback)

Initl Rtng (initial rating)

Intrm Rtng (interim rating)

Offcl Rtng (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.

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 that 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 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 that 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.

The system issues a warning if the figure that 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 the employee's total review rating points.

Final Review Band

If the rating scale type is Review Band, the system enters the default value of the Resulting Review Band. If you want to keep the value calculated by the employee's review points (Resulting Review Band) for reference yet give the employee a different overall result, you can change the value of this field. The Grade Advance Eligibility Process and various Japanese salary increase processes use the result in this Final Review Bank.

Total Review Points

The system calculates and enters the total review points from the Reviewers page if the rating scale type is Summation.

Total Review Amount, Total Review Percent or **Total Review Salary Points**	Depending on the resolution of 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 if the rating scale type is Summation.
Status	Select the status of this review. The system enters ***Proposed*** as the initial value. You must change the status to ***Approved*** before the salary change will load to the job data records for the employee.
Loaded to Job	The system selects **Loaded to Job** after you load changes to the Job record by running the Review Results to Job Data process.

Viewing Fields on the Employee Review Page

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

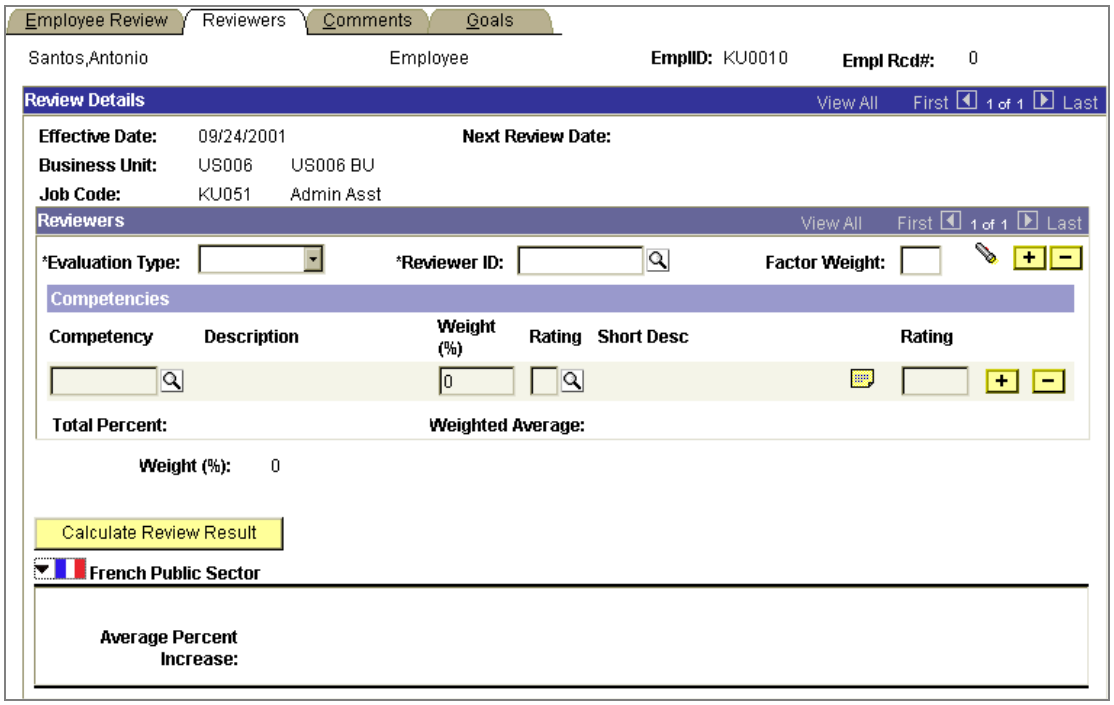
Average	*Summation*	*Review Band*
Rating Scale	Rating Scale	Rating Scale
Scale Type	Scale Type	Scale Type
Rating Model	Rating Model	Rating Model
Review Rating	Total Review Points	Resulting Review Band
	Total Review Amount	Final Review Band
	Total Review Salary Points	Status
	Total Review Percent	Loaded to Job
	Status	
	Loaded to Job	

See Also

Running the Review Results to Job Data Process

Recording Employee Reviews

Access the Employee Review - Reviewers page.



Employee Review - Reviewers page

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

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:

Average	*Summation*	*Review Band*
Competency	Competency	Competency

Average	*Summation*	*Review Band*
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 that you defined for the rating scale on the Rating Scale Table. Enter additional competencies that are specific to the employee.

Short Desc (short description) — 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 that 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.

Points — (For Summation and Review Band scales only.)

The system enters the points that 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 Reviewers 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.

Weighted Average — (For Average scale type only.)

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

Total Review Points — (For Summation and Review Band scales only.)

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

Review Totals

Weight (%) Displays the total percent of reviews completed. For example, suppose 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.)

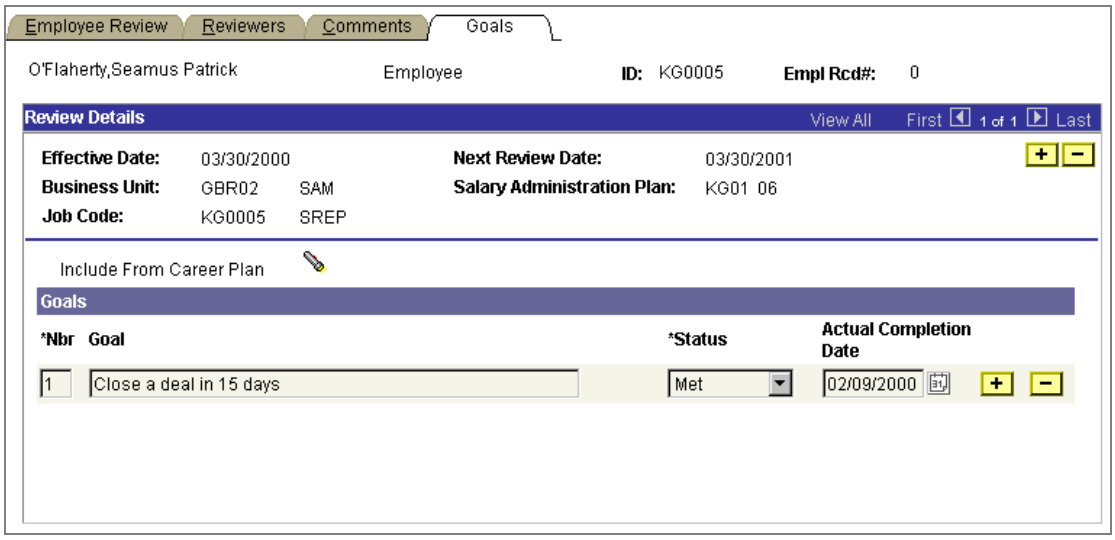
Displays the total review points for the reviews completed up to this point.

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

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

Reviewing Employee Goals

Access the Employee Review - Goals page.



Employee Review - Goals page

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.

Goals

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

Nbr (number) Enter the sequence number for the goals that you add.

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

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

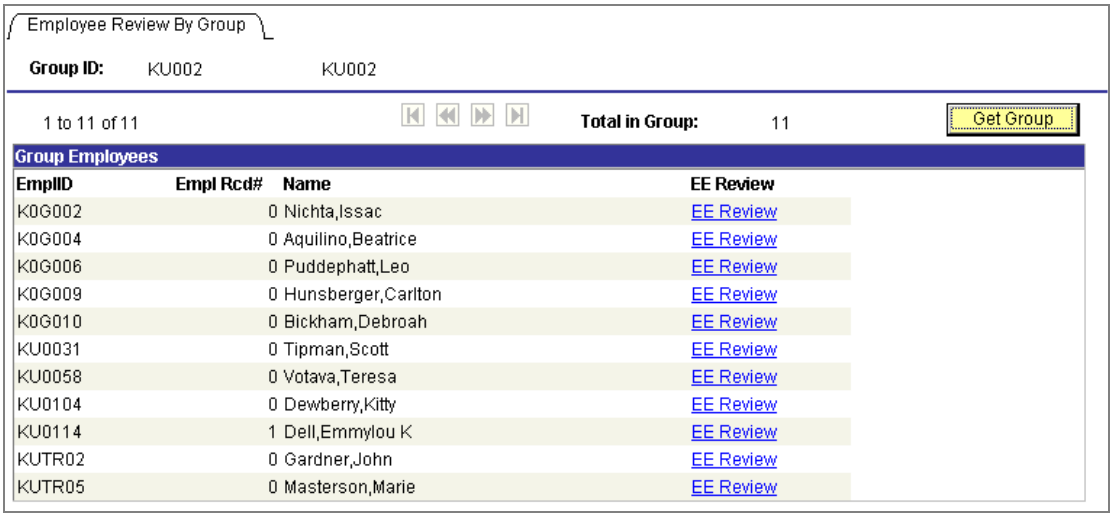
When you select a status of ***Met*** and the goal is also in the employee career plan, the system enters this date for short-term goals in the Actual Completion Date field in the Career Goals page. If you change this information a second time, for example, changing a met goal back to unmet, the system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

See Also

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

Viewing Employees in a Review Group

Access the Employee Review By Group page.



Employee Review By Group page

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

EE Review (employee review) — Click to open the employee's Employee Review page.

See Also

Pages Used to Conduct Employee Reviews

Viewing Employee Review Information

PeopleSoft Plan Salaries provides four inquiry pages for reviewing employee review information. 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.

In this section, we discuss how to:

- Identify employees with no current reviews.
- View employee review result distributions.
- View group review result distributions.
- Track an employee's reviews over time.

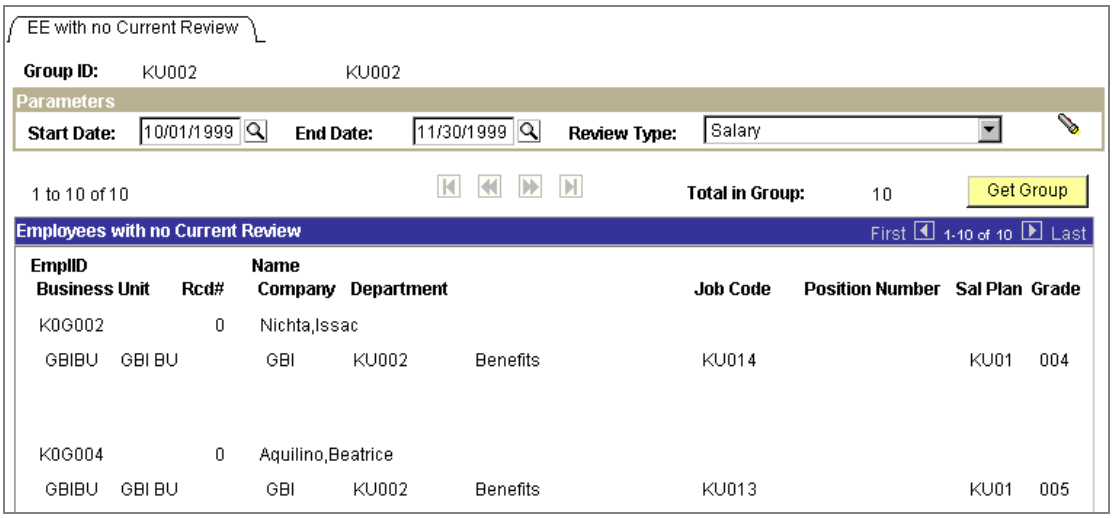
Pages Used to View Employee Review Information

Page Name	*Object Name*	*Navigation*	*Usage*
EE With no Current Review Inquiry	EE_NO_CURR_RVW_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, EE with no Current Review, EE with no Current Review	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.
EE Review Result Distribution Inquiry	EE_REVW_RESLT_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, EE Review Result Distribution, EE Review Result Distribution	View each employee's review result and the group's desired result distribution, the actual distribution, and the variance.

Page Name	Object Name	Navigation	Usage
Review Result Distribution Inquiry	REVW_RES_DIST_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, Review Result Distribution, Review Result Distribution	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 view the budgeted amount, actual amount, and the variance.
Review History	REVIEW_HISTORY_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, Review History, Review History	Track an employee's reviews over time.

Identifying Employees With No Current Review

Access the EE with no Current Review Inquiry page.



EE with no Current Review Inquiry page

Parameters



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

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

Employees With No Current Review

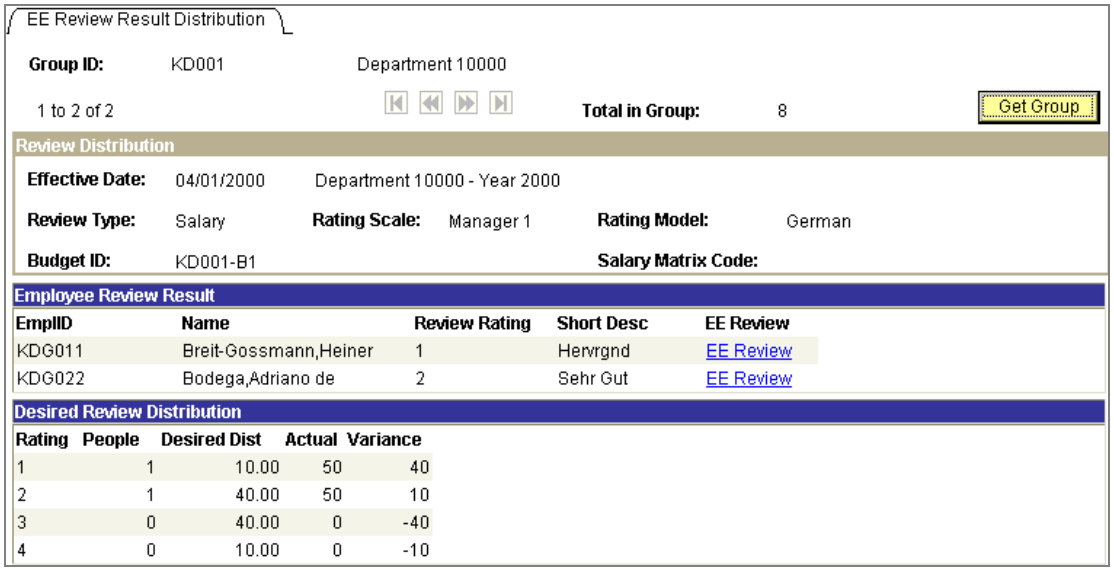
The system displays the following data from the employee's Job record: **EmplID, Name, Business Unit, Rcd#** (record number), **Company, Department, Job Code, Position Number, Salary Plan,** and **Grade.**

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Viewing Employee Review Result Distributions

Access the EE Review Result Distribution Inquiry page.



EE Review Result Distribution Inquiry page

Note. Column order for grids may vary by implementation.

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

Review Distribution

Effective Date Displays the current review results as of the current date for all employees in the group.

Rating Scale Displays the rating scale associated with this group, effective date, and review type.

Budget ID and **Salary Matrix Code** — If you specified a budget ID and a Salary Matrix when you defined the review result distribution, the system displays both of these.

Employee Review Result

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

Review Rating — (Average scale type.)

The system displays the employee's review rating.

Final Review Band — (Review Band scale type.)

Displays the employee's final review band. 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.)

Displays the employee's total salary points resulting from the review.

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

Displays the employee's total percent resulting from the review.

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

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.

Group — This field is hidden if the rating scale type is Average.

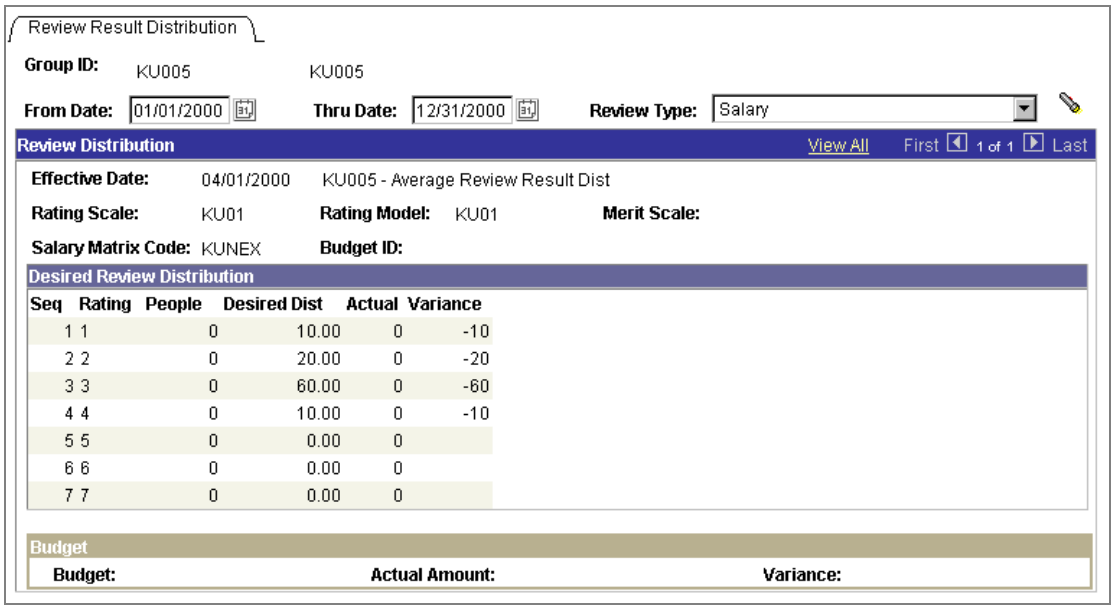
From and **To** — Displays the beginning and final values in the point range for this group.

These fields are hidden if the rating scale type is Average.

People	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).
Desired Dist (desired distribution)	Displays the percent distribution that you defined for this level of performance. If you did not define a desired distribution for the group, the system enters 0.
Actual	Displays the actual review result distribution.
Variance	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.

Viewing Group Review Result Distributions

Access the Review Result Distribution Inquiry page.



Review Result Distribution Inquiry page

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

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 the group that you want to view on this page.
Rating Scale, Rating Model, Merit Scale, Salary Matrix Code, and **Budget ID**	Displays the values 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.

Budget

Budget	Displays the amount that you budgeted for salary increases.
Actual Amount	Displays the actual amount of the salary increases for this group and this review.
Variance	Displays the variance between the budgeted and actual amounts.

See Also

Viewing Employee Review Result Distributions

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 PeopleSoft Database Agent process that selects all employees who meet both of the following conditions:

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

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

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.

Prior to using this page, 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 *Approved*.

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 a PeopleSoft Application Engine and a Database Engine process. These two processes must run in the correct order.

To Run the Review Results to Job Process:

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

See Also

PeopleTools PeopleBook: Process Scheduler

Pages Used to Process Employee Reviews

Page Name	*Object Name*	*Navigation*	*Usage*
Late Reviews	PRCSRUNCNTL	Administer Workforce, Plan Salaries, Process, Late Reviews	Run the Late Reviews Process.
Review Results to Job Data	RUNCTL_REVTOJOB	Administer Workforce, Plan Salaries (GBL), Process, Review Results to Job Data, Review Results to Job Data	Update job data records for employees reviewed by a Summation type rating scale.

Reporting on Employee Reviews

In this section, we discuss how to:

- Define employee review audits.
- View employee review result distribution.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Plan Salaries Reports

Defining Employee Review Audit

The Employee Review Audit report lists employees in the group both who have and have not completed the review process. 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.

Use this report as a reminder to schedule interviews.

Viewing Employee Review Result Distribution

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.

CHAPTER 6

Budgeting and Planning Salary Increases

This chapter discusses how to:

- Set up controls for salary increase budgets.
- Budget group increases.
- Plan group salary increases.
- View budget comparisons.
- Load salary changes to compensation records.

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 sections in this chapter explain these steps in further detail.

To budget and plan salary increases:

1. Create a salary increase group using group build pages.
2. Establish default salary plan controls.
3. Set up group-level controls for specific plan periods.
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.
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.

11. Populate employee records with planned, approved increases.

See Also

Setting Up Controls for Salary Increase Budgets and Plans

Budgeting Group Increases

Planning Group Salary Increases

Loading Salary Changes to Compensation Records

Common Elements Used in This Chapter

Salary Increase Budget	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.
Salary Increase Plan	A plan for manually increasing the salaries of individual employees in a group.
Requested Budget	The salary increase budget as it is defined and submitted for approval on the Group Increase Budget pages.
Current Budget	The system uses the current salary increase budget for variance calculations in salary planning by group.

Setting Up Controls for Salary Increase Budgets and Plans

In this section, we discuss setting up controls for salary increase budgets and plans and how to:

- Define ID codes for salary increase plan default values.
- Define salary plan default values.
- Establish default control values for salary increase budgets and plans.
- (MEX) Defining the increase matrix method.

Understanding 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. Set up sets of default control data that you can modify at the group level.

Here's how to set up default controls for salary increase budgets and plans:

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

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

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

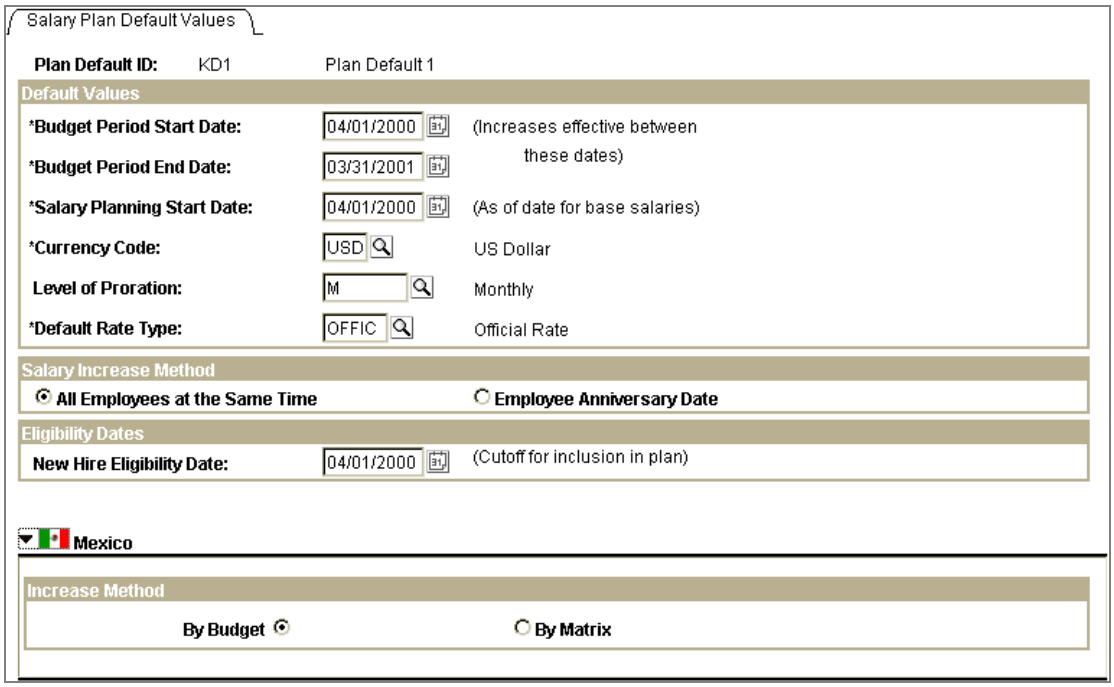
The values that you save on this page are the default control values that the system enters on the Group Increase Budget page and Salary Planning by Group page when you establish salary increase budgets and plans for this group.

Pages Used to Set Up Controls for Salary Increase Budgets and Plans

Page Name	*Object Name*	*Navigation*	*Usage*
Plan Defaults Table	CONTROL_TBL	Administer Workforce, Plan Salaries (GBL), Setup, Plan Default Table, Plan Defaults Table	Define an ID code that you will use as a key to a set of salary plan increase default values that you will set up on the Salary Plan Default Values page.
Salary Plan Default Values	SAL_PLAN_CONTROL	Administer Workforce, Plan Salaries (GBL), Use, Salary Plan Default Values, Salary Plan Default Values	Define default budget and salary increase plan control dates, currency defaults, the salary increase method, eligibility dates, and salary increase effective date.
Sal Plan Group Default Values	SAL_PLAN_CNTRL_GRP	Administer Workforce, Plan Salaries (GBL), Use, Sal Plan Group Default Values, Group Default Values	Establish default control values for salary increase budgets and plans that you set up for a particular group ID. The system populates this page with the default values you defined on the Salary Plan Default Values page. You can change the default values for the group.

Defining Salary Plan Default Values

Access the Salary Plan Default Values page.



Salary Plan Default Values page

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

Default Values

Budget Period Start Date and **Budget Period End Date**

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

Salary Planning Start Date

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

Currency Code

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

Level of Proration

Displays budget and salary plan calculations in the frequency that you select here. The available values are from the Frequency Table.

Default Rate Type

Select the rate type that you want the system to enter as the default for your salary increase plans. Valid values are the exchange rate types that you previously established 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 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 that you define for the increase on the Budget Requested page.

Employee Anniversary Date — Select if you want salary increases under your salary plans to be implemented on the 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. The level of proration must be Annual. Define only one increase in the budget. Run the Create/Refresh Anniversary Dates process before loading salary increases to the Job record.

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.

(MEX) Mexico

Increase Method — Indicate how you want the system to calculate salary increases:

By Budget : the system takes the budget percentage for all employees when calculating the salary increase.

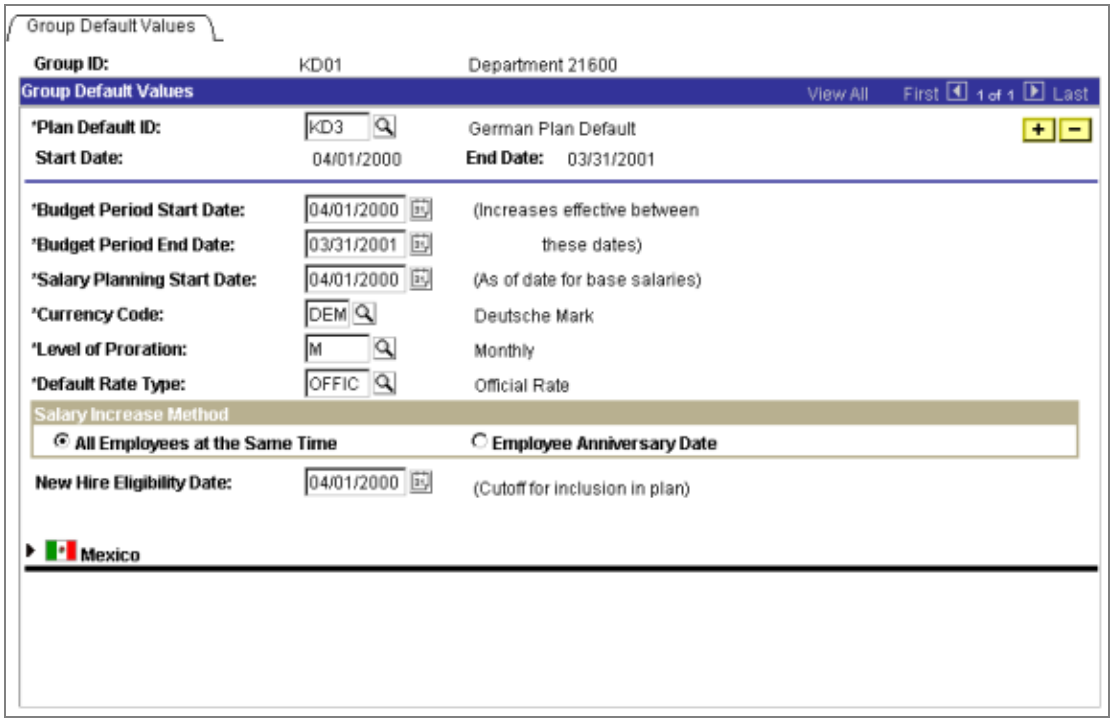
By Matrix: the system looks at the employee's performance and position in the salary range to insert a percentage increase value.

See Also

(MEX) Defining the Increase Matrix Method

Establishing Default Control Values for Salary Increase Budgets and Plans

Access the Sal Plan Group Default Values page.



Sal Plan Group Default Values page

Note. 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.

Group Default Values

Plan Default ID — Use this field to select the values you want the system to enter on this page as the default control values for this group. Set up the default values for Plan Default IDs on the Salary Plan Default Values page.

Start Date and **End Date** — Displays the start and end dates of the budget period that you entered for this Plan Default ID on the Salary Plan Default Values page.

Administering Plans by Employee Anniversary Date

If you select **Employee Anniversary Date,** use the following guidelines when setting up the group increase budget:

- The budget period must be an entire year. For example, suppose the budget start date is 4/1/2000, then the budget period end date must be 3/31/2001.
- The level of proration must be Annual.
- 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.

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

See Also

Defining Salary Plan Default Values

(MEX) Defining the Increase Matrix Method

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

- Standard budget raise method
- Salary increase matrix method

With the standard method, you can take the budgeted percentage and insert it into the employee's salary plan. With the salary increase matrix method, you can take the percentage from the salary increase matrix.

Once you select the increase method on the Salary Plan Default Values page and the Salary Plan Group Default Values page, you need to calculate the salary increase for the employee.

To calculate the salary increase if you select the By Matrix increase method:

1. Determine the result of the last evaluation before the increase effective date.
2. Determine the employee compensation quartile.
3. Determine the increase percentage.
4. Update employee data with the new raise percentage.

Here is an example of how you can calculate the increase matrix method.

Step 1 - Determine the Result of the Last Evaluation

Go to the Employee Review page to see the results. The **Review Rating** field indicates the result of the last evaluation. In our example, the employee received a review rating of ***3*** (***Average)*** in his last evaluation.

Verify the effective date of the last evaluation on the Propose Raises page. In our example, the last effective date entered, indicated on the **Start Date** field, is 04/01/2000.

Note. Also enter the effective date for the new evaluation on the Propose Raises page.

See Also

Integration of Employee Reviews and Salary Increase Planning

Step 2- Determine the Employee Compensation Quartile

Determine the employee's compensation quartile in the salary matrix on the Salary Plan page. Enter the salary administration plan, grade, and step for the employee. The matrix to which the employee belongs to appears on this page.

On the Compensation page, verify the hourly, daily, monthly and annual pay rates for the employee.

In our example, when we look at the Compensation page, we see that the monthly salary for this employee is $2166.67.

Once we've determined the employee's monthly salary, we look at the quartile.

On the Salary Grade Table page, you'll see the minimum, midpoint, and maximum salary ranges for the employee's salary grade.

Determine the employee's quartile in the following way:

- Quartile = Min. + (Quartile No. * (Max - Min/4)

The quartiles for the salary ranges are **Below, Quartile 1, Quartile 2, Quartile 3,** and **Quartile 4.**

Frequency	*Below*	*Quartile 1*	*Quartile 2*	*Quartile 3*	*Quartile 4*
Annual	$39,600.00	$45,227.50	$50,855.00	$56,482.50	$62,110.00
Monthly	$3,300.00	$3,768.96	$4,237.92	$4,706.87	$5,175.83
Daily	$152.31	$173.96	$195.60	$217.25	$238.89
Hourly	$19.04	$21.75	$24.45	$27.16	$29.86

Since our employee's monthly salary is $2166.67, we determine that this employee is in the **Below** range.

Note. The data used on the quartile formula is taken from the Salary Grade table.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce , "Hiring Your Workforce," Entering Employee Salary Plans and Entering Worker Compensation Information

"Setting Up Salary Plans, Grades, and Steps"

Step 3 - Determine the Increase Percentage

Look at the salary increase matrix table on the Salary Increase Matrix Table page to determine the salary increase percentage. In our example, we have a range, instead of an amount, so we need to calculate the average to find the increase percentage.

The information needed to determine the increase percentage for this employee is as follows:

- Review result = 3 (Average)
- Quartile = Below minimum
- Matrix = KUEX

Go to the Salary Increase Matrix Table page. There, in the Salary Increase Matrix group box, you'll see the minimum and maximum ranges for the increase percentages for each quartile.

For the Below Minimum range, you'll see that the minimum percentage is 5.0 and the maximum percentage is 9.0.

We calculate the increase percentage as follows:

Increase percentage = (9.0 + 5.0)/2 = 7.0

So, this employee will receive a salary increase percentage of 7 percent.

Step 4 - Update Employee Data with the New Raise Percentage

Go to the Salary Planning by Group page to update the new salary increase. There, on the Changes tab, enter the rate code that corresponds to the increase percentage.

Once you've entered the new raise percentage, the employee's new salary, change amount, and change percent appears.

See Also

"Setting Up Salary Plans Grades and Steps," Defining a Salary Increase Matrix

Budgeting Group Increases

In this section, we discuss salary increase budgeting procedures and how to:

- Establish group increase budgets.
- Set up a budget description.
- Define budget requests.
- Enter and calculate budget components.
- Calculate the budget.

Understanding Salary Increase Budgeting Procedures

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

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

  You want to use the batch process if your group is 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 - Budget Requested page or the Budget Comparison - Comparison Inquiry page.

Here's how to establish a salary increase budget for a group:

1. Create a group using group build pages.

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

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

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

4. Define the effective date, sequence, action, and action reason, for the budget increase on the 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 or action reason combinations that take effect on different dates within the same budget. However, do not do this if the increases are administered by Anniversary Date.

5. 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 Group Increase Budget - Budget Components page or the Group Increase Budget - 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 Group Increase Budget - Budget Requested page.

7. Submit the budget for approval by clicking the Request Approval button on the Group Increase Budget - 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.

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.

11. Use the approved or unapproved budget as the basis for creating a salary increase plan.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Groups"

Setting Up Controls for Salary Increase Budgets and Plans

Planning Group Salary Increases

Common Elements Used in This Section

Budget Period and **Level of Proration**	Displays the control dates and the level of proration that you set up for the group in the Sal Plan Group Default Values page.
Total Count	Displays the total count of employees in the group as of the salary plan start date.
FTE (full time equivalency)	Displays the FTE for the group as of the salary plan start date.

Total Annual Salaries

Displays the total salaries of group members as of the salary plan start date in the currency that 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 field is the total sum of salaries for 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 that you defined on the Sal Plan Group Default Values page.

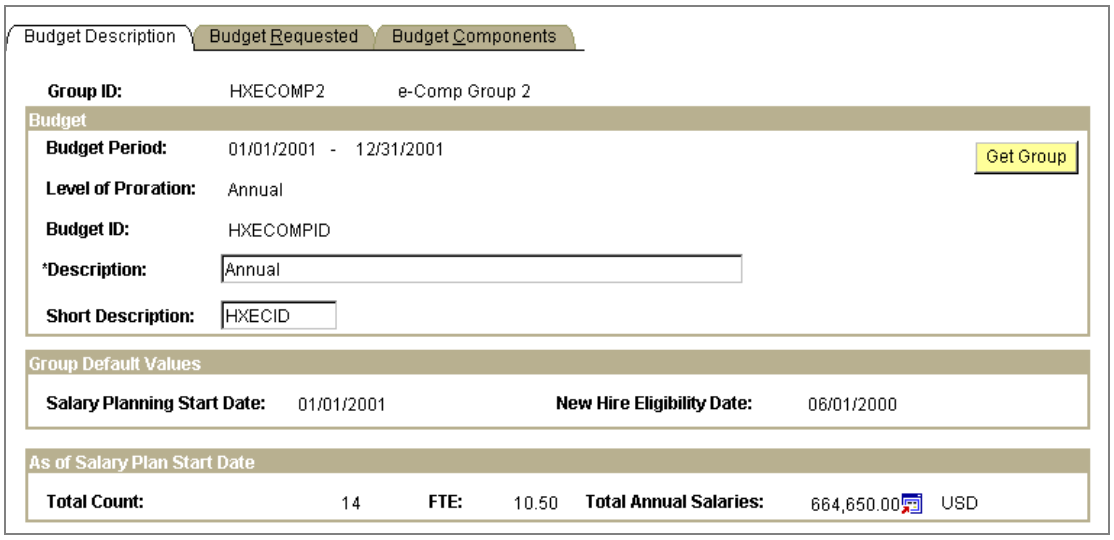
Pages Used to Budget Group Increases

Page Name	*Object Name*	*Navigation*	*Usage*
Group Increase Budget – Budget Description	GROUP_INCR_BUDGET1	Administer Workforce, Plan Salaries (GBL), Use, Group Increase Budget, Budget Description	Assign a Budget ID and describe a salary increase budget for a group of employees.
Group Increase Budget – Budget Requested	GROUP_INCR_BUDGET2	Administer Workforce, Plan Salaries (GBL), Use, Group Increase Budget, Budget Requested	Define the action and action reason for the budget and to view requested and current budget totals. Use this page to submit a budget for approval, to modify and approve the budget, and to approve the salary plan associated with the budget.

Page Name	*Object Name*	*Navigation*	*Usage*
Group Increase Budget – Budget Components	GROUP_INCR_BUDGET3	Administer Workforce, Plan Salaries (GBL), Use, Group Increase Budget, Budget Components	Enter and calculate increases for group members by base pay rate codes. The system calculates the totals for the group and displays them on the Group Increase Budget – Budget Requested page.
Budget Calculation	RUNCTL_CALCBUDGET	Administer Workforce, Plan Salaries (GBL), Process, Budget Calculation, Budget Calculation	Run the Budget Calculation application engine process, which calculates the total budget amount and percent for the rate code increases that you enter on the Group Increase Budget - Budget Components page. It enters the totals in the Requested and Current data rows on the Group Increase Budget - Budget Requested page. You can calculate the budget using online processing if the group is small. For large groups, use this application engine process. Define a group increase budget before using this page.

Setting Up a Budget Description

Access the Group Increase Budget - Budget Description page.



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. You can compare these budgets in the Budget Comparison Inquiry pages.

The group default values can be set up on the Sal Plan Group Default Values page.

Retrieving Group Information

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

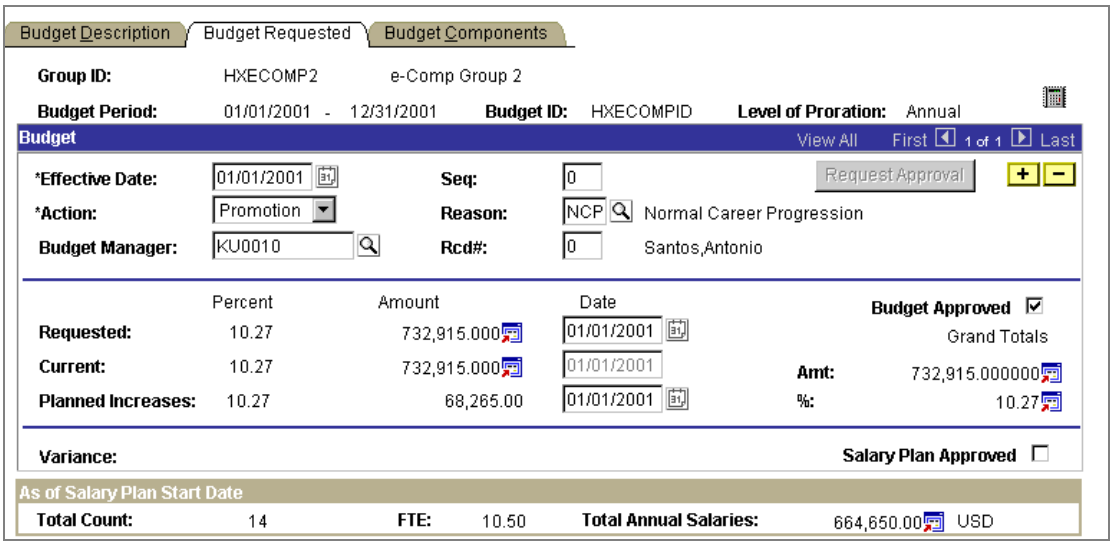
Group Default Values

Salary Planning Start Date Displays the Salary Planning Start Date that you set up for the group in the Sal Pan Group Default Values page.

New Hire Eligibility Date If you're administering salaries by the All Employees at the Same Time method, Displays the new hire eligibility date that you set up for the group in the Sal Pan Group Default Values page.

Defining Budget Requests

Access the Group Increase Budget - Budget Requested page.



Group Increase Budget - Budget Requested page

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 and action reason combinations that take effect on different dates within the same budget.

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

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;*** therefore, 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 from the following valid values associated with this budget: ***Demotion, Pay Rt Chg*** (pay rate change), ***Posn Chg*** (position change), and ***Promotion.***

Reason

Select from the valid list of action reason code values established on the Action Reason Code Table.

Budget Manager

The default value is the Manager ID defined for the group when the group was defined. You can override this ID if necessary. When you enter the manager ID, the system automatically updates the **Rcd#**(record number) field with the manager's 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 Group Increase Budget – Budget Components page, click the **Calculate** button to calculate the budget and populate the **Request Approval, 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 Group Increase Budget - Budget Components page.
- Budget period parameters that you define for the budget.

Note. Only the budget manager is allowed to unapprove the budget. If you modify a budget that has already been approved, you will have to recalculate the budget and then request a new approval. You cannot save the page unless a recalculation is done and a new approval is requested. It is not possible to modify a budget that has salary increases already loaded to JOB since this changes the status in Salary Planning by Group to *Processed*. If a budget is modified, the status will automatically be set to *Proposed*, even if the status was previously *Approved*.

Request Approval

Click this button to send a workflow notifying the approval manager to review the budget. Workflow must be enabled.

Percent

Displays the total percent change in salaries.

Requested Percent = (Requested Amount - Total Annual Salaries prorated to level of proration) / Total Annual Salaries prorated to level of proration * 100

Current Percent = (Current Amount - Total Annual Salaries prorated to level of proration) / Total Annual Salaries prorated to level of proration * 100

Planned Increase Percent = Planned Increase Amount / Total Annual Salaries prorated to level of proration * 100

Variance Percent = Variance Amount / Total Annual Salaries prorated to level of proration * 100

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

Amount

Displays the change in total salaries.

Note. The following calculations include all base pay rate codes in each Job compensation package as well as any new percentage or salary points calculations resulting from the planned increase.

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

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

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

Variance Amount = Current Amount - Requested Amount

Date

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

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

Requested

This information represents the amount being requested for salary increases.

Current

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

Planned Increases

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

Budget Approved

The approval manager first enters the date in the **Current** budget row and then selects the **Budget Approved** check box when satisfied with all of the budget figures.

The system selects this check box if you approve a budget on the Budget Comparison - Comparison Inquiry page.

Only one approved budget can exist at one time for a single group and budget period start date.

Only the budget manager can unapprove a budget by clearing this check box. Then the Requested Budget and Current Budget grids on the Budget Components page will become available for edit.

Grand Totals

Amt (amount)

The system enters the total increases according to the current budget, calculated and displayed at the level of proration defined for the budget.

% (percent)

The system enters the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the current budget.

Variance

After you create a salary increase plan associated with this budget, displays the variance between the Requested Amount and Current Amount.

If the variance displays as a positive amount, the salary plan exceeds the budgeted amount. If the variance displays as a negative amount, the planned salaries fall short of the budgeted amount.

Salary Plan Approved

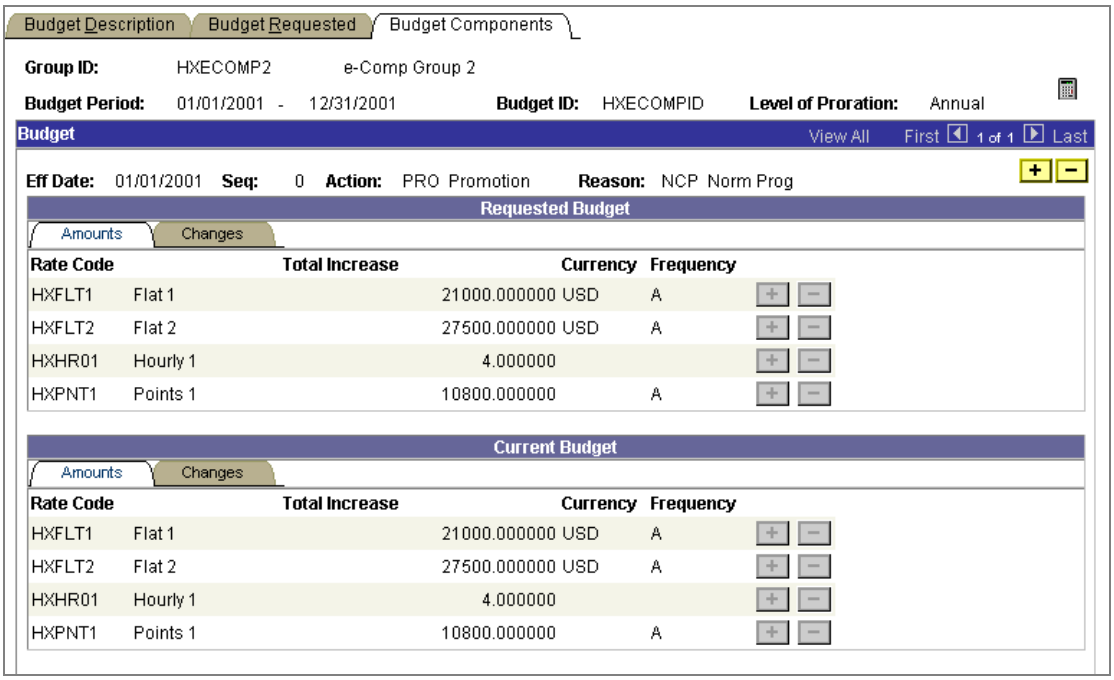
The approval manager selects this check box to approve the plan. It must be selected to load the salary increases to Job Data.

See Also

Approving a Budget

Entering and Calculating Budget Components

Access the Group Increase Budget - Budget Components page.



Group Increase Budget - Budget Components page

Common Page Information

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

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

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



After entering or adjusting 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 Group Increase Budget - Budget Requested page.

If you have a large group, use the Budget Calculation application engine process instead of this button.

Amounts Tab

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

Note. If you modify a budget that has already been approved, you need to recalculate the budget. You can't save the page unless a recalculation is done. It isn't possible to modify a budget that has salary increases already loaded to JOB since this changes the status in Salary Planning by Group to Processed. If a budget is modified, the status will automatically be set to Proposed, even if the status was previously Approved.

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

Total Increase — 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, suppose there are five 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 and **Frequency** — Displays the currency and frequency that you defined for the rate code in the Comp Rate Code Table.

Changes Tab

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 value in **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 value in **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 value in **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 value in **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 existing rate code percent.

Current Budget Amounts and Changes

As you enter the Requested Budget details, the system copies them into the Current Budget grid. The approval manager can adjust the budget in the Current Budget grid. When you click 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 Group Increase Budget - Budget Requested page.

When the budget is approved, this grid isn't accessible. You aren't able to insert or delete rows and you can't modify any value in the grid.

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

See Also

Entering and Calculating Budget Components

Viewing Budget Comparisons

In this section, we discuss how to use the Budget Comparison Inquiry pages to:

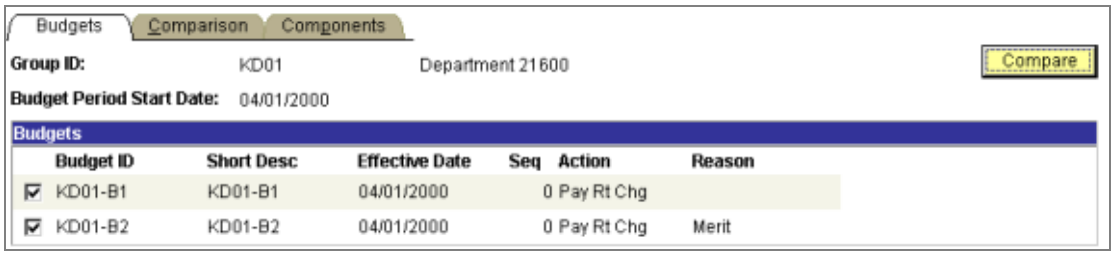
- View proposed budgets.
- View budget variances.
- View budget details.
- Approve a budget.

Pages Used to View Budget Comparisons

Page Name	Object Name	Navigation	Usage
Budget Comparison Budgets - Budgets	BUDGET_COMPAR3_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, Budget Comparison, Budgets	View a list of proposed budgets for the specified group ID and budget period start date. Displays the description of each budget along with its effective date and sequence.
Budget Comparison Budgets - Comparison	BUDGET_COMPAR1_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, Budget Comparison, Comparison	View the requested amount and requested percent variance between one budget and all others that you selected on the Budgets Inquiry page.
Budget Comparison Budgets - Components	BUDGET_COMPAR2_INQ	Administer Workforce, Plan Salaries (GBL), Inquire, Budget Comparison, Components	View budget details by rate code associated with the budget selected in the Variance check box on the Budget Comparison Budgets - Comparison Inquiry page.

Viewing Proposed Budgets

Access the Budget Comparison - Budgets page.



Budget Comparison - Budgets page

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

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

Compare Click this button to load the selected budgets into the Comparison Inquiry page.

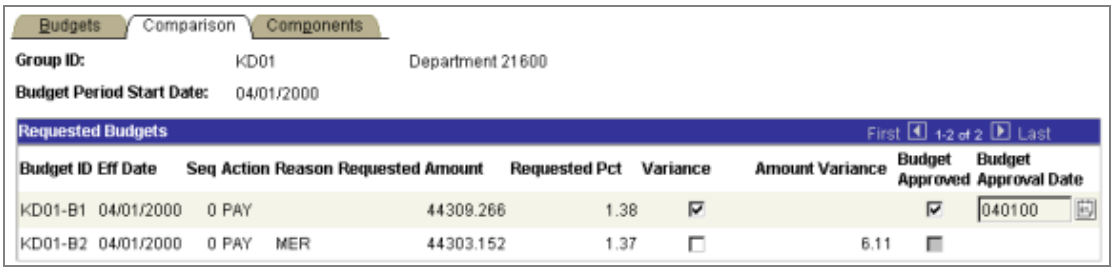
Budget ID Select the check box that precedes the budget ID for each budget that you want to compare with other budgets on the next page in the component.

See Also

Budgeting Group Increases

Viewing Budget Variances

Access the Budget Comparison - Comparison page.



Budget Comparison - Comparison page

Displays the budgets that you selected on the Budget Comparison Budgets - Budgets Inquiry page.

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

Amount Variance Displays the amount that each budget varies from the budget that you selected in the **Variance** field.

Budget Approved Select to approve a budget on this page. You must also enter a date in the **Budget Approval Date** field.

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

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

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

See Also

Approving a Budget

Approving a Budget

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

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

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

- Salary Plan Approved must be selected on the Group Increase Budget –Budget Requested page.
- The individual employee increases must be marked Approved on the Summarize and Approve Raises page.

See Also

Understanding Salary Increase Budgeting Procedures

Planning Group Salary Increases

In this section, we discuss salary increase planning and how to:

- Integrate employee reviews and salary increase planning.
- Calculate salary increases based on the budget.
- Run salary plan calculations.
- Propose and approve raises.
- Apply group increases.
- View the salary plan summary.
- View budget information.

Understanding Salary Increase Planning

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.

Here's how you use the Salary Planning by Groups pages to create salary increase plans:

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

   For small groups, 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, click the Refresh Budget button on the Summarize and Approve Raises page to update the current budget on the Group Increase Budget - Budget Requested page.
4. View summary information on the Summarize and Approve Raises page.
5. Approve employee raises on the Summarize and Approve Raises page.

   Approve all raises by clicking the Approve All button. Alternatively, you can approve or deny raises by changing the status of each employee individually.
6. Approve the Salary Plan on the Group Increase Budget - Budget Requested page.

See Also

Understanding Salary Increase Budgeting Procedures

Integration of Employee Reviews and Salary Increase Planning

If you use salary increase guideline matrices in salary planning, the system calculates whether the new salary 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.
- Online processing on the Propose Raises page.

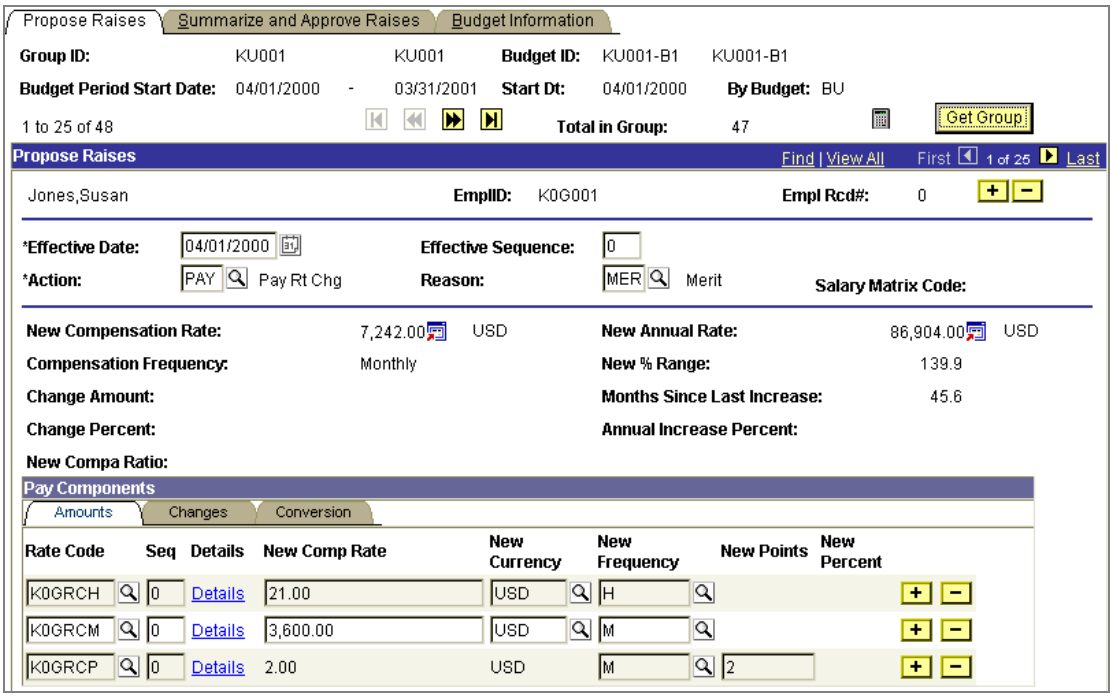
Pages Used to Plan Group Salary Increases

Page Name	*Object Name*	*Navigation*	*Usage*
Salary Plan Calculation	RUNCTL_SALPLNGRP	Administer Workforce, Plan Salaries (GBL), Process, Salary Plan Calculation, Salary Plan Calculation	Run the Salary Plan Calculation application engine process. Before using this page, enter employee raises in the Propose Raises page. This process is recommended for calculating large groups.
Propose Raises	SALARY_PLAN_GRP	Administer Workforce, Plan Salaries (GBL), Use, Salary Planning by Group, Propose Raises	Apply the group increase budget to the pay components of the employees in the group. You can manually enter pay components and modify salary increases for employees in the group.
Summarize and Approve Raises	SAL_PLAN_GRP_APPR	Administer Workforce, Plan Salaries (GBL), Use, Salary Planning by Group, Summarize and Approve Raises	Show the totals by effective date, effective sequence, action, and action reason as well as the overall grand totals of your planned salary increases.

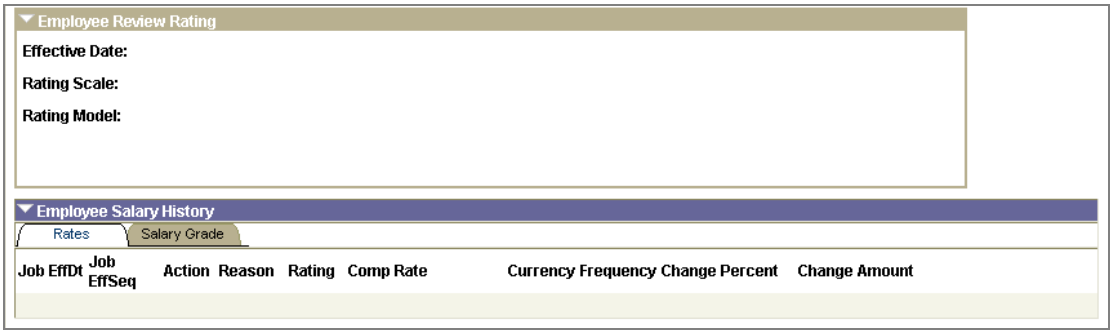
Page Name	Object Name	Navigation	Usage
Budget Information	SAL_PLAN_GRP_BDGT	Administer Workforce, Plan Salaries (GBL), Use, Salary Planning by Group, Budget Information	Displays budget information.

Applying Group Increases

Access the Propose Raises page.



Propose Raises page (1 of 2)



Propose Raises page (2 of 2)

You must create a group increase budget for the employee's group before using this page.

Note. This process is recommended for calculating small groups.

Identifying the Budget

Start Dt (start date)

Displays the salary planning start date that you associated with this budget ID on the Group Increase Budget – Budget Description page.

Request Load

If you have workflow enabled, click this button after you have made all manual changes on this page and are ready to approve the salary plan and load the salary increases to the 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.

This button is hidden if you do not enable workflow.

Get Group

Click to load the group into the page and to make sure the employees displayed in the page are currently eligible group members.

The system also updates the Total Annual Salaries on the Summarize and Approve Raises page when you click this button, because a change in the group affects the group's totals.

Note. When you refresh the group by clicking the **Get Group** button, the system does not calculate the default proposed budgeted increases for employees added to the group. Click the **Increase Calculation** button to populate the page with the default budgeted increases for all current group members.

The system loads the page in chunks of group members. Use the **Previous** and **Next** buttons to select the data of the employee you want to view.

Total in Group

Displays the total number of employees in the group.



Click the **Increase Calculation** button to calculate and load the default budgeted increases for group members. Do not click this button if you use the Salary Plan Calculation process before entering this page.

Note. Don't 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 that 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 originally

budgeted, add these manually in the Pay Components grid on this page.

Effective Sequence

Select the sequence number of the action that you defined for the budget increase on the Group Increase Budget – Budget Requested page.

This sequence number determines the order in which the salary increases are compounded if there is more than one action and reason in the budget for the same effective date. For example, suppose the first action and reason results in an increased amount of compensation for a rate code from 50,000 USD to 53,000 USD. The second action and reason results in an additional 3 percent for the same rate code. Because of the sequence, the system calculates and adds 3 percent of 53,000 USD.

Action and **Reason**

Select the action and reason that you defined for the budget increase on the Group Increase Budget - Budget Requested page.

New Compensation Rate

Displays the employee's new compensation rate as of the effective date, sequence, action, and reason. This new compensation rate is displayed in the **Job Curr/Freq** field..

Compensation Frequency

Displays the currency code and frequency specified in the employee's Job record. This is the currency and frequency in which the calculations appear.

Change Amount

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.

Change Percent

Displays the employee's total percent increase by applying the effective date, sequence, action, and action reason to all of the budget increase components that are in the employee's compensation package.

New Compa Ratio

Displays the employee's new compa-ratio. The system calculates the compa-ratio figure from the data in the Salary Grade Table.

New Annual Rate

The system calculates and displays the 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.

New % Range (new percent in range)

Displays the employee's new percent in range. The system calculates the percent in range figure from the data in the Salary Grade Table.

Months Since Last Increase	Displays the number of months since the employee's last increase.
Annual Increase Percent	Displays the employee's annualized change in terms of percent.
Job Ratio	Displays the Job Ratio of the job code assigned to this employee. The Job Ratio is derived from the values in the Job Ratio group box on the Job Code – Default Compensation page and the employee's comprate.

Pay Components

The pay components listed in the grid are those defined on the Job Data – Compensation page. The grid is populated when you enter the page. When you click Increase Calculation, the system applies the increases to the rate code. To recalculate and refresh the data on the Group Increase Budget - 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.

Note. Don't 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.

Note. If a raise status is *Processed*, then this grid isn't accessible.

Amounts Tab

Rate Code	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	Displays the sequence number of the rate code in the compensation package.
New Comp Rate	Displays the compensation rate for the rate code after applying the new amount, percent, or points.
New Currency	If you want the rate code to have a different currency, you can select that currency here. For points-type rate codes, this field is not available for change.
New Frequency	If you want the rate code to have a different frequency, 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, displays the new point value here.
New Percent	If you proposed a different percent value for the rate code, 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

Rate Code	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	Displays the sequence number of the rate code in the compensation package.
Change Amount	Displays the proposed change in the amount of compensation for the rate code, in the currency and frequency of the rate code.
Change Points	If the rate code type is Points, Displays the proposed change in the points for the rate code. You can enter a value for a new data row if the rate code type is Points.
Change Percent	Displays the proposed percent of change in the compensation for the rate code.

Conversion Tab

Convert Comprt (converted compensation rate)	Displays the compensation rate for the rate code converted to the employee's compensation frequency and currency.
Default Without Override	Used for multiple components of pay.
Apply FTE	The system indicates whether Apply FTE is selected for this rate code in the Comp Rate Code Table.

Employee Review Rating

In this section, view the results of the employee's review. The fields in this section are the same as those found on the Employee Review page.

Employee Salary History - Rates Tab

In this section, 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) and **Job EffSeq** (job effective sequence)	The effective date and effective sequence of the change in the employee's compensation.

Action and **Reason**	The action and 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 the job effective date, job effective sequence, action, and reason.
Currency and **Frequency**	The currency and frequency of the employee's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
Change Percent and **Change Amount**	The percent of change and amount of change in the employee's compensation for the job effective date, job effective sequence, action, and reason.

Employee Salary History - Salary Grade Tab

Job EffDt (job effective date) and **Job EffSeq** (job effective sequence)	The effective date and effective sequence of the change in the employee's compensation.
Salary SetID	The setID associated with the employee's salary.
Sal Plan (salary plan) and **Grade**	The salary plan and salary grade associated with the employee's job row.
Comp-Ratio (compa-ratio)	The employee's compa-ratio for this job row, calculated from data in the Salary Grade Table.
Month Last Increase	The number of months since the previous salary increase.

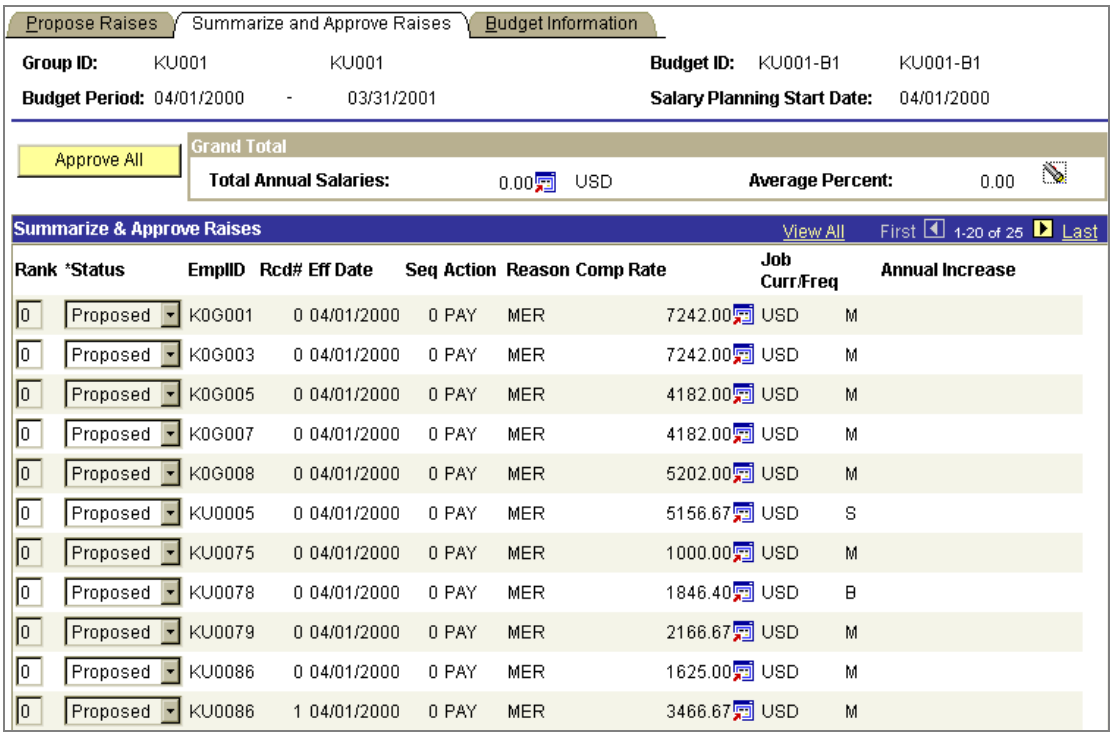
See Also

Approving a Budget

"Reviewing Employee Performance," Conducting Employee Reviews

Viewing the Salary Plan Summary

Access the Summarize and Approve Raises page.



Summarize and Approve Raises page

Budget Period Displays the start and end dates that you defined for this budget ID.

Salary Planning Start Date Displays the salary planning start date that you defined for this budget ID.

Approve All Once you have finalized the plan, click 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 Salary Changes process.

Grand Total

Total Annual Salaries Displays the total of all of the salaries in the salary plan.

Average Percent Displays the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the plan.

 Click the **Refresh** button after you make modifications to the salary increase plan. The system updates the Grand Totals.

Summarize & Approve Raises

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. Use this field for force ranking, such as listing employees from the highest increase to the lowest.

Status Select from the following valid values for this field: ***Approved, Ineligible, No Incr*** (no increase), ***Processed,*** and ***Proposed.*** The default is ***Proposed.***

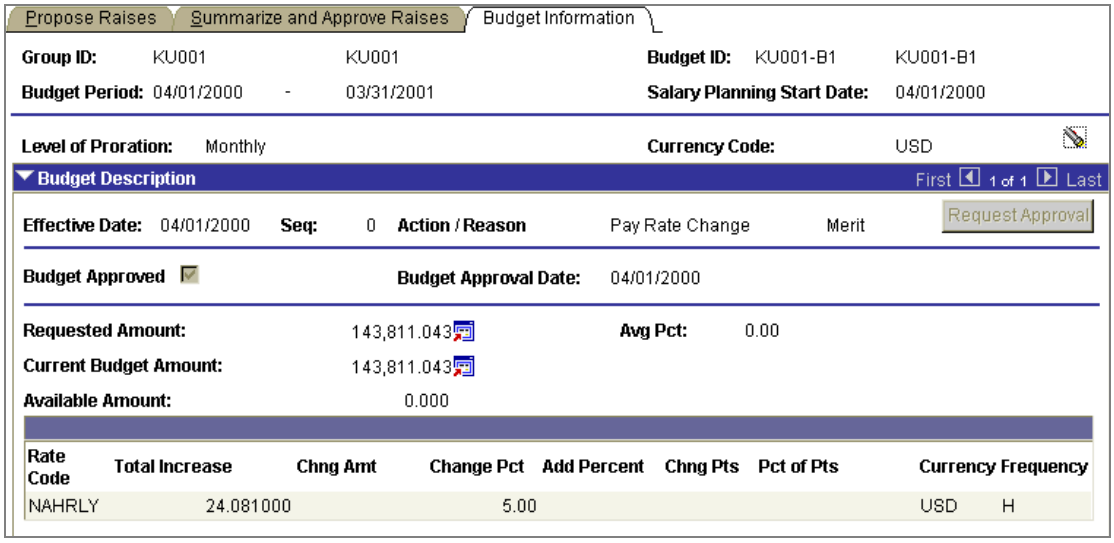
You can't change the status to ***Processed***. The Load Salary Changes process sets the status to ***Processed*** when it loads increases to JOB.

Note. If the Status is ***Processed,*** then you can't modify the Status manually.

Annual Increase Displays the employee's Converted Annual Increase from the Propose Raises page.

Viewing Budget Information

Access the Budget Information page.



Budget Information page

This page is display only. The information is similar to that found on the Budget Requested and Budget Components pages.



Click the **Refresh Budget** button to update the Requested Amount and Available Amount.

Available Amount	Represents the difference between the Current Budget and Requested Budget. It's calculated when you click the **Refresh Budget** button or save the component If the variance appears as a positive amount, the salary plan exceeds the budgeted amount. If the variance is appears as a negative amount, the planned salaries fall short of the budgeted amount.
Request Approval	Displays only if the budget is approved. If the Available Amount is negative and the budget was approved, you must request a new approval (it won't be possible to save without requesting a new approval if available amount is negative). If you don't want to request a new approval, you have to leave the component without saving If you request a new approval, the budget will be unapproved and the Budget Approval Date will be cleared. These changes will be reflected in the Budget Requested pages.

See Also

Budgeting Group Increases

Entering and Calculating Budget Components

Loading Salary Changes to Compensation Records

In this section, we discuss loading salary increases to the compensation records and how to:

- Create and refresh anniversary dates.
- Run salary changes.

Understanding Loading Salary Changes to Compensation Records

After you approve your salary increase plans and budgets, you can load the salary increases to the employees' Job records. The system provides a Load Salary Changes process to load all approved salary increases for the group ID and budget period start date that you specify.

This process 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 Group Increase Budget - 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 Group Increase Budget – Budget Requested page.
- The individual employee increases must be marked *Approved* on the Summarize and Approve Raises page.

Pages Used to Refresh Anniversary Dates

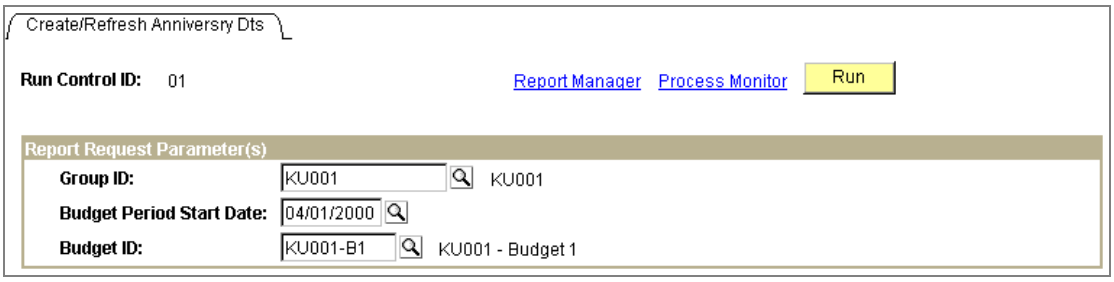
Page Name	*Object Name*	*Navigation*	*Usage*
Create/Refresh Anniversry Dts (create/refresh anniversary dates)	RUNCTL_GRPANNV	Administer Workforce, Plan Salaries (GBL), Process, Create/Refresh Anniversry Dts, Create/Refresh Anniversry Dts	Use this process only if your Salary Increase Plan is based on 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.
Load Salary Changes	RUNCTL_CMP006	Administer Workforce, Plan Salaries (GBL), Process, Load Salary Changes, Load Salary Changes	Run the Load Salary Changes application engine process. The process loads all the new rows into your employees' job and compensation records for the budget date that you specify.

See Also

PeopleTools PeopleBook: Process Scheduler

Creating and Refreshing Anniversary Dates

Access the Create/Refresh Anniversry Dts page.



Create/Refresh Anniversry Dts page

Group ID Enter the ID of the group for which you want to refresh anniversary dates.

Budget Period Start Date Enter the start date of the budget for which you want to refresh anniversary dates.

Budget ID Enter the ID of the budget for which you want to refresh anniversary dates.

Running Salary Changes

Access Load Salary Changes page.



Load All Salary Changes page

Before using this page, 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.

Group ID Enter the group ID for which you want to load salary changes.

Budget Period Start Date Enter the budget period start date for which you want to load the group's salary changes.

Position? Select to choose employees who have a position.

Update Future Rows? Select to update the Job and Compensation future rows with the increase.

See Also

Overview of the Salary Increase Budgeting and Planning Business Process

CHAPTER 7

Processing Mass Salary Increases

This chapter discusses how to:

- Update salaries by salary plan or pay group.
- Update salaries by job code.
- (USF) Administering mass pay adjustments

Updating Salaries by Salary Plan or Pay Group

Use the Update by Sal Plan/Paygroup (update by salary plan or paygroup) process to perform salary grade or step updates for all employees in a salary grade. This is useful if the compensation has changed retroactively. 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 specified time period:

- For grade changes, the system checks the Salary Grade Table for any changes in minimum, midpoint, and maximum pay rate during the specified dates for the employee's job. If it finds a pay rate change, it enters a new job row with the effective date of the grade change.
- For step changes, the system compares the compensation package of the 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, and marks it as a manual change.

To run the Update by Sal Plan/Paygroup process:

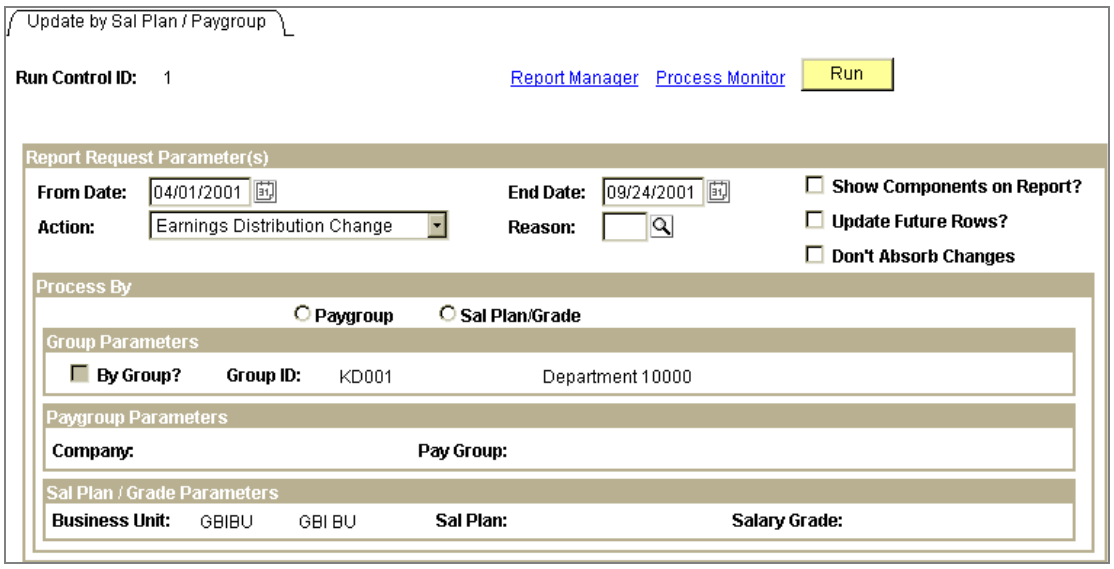
1. Run the process (CMP008) using PeopleSoft Application Engine to apply the update to the salary plan or paygroup.
2. Run the SQR report (CMP008) to review the data created by running the process.
3. Run process (HR_SP_CI) using PeopleSoft Application Engine to load data to the Job Data pages for your employees.

Page Used to Run the Sal Plan/Paygroup Process

Page Name	Object Name	Navigation	Usage
Update by Sal Plan / Paygroup	RUNCTL_CMP008	Administer Workforce, Plan Salaries (GBL), Process, Update by Sal Plan / Paygroup, Update by Sal Plan / Paygroup	Update the job compensation rate when the salary grade or step changes retroactively.

Updating the Job Compensation Rate

Access the Update by Sal Plan / Paygroup page.



Update by Sal Plan / Paygroup page

Report Request Parameter(s)

From Date and **End Date** — Enter the from and end dates of the period. The system retrieves the salary change between these dates.

Show Components on Report? — Select if you want the pay components to appear on the report.

Action and **Reason** — Enter the action and reason defining the salary update on the new job row.

Update Future Rows? — Select to have the process update future dated rows (those rows with an effective date later than the Salary Change Effective Date) with salary information.

Don't Absorb Changes Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the defaulted salary amount.

This option only applies to employees who have a Target Comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

See Also

"Setting Up Salary Plans, Grades and Steps," Defining Salary Plan Characteristics

Process By

Paygroup Select to process by pay group. The fields in the Paygroup Parameters group box become available.

Sal Plan/Grade Select to process by salary plan and grade. The fields in the Sal Plan/Grade Parameters group box become available.

By Group? and **Group ID** Select the process by Group ID. The Group ID field will become available. Enter the Group ID you want to process.

Paygroup Parameters

Company and **Pay Group** Select the company and pay group for which you want to update salaries.

Sal Plan/Grade Parameters

Business Unit, Salary Administration Plan, and **Salary Grade** Select the business unit, salary administration plan, and salary grade for which you want to update salaries.

Updating Salaries by Job Code

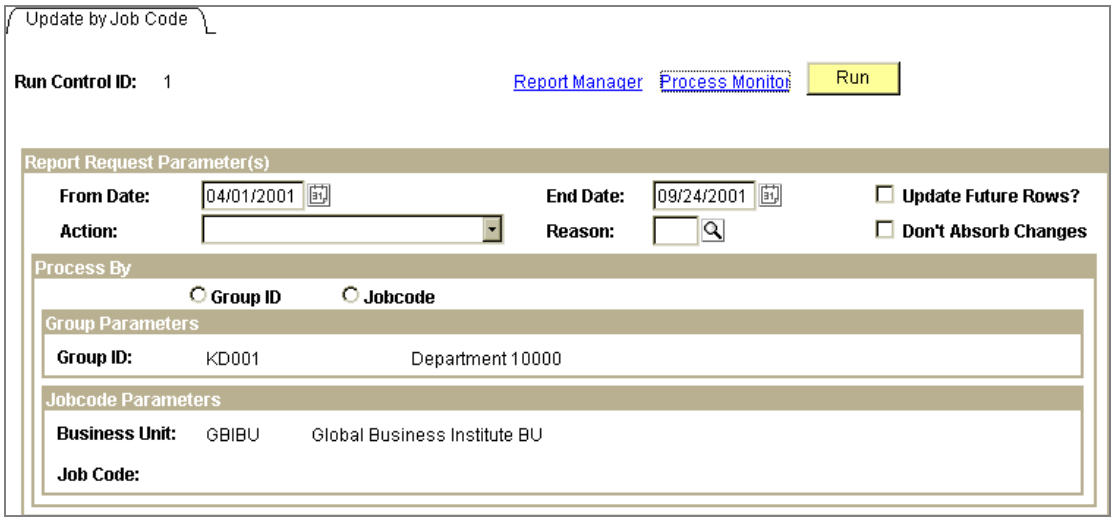
Use the Update by Job Code process to update salary data for all employees in a job code when you change the job code salary administration plan, grade, or step in the Job Code Table. The process inserts a new job row with the action and action reason codes that you specify on the Run Control page. The effective date of the change is the From Date that you specify as the run control parameter.

Page Used to Update by Job Code

Page Name	Object Name	Navigation	Usage
Update by Job Code	RUNCTL_CMP010	Administer Workforce, Plan Salaries (GBL), Process, Update by Job Code, Update by Job Code	Reclassify a job code.

Reclassifying a Job Code

Access the Update by Job Code page.



Update by Job Code page

Business Unit Select the business unit for which you want to update salaries.

Job Code Select the job code that you are updating.

Start Date and **End Date** Enter the start and end dates of the period for which you want to update salaries. The system uses the **Start Date** as the effective date of the salary change.

Action and **Reason Code** Select the action and reason code that you want the system to enter on the new job row for the salary update.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Mass Change"

PeopleTools PeopleBook: Process Scheduler

(USF) Administering Mass Pay Adjustments

With Peoplesoft Human Resources for U.S. Federal Government, you can administer and manage mass pay adjustments. This section helps you identify the processes necessary to administer pay adjustments and shows you how to:

- Understand mass pay adjustments.
- Define the parameters necessary to process pay adjustments for groups of employees.

Understanding Mass Pay Adjustments

During the calendar year, the President or his pay agent may authorize changes in the salary structures for executive branch employees covered by Title 5 of the United States Code. This authority also extends to other employees covered under other sections of Title 5, as well as some employees covered under other sections of the law.

The President may also authorize changes in geographic comparability adjustments such as Locality Pay Adjustments, Interim Geographic Adjustments, or Special Pay Adjustments for Law Enforcement Officers authorized by the Federal Employees Pay Comparability Act (FEPCA) and administered under 5 USC 5304.

The United States Congress, as well as heads of certain agencies, has the discretionary authority to adjust pay for certain categories of their employees. These authorities generally authorize pay adjustments for salaried employees to be effective government-wide at the beginning of the first pay period of the new calendar year.

To administer mass pay adjustments:

1. Define mass pay adjustment parameters on the Mass Pay Type page and the Mass Pay Plan page.
2. Process a pay adjustment for employees on the Mass Pay Adjustments page.
3. Generate a mass pay adjustment report.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook: "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Plan Salaries Reports

Defining Mass Pay Adjustment Parameters

Prior to performing mass pay adjustments, you need to define Mass Pay Types and Mass Pay Plans for each Mass Pay Adjustment Type. The Mass Pay Adjustment Types available on the system include:

- Annual Federal Wage Service

- FWS Special Rate Increase
- GS Annual Pay Adjustment
- GS Special Rate Increase
- LEO Special Pay Adjustment
- Locality Pay Adjustment

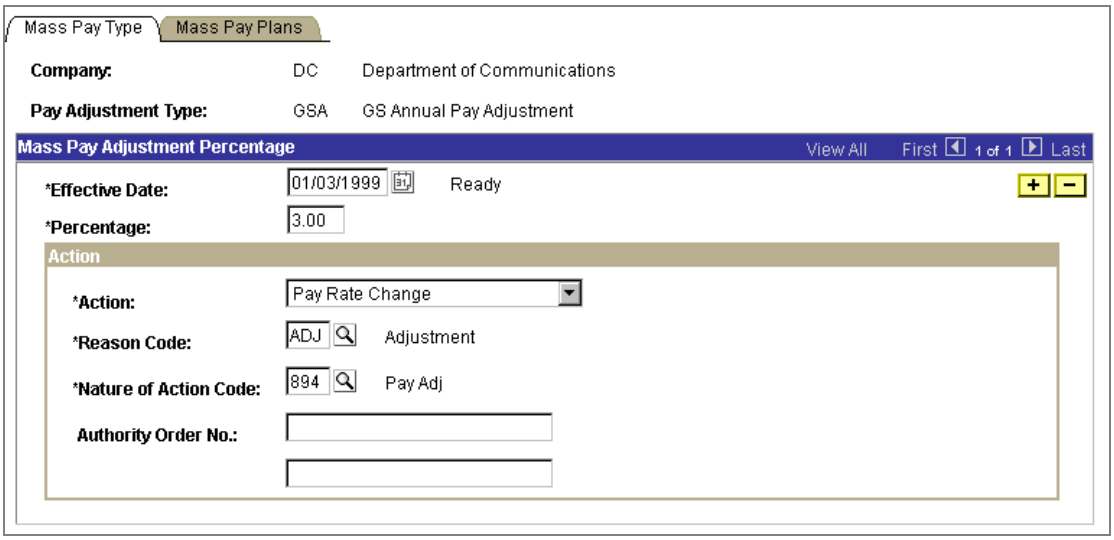
Note. Mass pay adjustments can be processed using either a percentage increase or calculated using the updated pay table salaries. Once the pay adjustment has been calculated, the Next Scheduled Pay Adjustment data on the Salary Plan table needs to be updated in order for any additional pay adjustments to be forwarded.

Pages Used to Define Mass Pay Adjustments

Page Name	*Object Name*	*Navigation*	*Usage*
Mass Pay Type	GVT_MPA_TYPE_TBL	Define Business Rules, Define Payroll Process (USF), Setup 2, Mass Pay Adjustments, Mass Pay Type	Define the percentage of the pay increase and the date that the pay adjustment will go into effect. In addition, adjustment control information, such as Action, Reason Code, and NOA code data is necessary for the SF50.
Mass Pay Plan	GVT_MPA_ERNPGM_TBL	Define Business Rules, Define Payroll Process (USF), Setup 2, Mass Pay Adjustments, Mass Pay Plans	Identifies the pay plan to be included in the pay adjustment processing as well as the type of calculation that is used. Multiple pay plans can be processed one at a time.
Mass Pay Adjustment	RUN_FGPY005	Define Business Rules, Define Payroll Process (USF), Process, Mass Pay Adjustments	Indicate the parameters required to process the mass pay adjustments, or, alternatively, to generate a report. You can process a single agency and pay adjustment type or multiple agencies and adjustment types.

Defining a Mass Pay Type

Access the Mass Pay Type page.



Mass Pay Type page

Percentage Specify the percentage of increase for the pay adjustment. If the calculation type on the Mass Pay Plan equals ***Percent,*** the system will use the value in this field. The **Effective Date** and **Percentage** entered become part of the key fields on the Mass Pay Plan table.

Action Specify the appropriate action code for this mass pay adjustment. The value selected here will be reflected on the Data Control page at the employee level.

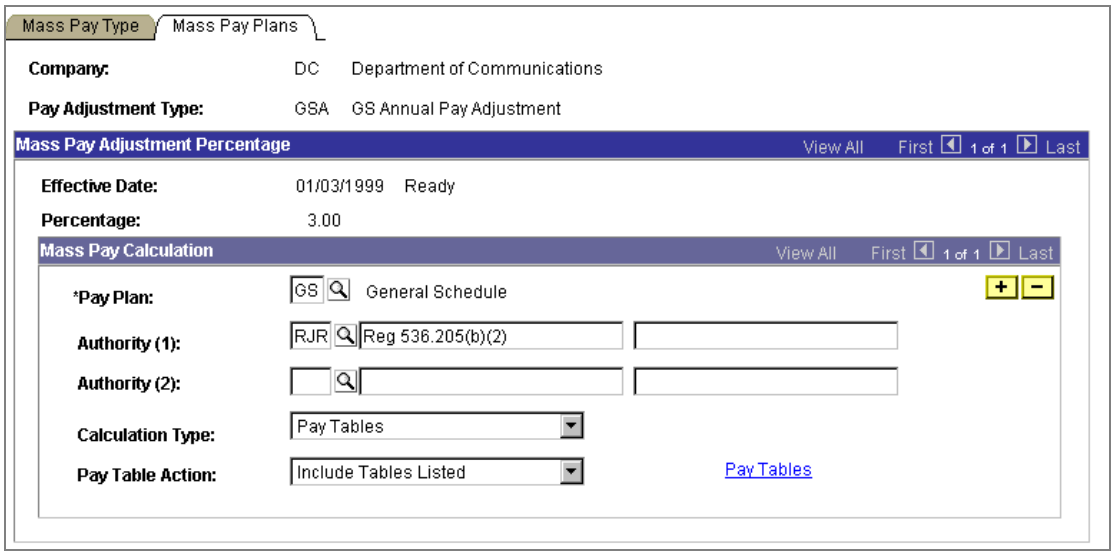
Reason Code Enter the corresponding reason code for the specified action. The value selected here will be reflected on the Data Control page at the employee level.

Nature of Action Code Enter the NOA code.

Authority Order No. Use this free-format field to enter the executive order number or other legal authority number that identifies which executive order was issued for pay raises. This information will print on SF50.

Defining a Mass Pay Plan

Access the Mass Pay Plan page.



Mass Pay Plans page

Pay Plan Enter the pay plan for the group of employees to receive the pay adjustment. You can include multiple pay plans, if necessary.

Authority (1), Authority (2) Enter the authorities for the mass pay adjustment.

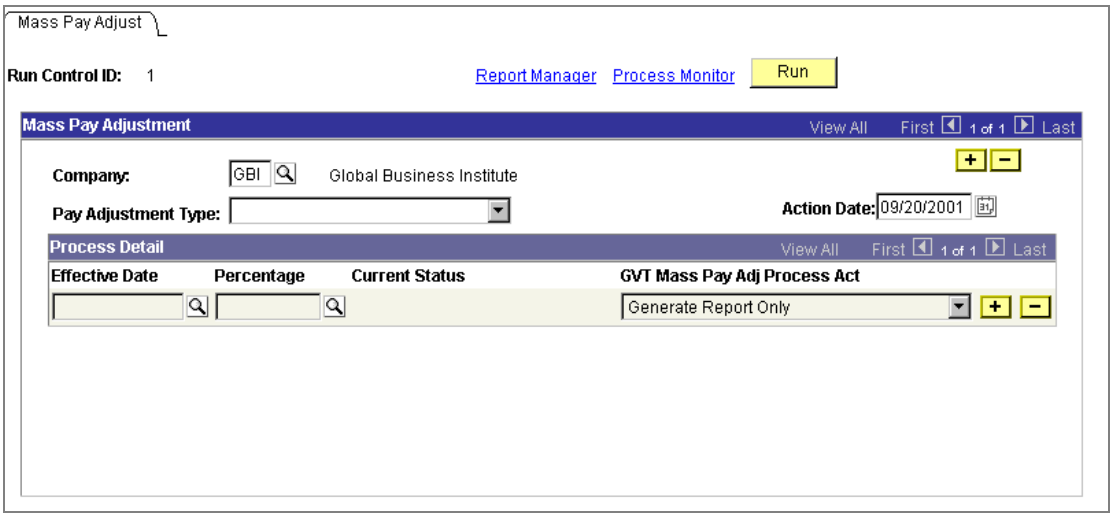
Calculation Type Specify the type of calculation to be used in pay adjustment processing: ***Pay Tables, Percentage,*** or ***Special Calculation Routine.***

Pay Table Action Specify which pay table entries should be included or excluded from the pay adjustment. Valid values are ***Exclude Tables Listed, Include All For Pay Plan,*** and ***Include Tables Listed.*** Unless all pay tables are to be included in processing pay adjustments, the Pay Tables link will display to enable you to specify the appropriate selections.

Pay Tables Select this link to access the Mass Pay Adjustment Pay Tables.

Defining Mass Pay Adjustments

Access the Mass Pay Adjustments page.



Mass Pay Adjustments page

Pay Adjustment Type Select the type of pay adjustment to be processed by agency. You can process multiple agencies and pay adjustment types.

Percentage Specify the percentage.

GVT Mass Pay Adj Process Act Indicate whether you want to generate a report only or process the action and produce a report.

Generating a Mass Pay Adjustment Report

The Mass Pay Adjustment report lists employees who cannot be processed.

You can generate this report prior to running the adjustment or set up to print with the processing of the adjustment. If you run this report prior to processing the Mass Pay Adjustment, you'll be able to determine which employees have an exception. You can then make any corrections so all employees who should be receiving the adjustment will be processed.

The exceptions that will appear on the report are as follows:

- Pay Rate Determinant of employee – review and process manually.
- Future effective-dated action detected – review and process manually.
- Duplicate action found for transaction – review and process manually.
- No pay rate found for the employee.
- No hourly conversion factor for employee standard hours.
- The FEGLI base rate is not updated because of the override flag.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook: "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Plan Salaries Reports

CHAPTER 8

(JPN) Updating Salaries for Japan

This chapter provides an overview of Japanese salary updating methods and shows you how to:

- Update salaries by step increase.
- Update salaries by salary amount increase.
- Update salaries by percentages.

Understanding Updating Salaries for Japan

The methods for updating salaries in Japan involve some functionality-specific setup and, depending on the salary increase method your organization uses, some or all of the following:

- Calculation of increases based on employee review results.
- Simulation of salary increases and manual adjustments.
- Loading of salary increases to employee job compensation records.

The three salary increase methods are:

- Step increases.
- Amounts.
- Percentages.

The final processes associated with each of these methods produce new compensation records for each employee with an action of *Pay Rt Change* and a reason of *Salary Increase by Step, Salary Increase by Amount*, or *Salary Increase by Percent.*

All the salary increase processes include employee review results in their calculation. Because review IDs are actually effective dates and the system automatically retrieves the results of the latest salary review after you specify the review ID for the process, you can be sure the system will use correct review results.

Prerequisites

All three salary increase methods must be based on employee reviews that have been resolved into a review band, meaning that employee reviews for these salary increase methods must be based on a review rating scale that has a scale type of *Review Band.*

Load Process

The load processes that are associated with each of the three salary increase methods—load steps, load amount, and load percentage increase—include a check of the employee's job record effective dates, action and action reason, and job code. The load process terminates for the employee and reports the employee on the error list if either of these conditions exists:

- A job row has an effective date equal to the Salary Increase Date that you set, and the action and reason combination is *Promotion* and *Salary Grade Advance.*
- A job row has an effective date equal to the Salary Increase Date that you set, and there's a difference between the Job Code for that effective-dated job row and the Job Code for the previous effective-dated job row.

See Also

"Reviewing Employee Performance"

PeopleTools PeopleBook: Process Scheduler

Common Elements Used to Update Japanese Salaries

Language	Required because, although this batch process is a load process, there may be an error list that you need to read.
SetID	Enter the setID for the review ID that the system should use to calculate the employee's review-based salary increase. Because you can link a single review ID to multiple setIDs, you must identify the review by its setID and its own ID.
Review ID	Enter the ID of the review on which the selected process is to base its load.

Updating Salaries by Step Increase

Updating salaries by step increase requires that you set up a Step Increase Table in which you associate several salary steps with a review band. Each employee's review band is derived from the points awarded by single or multiple reviewers using weighted or nonweighted reviews. After you have the salary step increase for each review band and each employee's review band, you can run a process to load the salary step increases for each employee.

Note. To run the update process for this method of salary increase, select the Multi-Step Grade check box on the Installation Table – HRMS Options page.

To update salaries by step increase:

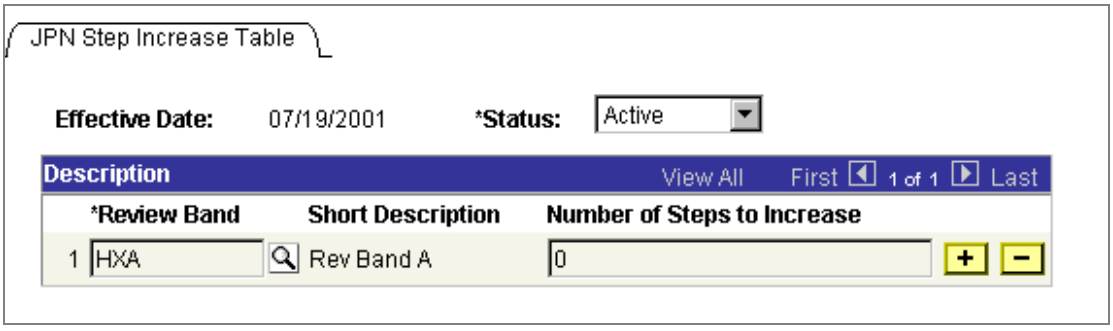
1. Set up review bands and the number of steps to increase.
2. Run the JPN Load Salary Steps process.

Pages Used to Update Salaries by Step Increase

Page Name	*Object Name*	*Navigation*	*Usage*
JPN Step Increase Table	STEPINC_TBL_JPN	Administer Workforce, Plan Salaries (GBL), Setup Lcl, JPN Step Increase Table	Associate several salary step increases with a review band.
JPN Load Salary Steps	RUN_STEP_JPN	Administer Workforce, Plan Salaries (GBL), Proc Lcl, JPN Load Salary Steps	Update the salary step and associated compensation on the job record for employees who have a fixed amount Plan/Grade/Step-based salary component.

Setting Up Step Increases

Access the JPN Step Increase Table page.



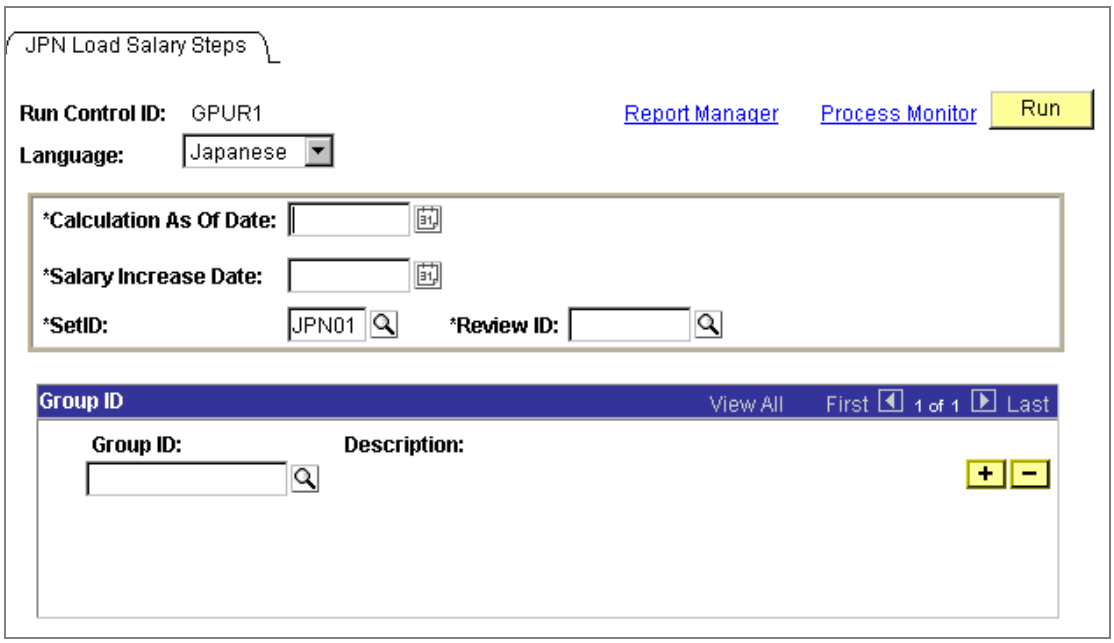
JPN Step Increase Table page

Review Band Enter the review band with which to associate several salary step increases.

Number of Steps to Increase Enter the number of salary step increases to associate with the review band that you entered. Employees in this review band receive the salary that's associated with the step they move to. For example, if they increase three steps for being in Review Band A, they increase from the salary for step 2 to the salary for step 5.

Processing Step Increases

Access the JPN Load Salary Steps page.



JPN Load Salary Steps page

Calculation As Of Date The effective date the system uses to determine which job compensation record it should use to obtain the employee's current data to calculate the new data. For example, if the employee's review band earns the employee a three-step increase, the system must use the existing step to calculate the new step.

Salary Increase Date This becomes the effective date of the new job record that the system inserts for the employee for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Step.*

Group ID Enter specific groups for the system to process. If you select no groups, the system processes all employees who have a salary plan, grade, and step on their compensation record with a compensation rate code that's defined in the Salary Rate Code Table.

Updating Salaries by Salary Amount Increase

Using the updating salaries by salary amount increase method requires that you set up a Salary Increase Amount Table in which you associate a compensation rate code with review bands and monetary increase amounts with each review band. Each employee's review band is derived from the points awarded by single or multiple reviewers using weighted or nonweighted reviews. After you have the salary increase amount for each review band and each employee's review band, you can run a process to load the salary increase for each employee.

When you set up the Salary Increase Amount Table, you can select only compensation rate codes that are flat amount types and not of class *GRPPAY* or *SENPAY*.

To update salaries by salary amount:

1. Set up rate codes, review bands, and increase amounts.
2. Run the JPN Load New Salary Amount process.

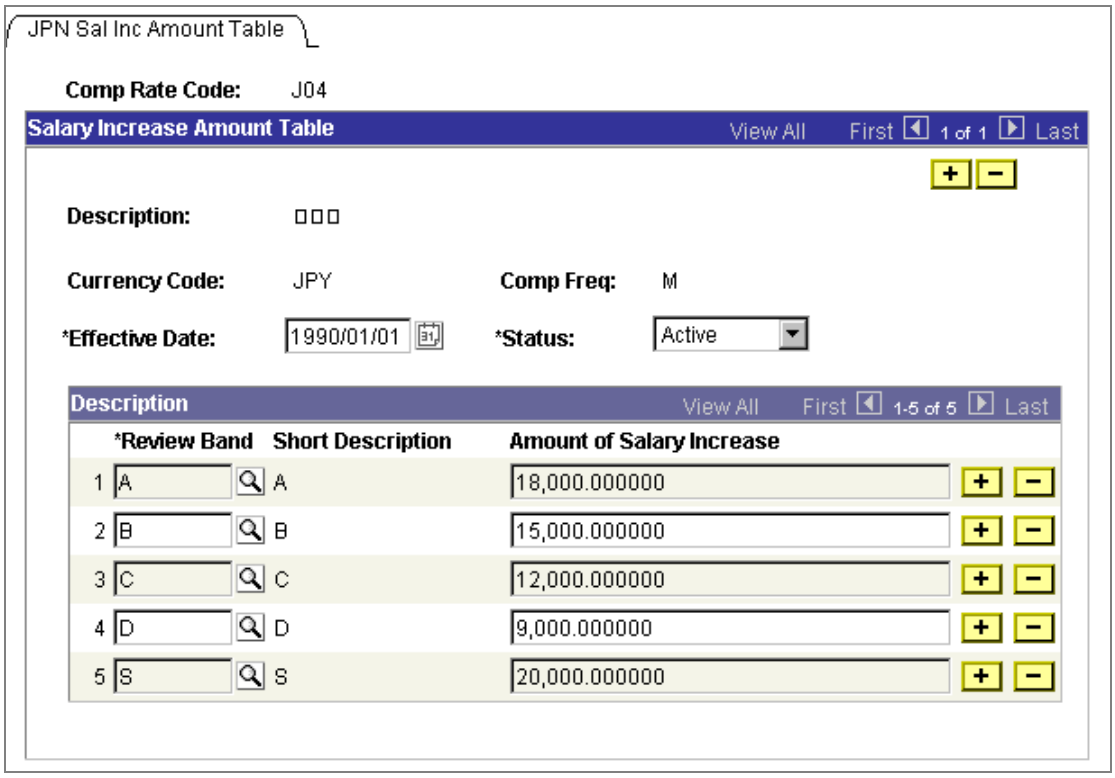
Pages Used to Update Salaries by Salary Amount Increase

Page Name	*Object Name*	*Navigation*	*Usage*
JPN Sal Inc Amount Table (JPN salary increase amount table)	SALINC_AMT_TBL_JPN	Administer Workforce, Plan Salaries (GBL), Setup Lcl, JPN Sal Inc Amount Table	Define the salary increase amount for a particular compensation rate code and review band.
JPN Load New Salary Amount	RUN_UPSALAMT_JPN	Administer Workforce, Plan Salaries (GBL), Proc Lcl, JPN Load New Salary Amount	Execute the salary update process using the values that you've set in the Sal Inc Amount Table.

Setting Up Salary Amount Increases

Access the JPN Sal Inc Amount Table page.

To do so, enter the compensation rate code whose value you're updating. The comp rate code must *not* be of class *SENPAY* and must be of type *Flat Amount*



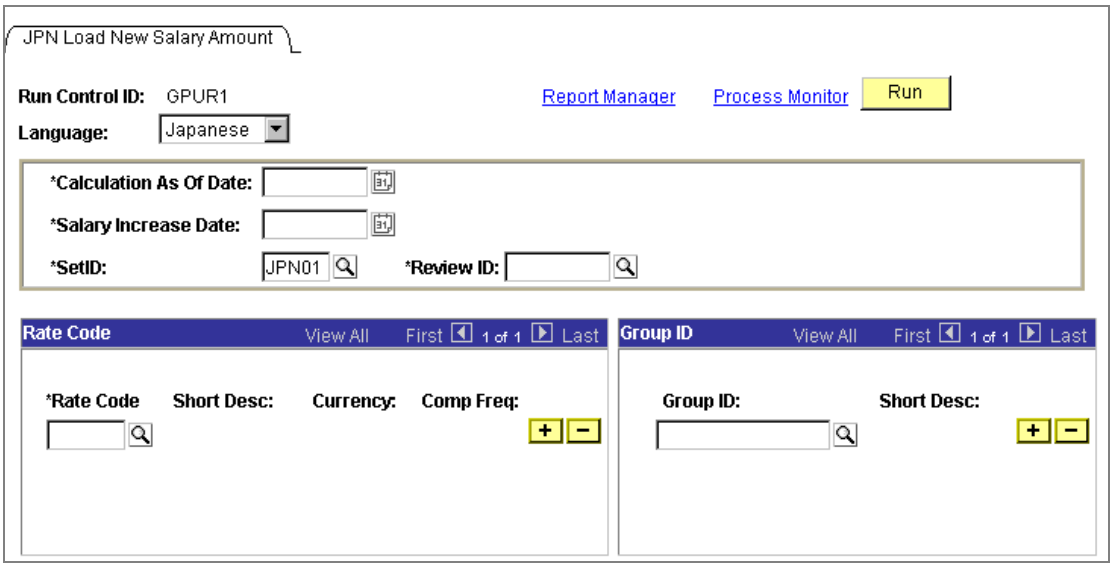
JPN Sal Inc Amount Table page

Review Band Enter the review band for which to enter a salary increase amount.

Amount of Salary Increase Enter the amount of the salary increase for employees whose review results put them in the review band that you specified.

Processing Salary Amount Increases

Access the JPN Load New Salary Amount page



JPN Load New Salary Amount page

Calculation As Of Date The effective date that the system uses to determine from which job compensation record it should get the employee's current data to calculate new data. For example, if the employee's review band earns the employee a ¥N increase, the system must get the existing rate code amount to calculate the new rate code amount.

Salary Increase Date Becomes the effective date of the new job record that the system inserts for the employee for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Amount.*

Rate Code Enter the rate codes for which you defined a salary increase to include in this load process. The system displays the short description, currency, and compensation frequency associated with each rate code.

Note. You defined your salary increases by comp rate code and review band. You can run the process for multiple rate codes.

Group ID Enter group IDs for employees to be included in this process. Leave this blank to have job compensation records updated for all employees who have the rate code that you specified. If an employee in a group that you specify doesn't have the comp rate code that you specified for processing, the system skips the employee without processing.

Updating Salaries by Percentages

To use the updating salaries by percentages method, which includes a simulation process that shows the effects of various increase options, you set up two tables—the Salary Increase ID

Table and the Salary Increase Matrix Table. On the Salary Increase ID Table, you specify a single compensation rate code, which must be of class *Defined Range Pay (DFRPAY)* and of type *Flat Amount.* You then run the simulation process, which, like other methods, uses review results in its calculation. You can adjust the result of the simulation for employees, increasing or decreasing it, and view the overall results—the totals—online. When you're satisfied with the results, you run a second process, similar to the processes that conclude the other methods, to load the salary increase amounts to the employees' job compensation records.

Note. To use this salary increase method, select the Defined Range Check for Japan check box on the JPN Salary Components Settings page.

To update salaries by percentage:

1. Define a Japanese salary increase ID.
2. Set up a Japanese salary increase matrix.
3. Run the Run Salary Inc Table process.
4. Run the salary increase simulation and adjust as required.
5. Run the load salary increase process.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality," Establishing Japanese Salary Component Settings

Pages Used to Update Salaries by Percentage

Page Name	*Object Name*	*Navigation*	*Usage*
JPN Salary Increase ID Table	SALINC_ID_TBL_JPN	Administer Workforce, Plan Salaries (GBL), Setup Lcl, JPN Salary Increase ID Table	Define a salary increase ID and associate a rate code—which must be of class *DFRPAY* and of type *Flat Amount*—and employee groups with it. You run the salary increase simulation by salary increase ID.

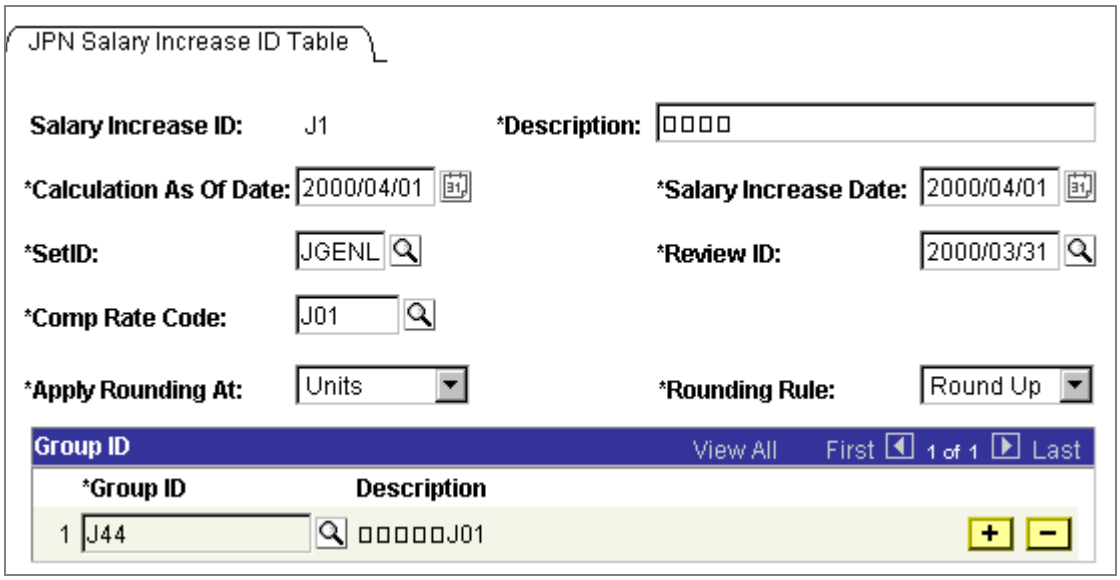
Page Name	Object Name	Navigation	Usage
JPN Salary Increase Matrix Table	SALARY_MATRIX_JPN	Administer Workforce, Plan Salaries (GBL), Setup Lcl, JPN Salary Increase Matrix Tbl	Establish the fixed percentage increase for each review rating by quartile. The fields on this page are identical to the Salary Increase Matrix Table page's.
JPN Run Salary Inc Table (JPN run salary increase table)	RUN_CMPCALC_JPN	Administer Workforce, Plan Salaries (GBL), Proc Lcl, JPN Run Salary Inc Table	Enter the parameters for running the salary increase process and populating the Salary Increase Simulation Table.
JPN Salary Increase Simulation	SALINC_SIML_JPN	Administer Workforce, Plan Salaries (GBL), Use Lcl, JPN Salary Increase Simulation	View the results of running the simulation process. All fields in the results grid are display-only, besides Adjustment Amount on the Changes tab, in which you can adjust the amount of an individual's salary increase.
JPN Load Salary Increase	RUN_UP_SALINC_JPN	Administer Workforce, Plan Salaries (GBL), Proc Lcl, JPN Load Salary Increase	Update employee job compensation records with the results of the salary increase and adjustment results.

See Also

"Setting Up Salary Plans, Grades and Steps," Defining a Salary Increase Matrix

Defining Salary Increase IDs

Access the JPN Salary Increase ID Table page.



JPN Salary Increase ID Table page

Calculation As Of Date The effective date that the system uses to determine from which job compensation record it should get the employee's current data to calculate new data. For example, if the employee's review band earns an employee a 6 percent increase, the system must get the existing rate code amount to calculate the new rate code amount.

Salary Increase Date This becomes the effective date of the new job record that the system inserts for the employee for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Percentage.*

Comp Rate Code (compensation rate code) Enter the rate code. It must be of the class *Defined Range Pay (DFRPAY)* and of the type *Flat Amount*.

You can add only one compensation rate code for each salary increase ID, and only one salary increase ID is associated with each simulation run. To run a simulation for a different comp rate code, you must define additional salary increase IDs.

Note. You can't have more than one rate code of class *DFRPAY* on a single employee's Job Data - Compensation record.

The process that populates the Salary Increase Simulation Table includes all employees in the groups that you specify who have this compensation rate code and the currency code and frequency set on the Compensation Rate Code Table for this rate code.

Note. If you've changed the default currency code or frequency from that set on the compensation rate table in the employees' job compensation record, those employees go into error and aren't included in the simulation.

Apply Rounding At

- This is the numerical "place" to apply the rounding rule you select.

Rounding Rule

Select the rounding rule for the simulation process based on this salary increase ID. Options are:

- ***Round***
- ***Round Down***
- ***Round Up***

Group ID

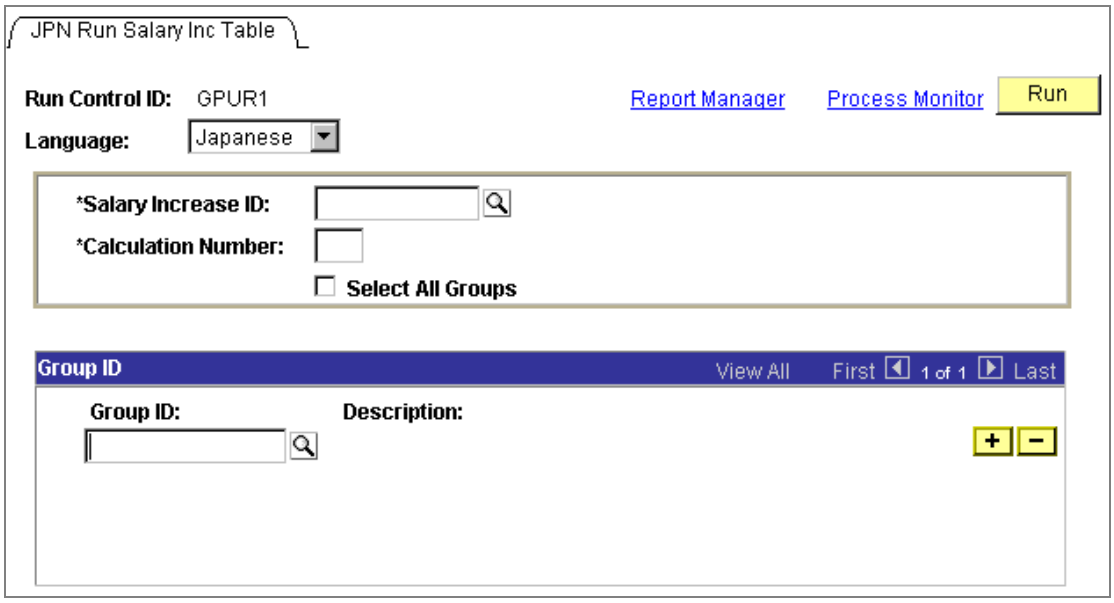
Enter the group IDs for the employees being included in this process.

You must enter at least one group ID to complete this process. If an employee in a group that you specify doesn't have the compensation rate code that you specified for processing, the system skips the employee without processing.

Note. This salary update method retrieves the required percentage increase from the salary matrix table where you linked review bands to percentage increases, quartile by quartile.

Processing Salary Increases

Access the JPN Run Salary Inc Table page.



JPN Run Salary Inc Table page

Salary Increase ID Enter the salary increase ID for which to run the simulation.

Calculation Number Enter the number that identifies a particular simulation in a series that you might run for comparison purposes.

Note. If you try to run a simulation with a combination of salary increase ID, calculation number, and group ID for which results exist, you get a warning. If you proceed, the results of the previous simulation are overwritten. To add groups to or remove them from an existing simulation and maintain the results of the previous simulation, change the calculation number.

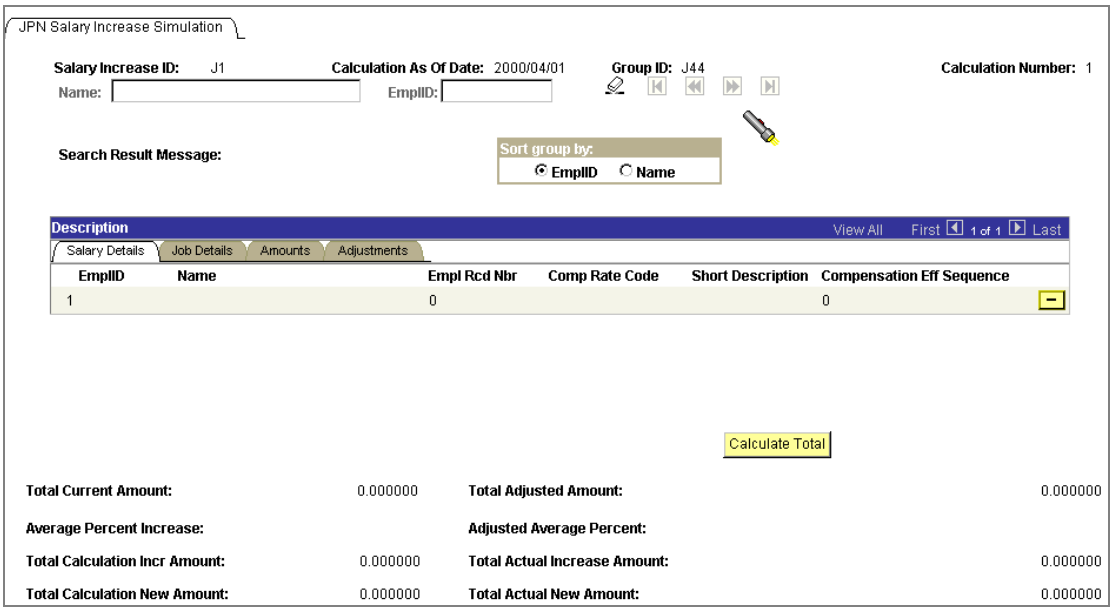
Select All Groups Select to have the system populate the Group ID group box with all groups that you originally associated with this salary increase ID.

Group ID If you don't want to run the simulation for all the groups that you associated with this salary increase ID, clear the **Select All Groups** check box and enter only those groups to process.

Note. This process includes only employees with the single compensation rate code that's associated with the salary increase ID, but only if their currency code and frequency are the same as the compensation rate code default.

Running a Salary Increase Simulation

Access the JPN Salary Increase Simulation page.



JPN Salary Increase Simulation page

Name and **EmplID (employee ID)** — Enter this information for a single employee if you're viewing and possibly adjusting simulation results for one person.

Search Result Message — Displays the range showing on the page and the total of the search results.

Sort group by

EmplID (employee ID) and **Name** — Select to have the grid display simulation results by employee ID or employee name, respectively.

Simulation Statistics

Note. The (bracketed) number for each Total field is used in the field description to identify where the derived results come from. The Amounts and Adjustments tabs indicate on which page the column appears.

Total Current Amount (1) — The total of the Amount Before Salary Increase column (Amounts).

Total Adjusted Amount (2) — The total of the Adjustment Amount column (Adjustments).

Average Percent Increase (3) — The average of the Salary Increase Percent column (Amounts) (or 5/1).

Adjusted Average Percent (4) — The average of the Adjusted Sal Inc Percent column (Adjustments) (or 6/1).

Total Calculation Incr Amount (total calculation increase amount) (5)	The total of the Amount of Salary Increase column (Amounts) (or 1 × 3).
Total Actual Increase Amount (6)	The Total Calculation Incr (increase) Amount plus Total Adjustment Amount (or 5 + 2).
Total Calculation New Amount (7)	The total of the New Salary Amount column (Adjustments) (or 1 + 5).
Total Actual New Amount (8)	The total of the Adjusted Salary Amount column (Adjustments) (or 7 + 2).

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all available columns.

Salary Details Tab

EmplID (employee ID)	Displays the IDs of all the employees in the group that you entered to access this page. You can have the display sorted by this first column. The employee ID is repeated on all the pages of this component.
Name	Displays the names of all the employees in the group that you entered to access this page. You can have the display sorted by this second column.
Empl Rcd Nbr (employment record number)	Displays each employment record number if it isn't *0*. Blank = record number *0,* meaning that the employee has only one employment record.
Comp Rate Code (compensation rate code)	The compensation rate code associated with this salary increase ID.
Compensation Eff Sequence (compensation effective sequence)	Displays the compensation effective sequence that comes from the employee's compensation record on the Job record.

Amounts Tab

Amount Before Salary Increase	The employee's salary before the simulation was run.
Review Band	Displays the review band that the employee's review results indicate. The salary increases come from the increase percentages that you linked to review bands in the Salary Increase Matrix Table.
Salary Increase Percent	The increase in salary, expressed as a percentage of the Amount Before Salary Increase.

Amount of Salary Increase — The amount by which the Amount Before Salary Increase is increased as a result of running the salary increase process—the increase in the salary amount before any adjustments.

Adjustments Tab

New Salary Amount — Displays the amount of the salary after the simulated increase: the Amount Before Salary Increase (Amounts) plus the Amount of Salary Increase.

Adjustment Amount — The only field available for entry in the otherwise display-only grid. You can manually adjust the New Salary Amount by adding or subtracting an adjustment amount here.

Note. If you change the value in this field, save before you move to the next set of records using the navigation buttons below the calculation number. If you don't save, you receive a warning that your changes won't be stored.

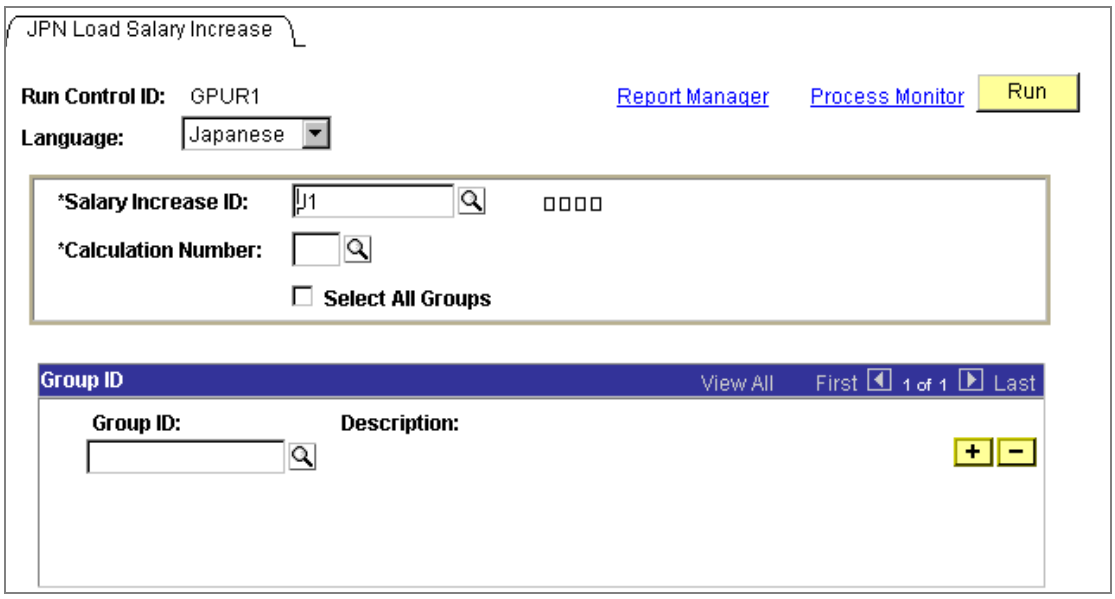
Adjusted Salary Amount — The system updates this field online according to any adjustments that you make. It's the new salary amount after adjustment or the New Salary Amount plus or minus the Adjustment Amount.

Adjusted Sal Inc Percent (adjusted salary increase percentage) — The system updates this field according to any adjustments that you make. It's the salary increase percentage after adjustment, calculated by:

(Adjusted Salary Amount / Amount Before Salary Increase − 1) × 100.

Loading Salary Increases

Access the JPN Load Salary Increase page.



JPN Load Salary Increase page

Salary Increase ID Enter the salary increase ID for which you ran the simulation and for which the results are to be loaded to employee job compensation records.

Calculation Number Enter the calculation number of the particular simulation results to be loaded.

Select All Groups Select to have the system populate the Group ID section with all the groups that you originally associated with this salary increase ID and calculation number combination.

Group ID If you don't want to run the simulation for all the groups that you associated with this salary increase ID for this calculation number, clear the **Select All Groups** check box and enter only groups that are to be processed.

CHAPTER 9

(FRA) Forecasting Salaries for France

This chapter provides an overview of salary forecasting and shows you how to:

- Understand salary forecasting.
- Define periods.
- Set up events.
- Define scenarios.
- Forecast compensation.
- Purge and view scenario history.
- Understand technical details.

Understanding Salary Forecasting

Use Salary Forecasting, a French-specific business process, as an analysis tool or as a forecasting tool. Either analyze the changes in compensation for a group of employees in past periods or simulate how hypothetical events occurring in the future will affect compensation. Because you can see how various events affect your compensation package, this business process is useful for human resources managers or executives wanting to build compensation budgets.

Salary Forecasting is compliant with the rules of the French Analysis Method for compensation variations called La Masse Salariale. The analysis method that the business process employs enables you to calculate independently the impacts of any compensation decisions for a group of employees for a future time period. The reports provided are also in accordance with La Masse Salariale.

There are three steps for using the Salary Forecasting business process:

1. Set up your data.
2. Run the calculations.
3. Run and view the reports.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Plan Salaries Reports

Setting Up Salary Forecasting

If you use the Salary Forecasting business process for forecasting purposes, then set up events for modeling the future compensation.

If you use the business process for comparison of two past periods, then don't set up any events. Note that the calculation process ignores events defined on past periods.

Here's what to do to set up salary forecasting:

1. Define, one at a time, two like periods of time.

   These time periods can be past, current or future periods of time. Usually, you compare two equivalent periods of time, referred to as the reference and the analysis periods.

2. Associate the periods for comparison or forecasting.

3. Define groups, if not already created.

   Define employee groups using the Group Build module. Each person defined in a group used in the Salary Forecasting business process must have in his or her compensation package, rate codes attached to a rate code class. Use the Rate Codes without rate code class report to verify.

4. Define the various events that you want to apply to the employee groups whose compensation you want to analyze and forecast.

   The events can be of various types, as described in the next section. You might also define additional setup data such as pro-ration rules or specific hours rate.

4. Ensure all events for one scenario have the same elementary period.

5. Define your proration rules (optional).

6. Define your rates for hours worked (optional).

5. Group together events into a scenario.

   At the scenario level, define a set of events to apply to groups of employees for a given time period.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Groups"

Standard Terms

Periods

Period Types

There are four period types that define the periods of comparison:

- Month
- Quarter
- Semester (six months)
- Year

Periods or Periods of Comparison

Periods, or periods of comparison, are the periods being compared. Use salary forecasting in two ways: to analyze two past periods or to forecast a future period, using the current period as a base.

Reference Period

For forecasting, this period is likely to contain the current date. For comparing past periods, use any period as a basis for comparison

Analysis Period

For forecasting, this is a future period contiguous with the reference period. For comparing past periods, this period must be contiguous with and prior to the reference period.

Elementary Period Types

This is how often the module processes its calculations.

There are two elementary period types, coinciding with your possible payroll dates:

- Monthly
- Semi-monthly: more accurate but takes more processing time.

Suppose that you select Year as the period type, and semi-monthly as the elementary period type. The module makes 24 calculations. If you select Monthly as the elementary period type, the module makes 12 calculations.

Select the elementary period type when you define events.

Elementary Periods

The monthly or semi-monthly segments of a comparison period. Whether the segments are monthly or semi-monthly is determined by the selected elementary period type.

- Past Elementary Period: any elementary period that is prior to and does not contain the current date (date of processing).
- Current Elementary Period: The elementary period that contains the current date (date of processing).
- Future Elementary Period: any elementary period that has its start date greater than the current date.

The process manages the current elementary period exactly the same way it manages any past elementary period. The process manages future elementary periods by copying the data calculated for the current elementary period.

Triggering Period Enter the date the event is to occur (or trigger) within the analysis period.

Working Periods The two periods (always one analysis and one reference periods) that you associate for either comparing or forecasting. They are defined by a Working Period Id.

There are a few rules for the two periods associated as working periods.

- The two periods must have the same period type.
- The two periods must be contiguous: 1994 and 1995, this year and next year, this month and next month.
- No time periods can overlap.

When using the Salary Forecasting module to analyze the future, use the present as the reference period. This is true for all period types: analyze this year against next year, this month against next month, and so on.

Working Periods ID Select this value which must be the same for all events in a scenario.

Events

Event ID Identifies a compensation event in the system. Enter for each event that you define.

Event Type Select from these choices: *Headcount Increase, Headcount Decrease, Compensation Increase, Promotion, Seniority Increase, Incentives,* and *Working Schedule.*

Defining Periods

In this section we discuss how to:

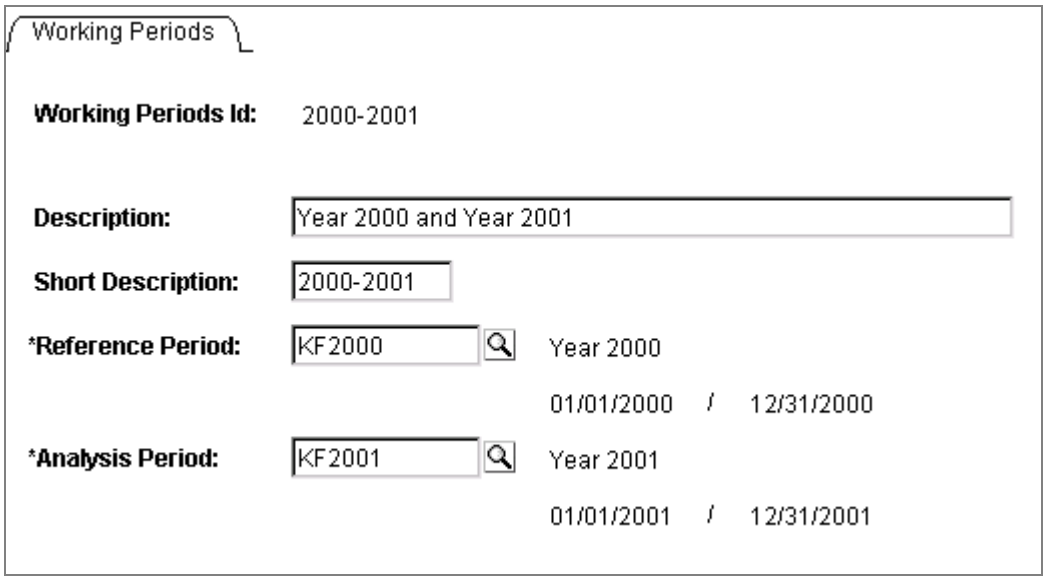
- Define periods and assign them a period type.
- Associate contiguous time periods for analysis or forecasting.

Pages Used to Define Periods

Page Name	*Object Name*	*Navigation*	*Usage*
Period Definition	LMS_PERIOD_DEFN	Compensate Employees, Forecast Compensation (FRA), Setup, Periods, Period Definition	Define the time periods to compare and analyze compensation. Each time period is a Time Period ID.
Working Periods	LMS_WRK_PD_DEFN	Compensate Employees, Forecast Compensation (FRA), Setup, Working Periods, Working Periods	Associate two contiguous time periods together. If you analyze two past periods, do not include the current period. If you forecast for the future, the reference period is the current period.

Associating Contiguous Working Periods

Access the Working Periods page.



Working Periods page

Reference Period For forecasting, select the current period –*Month, Quarter, Semester* or *Year*– depending on what period type you selected on the Period Definition page. For comparing past periods, select any past period.

Analysis Period For forecasting, this must be a future period contiguous with the reference period, of the proper length for the period type. For comparing past periods, select any past period contiguous with the reference period. The system ensures that the reference and analysis periods don't overlap, that they are contiguous, and that they are of the same type.

Setting Up Events

An event is an action (or a set of actions) applied to a group of employees. Events are the building blocks of your scenarios. Define and reuse events in many scenarios as long as the scenarios apply to the same set of time periods. In this section, we discuss how to:

- Define a headcount increase event.

  Add employees into any group (by job code or position) to simulate hiring or to study the effects of proposed organizational changes.

- Set up an award (incentive) for a group.

  This enables you to see the effect of awarding a lump sum amount at a specific point in time. The incentive event is rather simplistic here because the Variable Compensation module offers a more complex simulation. The Variable Compensation module enables you to perform different scenarios to determine the

maximum, target, and minimum awards for a group of employees based on a given plan of specific business rules.

- Define a compensation increase.
- Define a headcount decrease.
- Simulate a promotion.

  A promotion is defined a move from a Job Code to another Job Code.

- Define a seniority event.

  This event simulates the impact of seniority increases.

- Define work weeks for calculations.

  A working schedules event determines the impact of changing the working schedule for a group of employees.

- Set up proration rules.
- Define overtime rates.

See Also

PeopleSoft Human Resources PeopleBook: Managing Variable Compensation, "Calculating Allocations and Awards"

Pages Used to Set Up Events

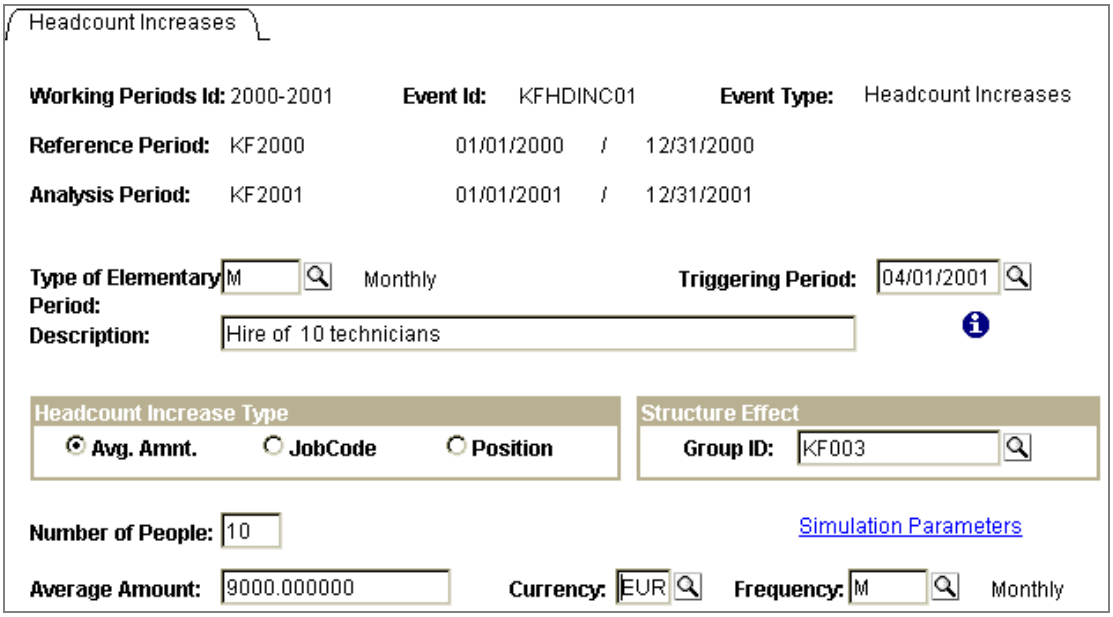
Page	*Object Name*	*Navigation*	*Usage*
Headcount Increases	LMS_ENTRIES	Compensate Employees, Forecast Compensation (FRA), Setup, Headcount Increases, Headcount Increases	Define a Headcount Increase event.

Page	Object Name	Navigation	Usage
Simulation Parameters	LMS_ENTRIES_SEC	Compensate Employees, Forecast Compensation, Setup, Headcount Increases	Define additional parameters if the selected job code or position has compensation packages containing pay components expressed either in points or in a weekly frequency. Define the standard hours per standard work period or the points value and currency required by the calculation process for correctly handling the conversion of those pay components.
Incentives	LMS_INCENTIVES	Compensate Employees, Forecast Compensation (FRA), Setup, Incentives, Incentives	Set up a future award for a group.
Compensation Increase	LMS_INCREASE	Compensate Employees, Forecast Compensation (FRA), Setup, Compensation Increases, Compensation Increase	Define a compensation increase event.
Headcount Decrease	LMS_LEAVES	Compensate Employees, Forecast Compensation (FRA), Setup, Headcount Decreases, Headcount Decrease	Define a headcount decrease event.
Promotions	LMS_PROMOTION	Compensate Employees, Forecast Compensation (FRA), Setup, Promotions, Promotions	Simulate promotions for all people in a group.
Seniority	LMS_SENIORITY	Compensate Employees, Forecast Compensation (FRA), Setup, Seniority, Seniority	Define a seniority event.

Page	*Object Name*	*Navigation*	*Usage*
Working Schedule	LMS_WRK_SCHEDULE	Compensate Employees, Forecast Compensation (FRA), Setup, Working Schedules, Working Schedule	Use to define work weeks for the calculations.
Proration Rules	LMS_PRORATION	Compensate Employees, Forecast Compensation (FRA), Setup, Proration Rules, Proration Rules	Define the proration schemes.
Hours Rate	LMS_HOURS_RATE	Compensate Employees, Forecast Compensation (FRA), Setup, Hours Rates, Hours Rate	Define the overtime rates used for simulating the working schedules event. Use this page only for the Salary Forecasting calculation process.

Simulating Headcount Increase

Access the Headcount Increases page.



Headcount Increases page

Number of People Enter the number of people to add.

Headcount Increase Type Select how you want the calculations to consider the increase:

Avg Amnt (average amount): Select Avg Amnt, and these fields appear: **Average Amount, Currency, Frequency.** Enter a free compensation amount, which is multiplied by the number of people selected. Use this type of headcount increase to perform an estimated simulation.

JobCode: Select this and these fields appear: **SetID, Forecasted Job.** Use to add many people with the same job code. The calculation uses the compensation package defined for the specified job code and multiplies it by the number of people selected for the simulation.

Position: Select this and the **Forecasted Positions** field appears. The calculation uses the compensation package defined for the job code associated with the specified position and multiplies it by the number of people selected for the simulation.

Structure Effect — Refer to Technical Details for the definition of the structure effect. To measure the structure effect, assign your headcount increase to a group.

Number of People — Enter the number that represents the headcount increase.

Simulation Parameters — Click to enter additional simulation parameters that the calculation process uses.

Average Amount — When Headcount Increase Type is Avg Amnt, specify the average amount of the salaries for all people added, based on the frequency that is specified. For example, five new people get 5000.00 EUR (1000.00 EUR each) every other week, meaning the frequency is bi-weekly. Enter *1000* in the Average Amount field.

Currency — When Headcount Increase Type is Avg Amnt, select the currency that the calculation process uses.

Frequency — When Headcount Increase Type is Avg Amnt, specify how often the new people are to be paid. During the calculation process, the frequency is converted to match the elementary period type.

For example, the elementary period type is monthly, and you enter five new people who get 1000.00 EUR weekly. The system calculates 5000.00 EUR weekly, then converts it to a monthly frequency using the frequency annualization factor. The monthly figure is 20000.00 EUR. The calculation process adds 20000.00 EUR every month, starting with the triggering period defined for this event.

The values come from the Frequency Table.

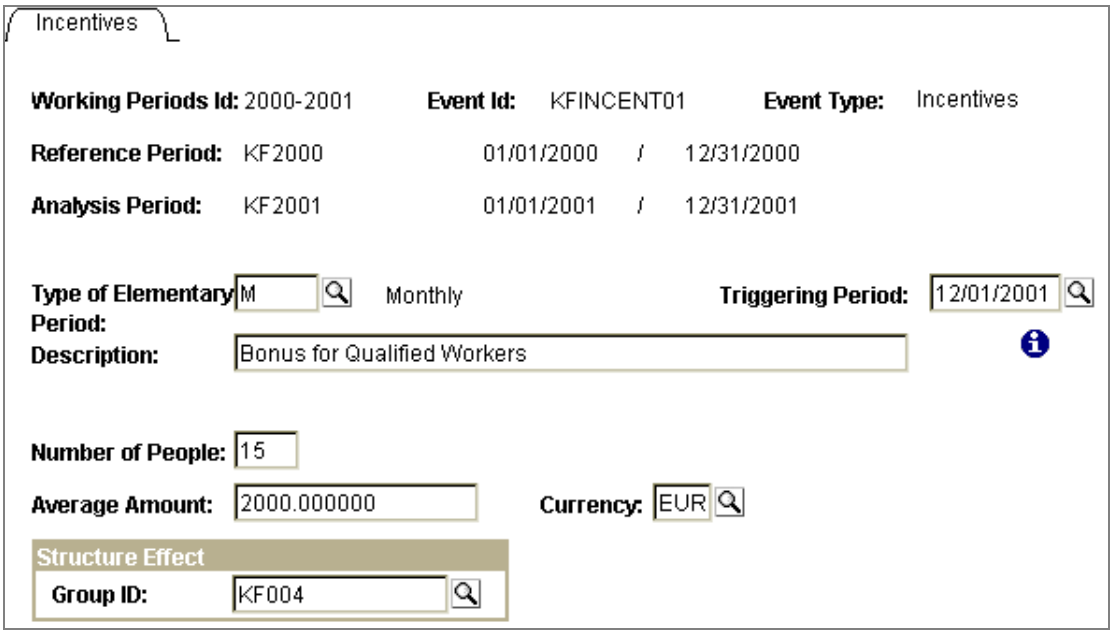
SetID When Headcount Increase Type is JobCode, specify the setID for the job code for the new hires. Values come from the SetID Table.

Forecasted Job When Headcount Increase Type is JobCode, specify a forecasted job for the new hires. Each job code must have its own event. Values come from the Job Code Table.

Forecasted Positions When Headcount Increase Type is Position, specify a forecasted position for the new hires.

Simulating Future Awards

Access the Incentives page.



Incentives page

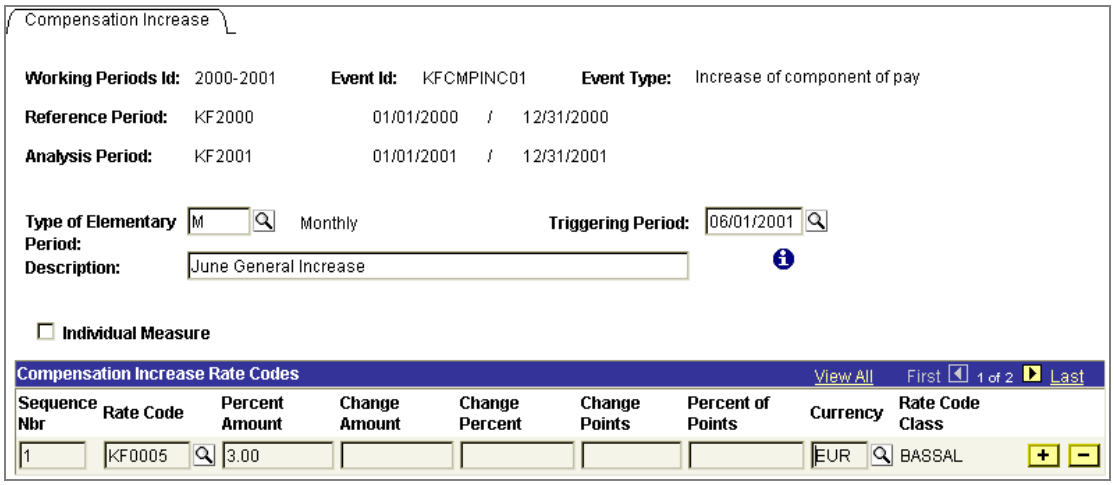
Number of People Enter the number of people who receive a lump sum incentive award.

Average Amount Enter the average amount each person is to receive. For example, if you select *5* for the number of people and 500 for the average amount, the calculation adds 5 times 500.00 EUR, or 2500.00 EUR to the triggering period.

Structure Effect To calculate the structure effect, enter the Group ID to receive this award. Refer to Technical Details for information about the structure effect.

Simulating a Compensation Increase Event

Access the Compensation Increase page.



Compensation Increase page

Individual Measure

Select if the increase is an individual measure. This is related to La Masse Salariale method of analysis. It classifies compensation increases into three different categories: general increases (applies to the overall simulated population); increases by category (a category being a subset of the overall simulated population); and individual measure (when the compensation increase is an increase for an individual).

To simulate general increases, clear this check box.

Refer to Technical Details for definitions of the various types of compensation increases.

Compensation Increase Rate Codes

Define here the rate codes to be increased. All people in a group with a compensation package containing specified compensation rate codes receive the increase that is specified on this page, as of the triggering period of this event.

Select one way to change a person's compensation for a given rate code: **Percent Amount, Change Amount, Change Percent, Change Points, Percent of Points, Currency,** and **Rate Code Class.**

Specify any components of pay and any increases. Depending on the component type, fill in the fields as follows. Fields not related to certain component types are unavailable for selection.

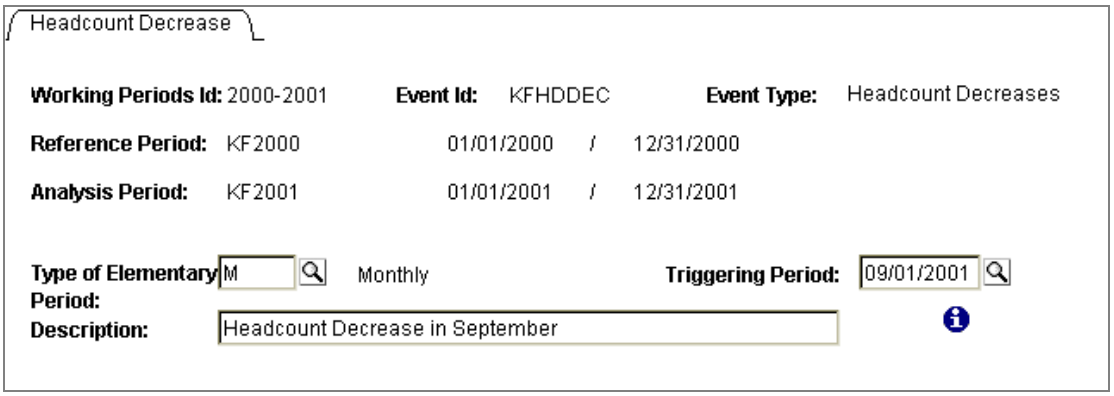
If the component type is flat amount or hourly, enter either the Percent Amount or the Change amount fields.

If the component type is percentage, enter only the Change Percent field.

If the component type is points, enter either the Percent of Points or Change Points fields.

Simulating a Headcount Decrease

Access the Headcount Decrease page.



Headcount Decrease page

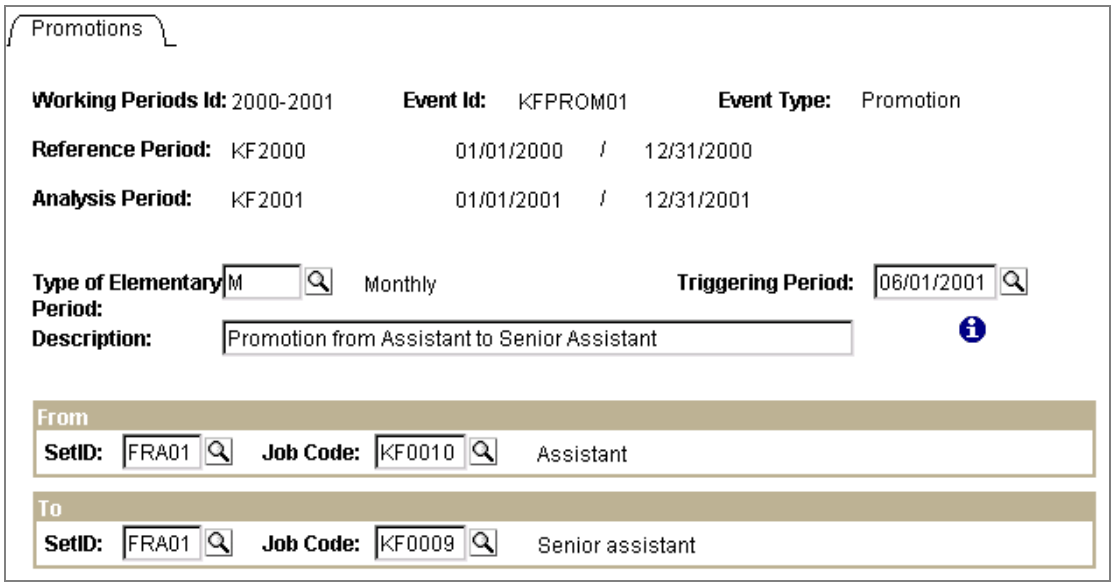
Description Enter a description of the headcount decrease event.

Specify the group to which this event applies on the Scenario Definition page.

For example, if five employees retire as of the date specified by the triggering period, create a group including those five employees. At the scenario level, attach this group to the headcount decrease event.

Simulating a Promotion

Access the Promotions page.



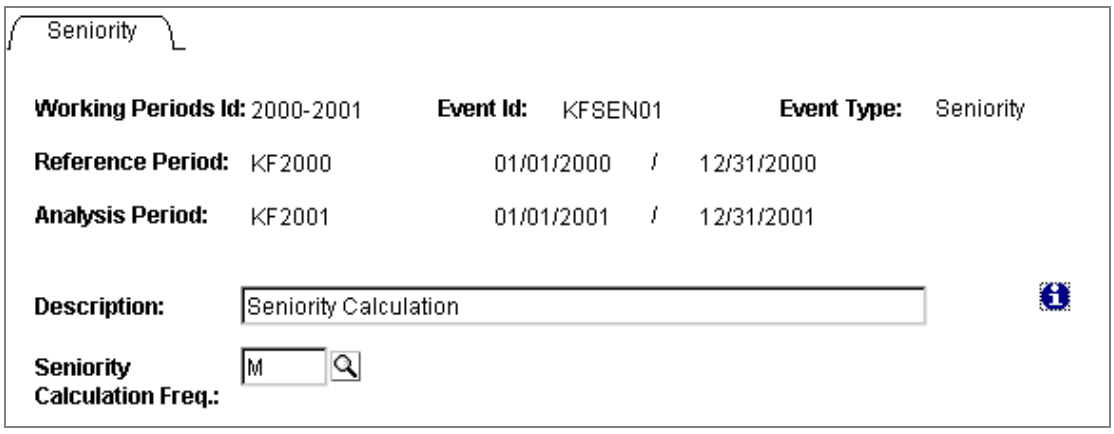
Promotions page

From Enter the SetID and Job Code of a group's current position.

To Enter the SetID and Job Code of a group's promoted position.

Simulating Seniority

Access the Seniority page.



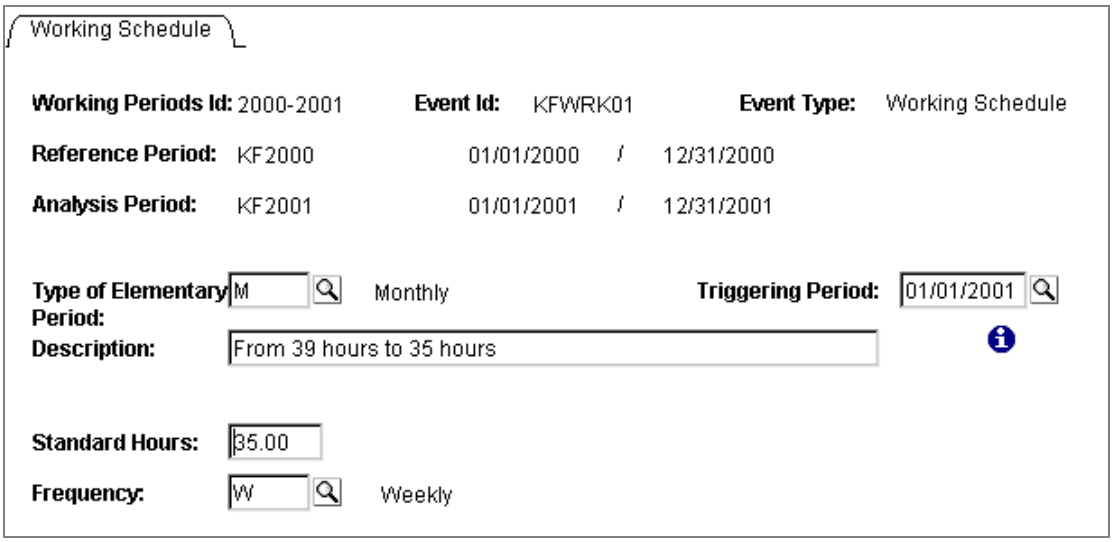
Seniority page

Seniority Calculation Freq (seniority calculation frequency) Enter either *Monthly* or *Semi-monthly* for seniority pay.

At the event level, define the frequency of seniority calculation; that is, how often seniority is evaluated.

Defining a Working Schedule

Access the Working Schedule page.



Working Schedule page

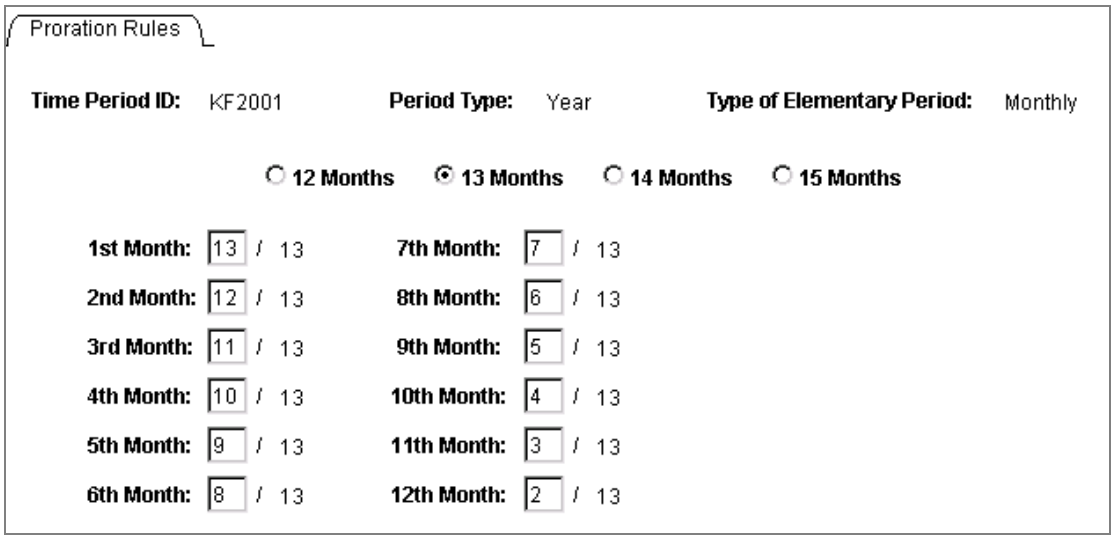
Standard Hours Enter the number of standard hours per frequency period. For example, 35 hours is standard hours for a weekly frequency.

To simulate the impact of a group of people moving from 39 to 35 hours, enter here the target frequency (35 hours a week). The group of people who will change their working schedule is defined at the scenario level.

Frequency Enter the frequency of the standard hours that you select.

Defining Proration Rules

Access the Proration Rules page.



Proration Rules page

Time Period ID The Time Period ID that you entered appears.

Period Type A period type of either *Monthly* or *Semi-Monthly* appears.

Type of Elementary Period Depending on the combination of period type and type of elementary period that you selected, fields appear so that you can rate how to pay per elementary period.

12 Months Select to weigh each month equally.

13 Months Select to weigh one month out of a year twice.

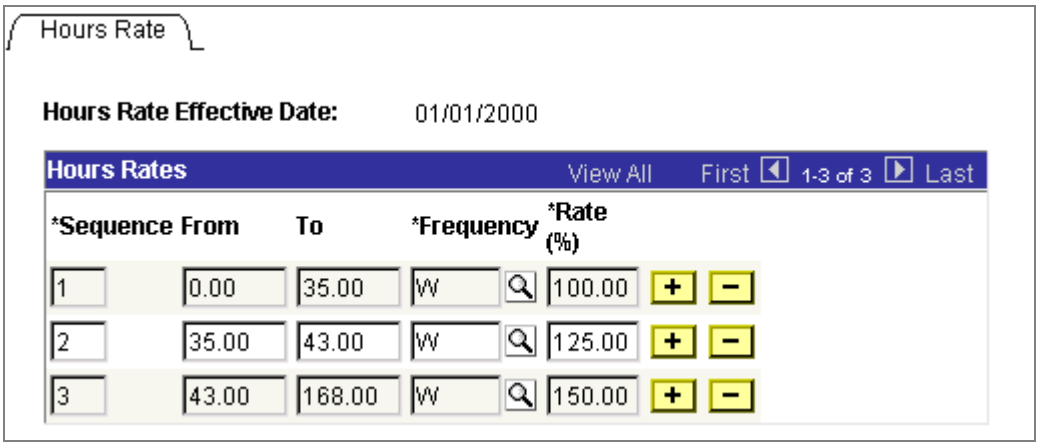
14 Months Select to weigh one month out of a year three times.

15 Months Select to weigh one month out of a year four times.

The system calculates all the ratios, but you can modify them. For instance, if you select 13 Months, you could weight December twice (default calculation) or half-weight June and December. In this case, you overwrite the defaulted ratios.

Defining Hours Rates

Access the Hours Rate page.



Hours Rate page

Hours Rate Effective Date Enter the date these rates are effective.

Sequence These numbers represent the sequence of counting hours. They are automatically generated.

From, To Enter the first and last number in the range of hours. The first sequence must begin with *0*.

Frequency Enter the valid frequency for this range of hours.

Rate(%) Enter the rate in percent for each sequence.

Defining Scenarios

In this section, we discuss how to:

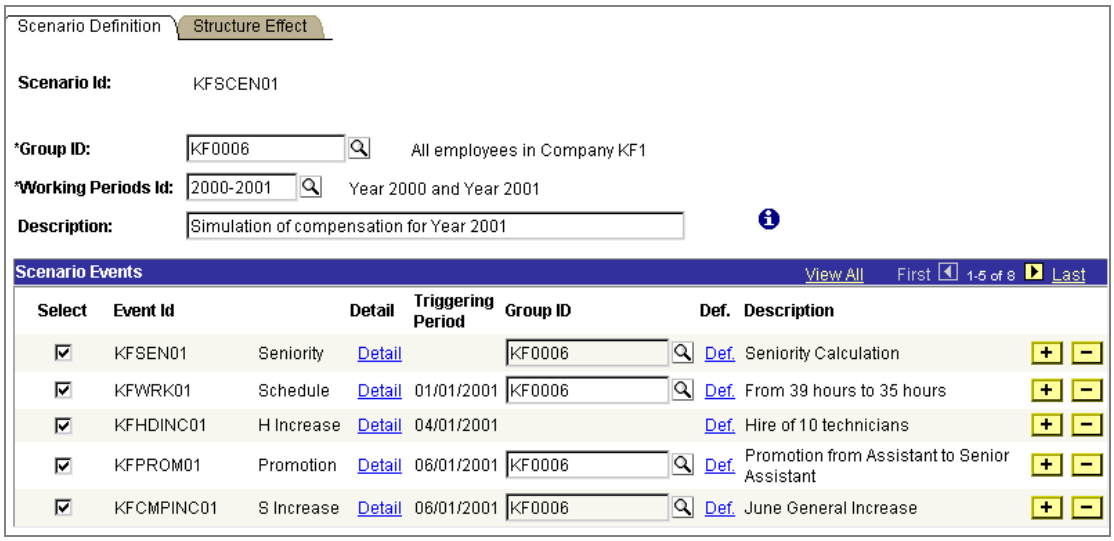
- Associate working periods, events, and employee groups.
- Assess the structure effect.

Pages Used to Define Scenarios

Page Name	*Object Name*	*Navigation*	*Usage*
Scenario Definition	LMS_SCENARIO	Compensate Employees, Forecast Compensation (FRA), Setup, Scenarios, Scenario Definition	Define scenarios. You associate a working periods ID with a group and a set of events.
Structure Effect	LMS_SCENAR_CTG	Compensate Employees, Forecast Compensation (FRA), Setup, Scenarios, Structure Effect	Define the groups used to assess the Structure Effect.

Associating Events with a Scenario

Access the Scenario Definition page.



Scenario Definition page

Group ID Enter for this scenario. The group could be your whole organization. For calculation performance reasons, create a smaller group that represents your organization in compensation terms or create a group from a certain department.

Working Periods Id When you select a working periods ID and press TAB to move out of the field, the system displays all events applicable for that working periods ID.

Note that for certain events, you can limit the population for the event by selecting a Group ID.

Notice that Scenario *KFSCEN01* applies to all the employees in Group *KF0006.*

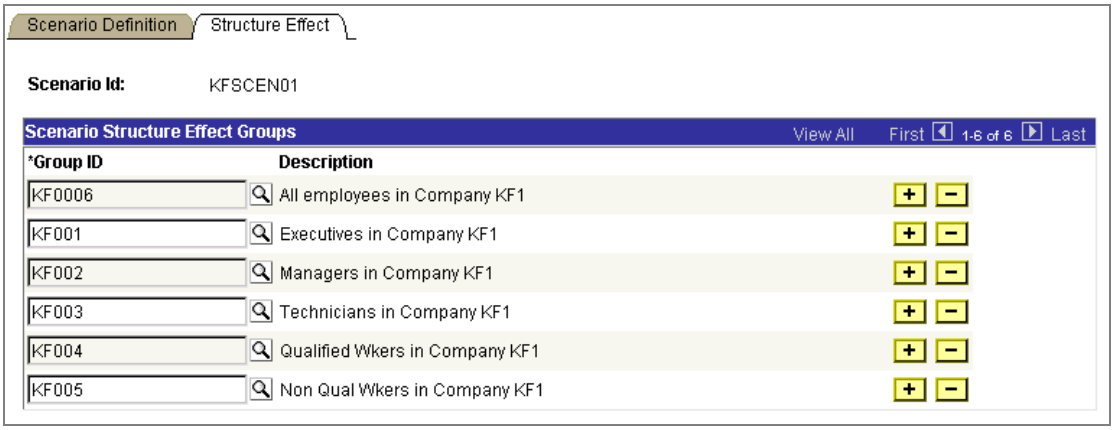
Scenario Events All the events defined for this working period ID appear. Each event is listed by **Event Id, Triggering Period,** and **Description.** To include the events in calculations, select the corresponding check box. Click the **Detail** link to go to the Event Definition page to make adjustments to an event. Click the **Def** link to go to the Group Definition page and modify a group.

Use the Group ID fields to restrict an event to a subset of the group that is defined in the *above* Group ID field. Restrict the population for the following types of events: headcount decrease, promotion, seniority, working schedule. The headcount increase and incentives events don't need a subgroup.

For a compensation increase event, the population to consider is all the employees from the main group (the one defined in the Group ID field at the scenario level) who have, in their compensation package, the compensation rate codes defined in the event.

Assessing the Structure Effect

Access the Structure Effect page.



Structure Effect page

Scenario Structure Effect Groups

Define a subgroup of your overall population, which you defined in the first Group ID field on the Scenario Definition page.

Enter groups forming a subset of your overall population. Ensure that the groups don't overlap and that the sum of their populations equals exactly the overall population.

For example, organization ABC, has several categories of employees: executives, managers, and workers. You want to study how the compensation is changing due to the impact of people moving from one category to another.

The Salary Forecasting module calculates it automatically: Define your overall organization as being all employees in ABC. Then define three groups that to enter in the Scenario Structure Effect page: Group 1 as all executives from ABC, Group 2 as all managers from ABC, Group 3 as all workers from ABC. Groups 1, 2, 3 do not overlap, and their sum equals the overall population of organization ABC.

See Also

Technical Details: Compensation Effects

Technical Details: Categorization of Events

Forecasting Compensation

The calculation process divides both the reference period and the analysis period into sections by considering the elementary period type. For each elementary period, the process extracts from the Human Resources database the base compensation (from the PS_COMPENSATION table) and the variable compensation (from PS_VC_AWARDS) for all the employees in the group specified at the scenario level. It also calculates the average headcount and FTEs for each elementary period to create average compensation amounts.

This calculation process considers all the events defined for future elementary periods and calculates forecasted compensation. Any event defined for past or current elementary periods is not considered because real data exists for those periods of time in the Human Resources database.

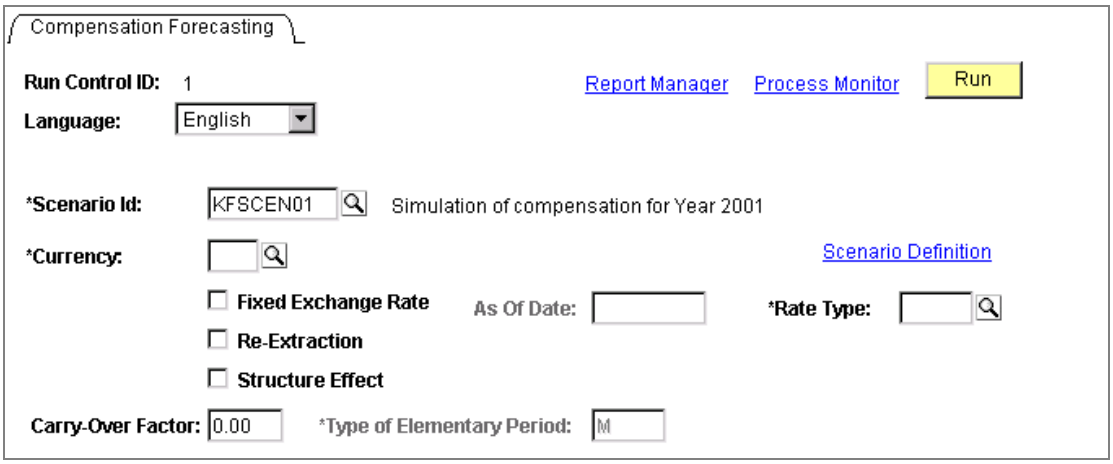
The forecasted compensation amounts are stored in salary forecasting tables so that you can compare the results of several scenarios. Remember that the salary forecasting process does not update core Human Resources transaction tables.

Pages Used to Forecast Compensation

Page Name	*Object Name*	*Navigation*	*Usage*
Compensation Forecasting	RUNCTL_LMS_REPORT	Compensate Employees, Forecast Compensation (FRA), Report, Scenario Comparison, Scenario Comparison Compensate Employees, Forecast Compensation (FRA), Report, Forecasted Compensation, Report Forecasted Compensation	Define a forecasted compensation.

Running a Compensation Simulation

Access the Compensation Forecasting page.



Compensation Forecasting page

Scenario Id Select a scenario ID.

Scenario Definition Click this link to go to the Scenario Definition page. Add or remove events from the scenario and re-launch the calculation.

Fixed Exchange Rate Select for a fixed exchange rate. The As Of Date is available for data entry and represents the effective date for the exchange rate.

For a floating exchange rate, don't select this box. The calculation uses the exchange rate valid at the beginning of each elementary period.

As Of Date Enter the date you want the calculation process to use for the exchange rate. It cannot be greater than the start date of the reference period.

Rate Type Select a rate type.

Re-Extraction Select to retrieve the data when re-running the process. If you don't select this box, the process uses the data from past elementary periods extracted during the last run of the process for this scenario, provided that none of the run control parameters have changed.

Note. Should the run control parameters change from the last execution of the scenario, the system implements all controls automatically and re-extracts the data even if the Re-extraction check box is not selected.

Structure Effect Select to calculate the structure effect.

Carry-Over Factor	Expresses the impact on the analysis period of measures taken during the reference period. For example, compare compensation for year N with compensation for year N + 1. The process calculates the carry-over effect for measures taken during year N + 1 over year N + 2. Assess and enter the carry-over factor of the compensation measures taken during year N, if any.
Type of Elementary Period	Select an elementary period type. If you've defined events for this scenario, then the type appears by default If you haven't selected an event, enter an elementary period type.

See Also

Technical Details: Compensation Effects

Technical Details: Categorization of Events

PeopleTools PeopleBook: Process Scheduler

Purging Scenario History

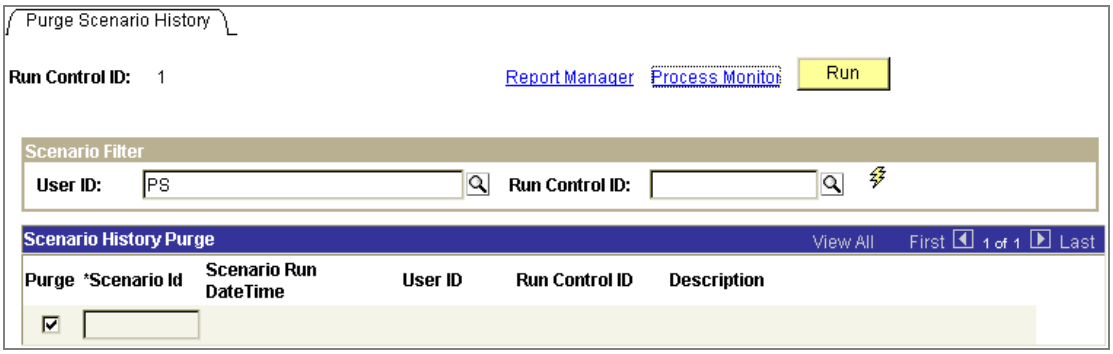
All the results from of the calculation of any scenario are stored in the database. Define several scenarios with different sets of events, run the calculation for all scenarios, and compare the results. Then select the scenario that best mirrors your compensation policy. You may then purge from the database the results of some scenario calculations you aren't going to use. When you purge scenario history, the calculation results are purged but not the scenario definition.

Pages Used to Purge Scenario History

Page Name	*Object Name*	*Navigation*	*Usage*
Purge Scenario History	RUNCTL_LMS_PURGE	Compensate Employees, Forecast Compensation (FRA), Process, Purge Scenario History, Purge Scenario History	Run the Application Engine process HR_LMSPURGE. It deletes the results of all the selected scenario calculation runs.

Deleting Scenario Results

Access the Purge Scenario History page.



Purge Scenario History page

Scenario Filter This group box identifies the User ID and Run Control IDs by which to search. To search all histories, click the lightning button.

Scenario History Purge Chose a scenario to purge by selecting the Purge check box. Note that only the results of the scenario calculation are purged: the scenario definition remains in the database. Information appears in all fields here.

Click Run to run this request. PeopleSoft Process Scheduler runs the Purge Scenario History process at user-defined intervals.

See Also

PeopleTools PeopleBook: Process Scheduler

Viewing Scenario History

Perform forecasting activities in two ways:

- Define different scenario IDs, attach a different set of events to them, and run the calculation process for each scenario ID.
- Define only one scenario ID and change the events associated with this scenario ID each time that you process a new calculation.

Use the Scenario History pages to find which events were used for any scenario calculation. Modify and calculate a scenario repeatedly without recalling the events that were used in each calculation.

Pages Used to View Scenario History

Page Name	Object	Navigation	Usage
Scenario History	LMS_SCENAR_HISTORY	Compensate Employees, Forecast Compensation, Inquire, Scenario History	Inquire about the process history of scenarios.
Scenario History Details	LMS_SCENARHIST_SEC	Click the Information button on the Scenario History inquiry page.	View the run control parameters and events for any calculation.

Technical Details: Compensation Effects

There are several effects in La Masse Salariale method of analysis.

Level Effect

Any compensation measure that increases the level of compensation as of a certain date has a level effect. Any compensation increase of the elements of base pay has a level effect.

Mass Effect

Any compensation increase, either an increase in base compensation or any type of variable compensation, has a mass effect. It impacts the average compensation for the period and population that is considered.

Considering any given period of time and any compensation measure that has a level effect, the sooner in the period the measure is applied, the greater is the mass effect for that measure.

Carry Over Effect

The carry over effect represents the impact on a given period of all the measures taken during the previous period. For any compensation measure that has a level effect, the later this measure is applied in a given time period, the bigger is the carry over effect on the next time period.

Average Compensation for Employees in Place (ACEP)

The overall compensation for an organization could change between two consecutive periods for several reasons:

- Compensation increases given to a sub-group or to the entire organization.
- Seniority changes due to the overall aging of the population.
- Hires and departures within the organization.
- Moves within the organization that trigger changes in compensation, such as promotions.

ACEP is the average compensation for the subset of people within the organization during two consecutive time periods.

Headcount Effect

The headcount effect is the variance of the headcount multiplied by the variance of the average compensation.

Structure Effect

The structure effect is the variance in the overall compensation due to internal moves within the organization.

Noria Effect

The Noria effect is defined as the impact of changes in compensation due to hiring and departures. Often the salaries of the newly hired are below those of workers who have been at the same job longer. The Noria effect tracks the differences.

Overall Variance of Compensation Between Two Time Periods

The calculation is displayed as follows:

```
ACEP variance + Headcount effect + Structure Effect + Noria Effect
```

All variances and effects are expressed in percentages (refer to Report LMS001).

Technical Details: Categorization of Events

All events are classified in predefined categories by the Forecast Compensation module calculation process. Those categories are the ones commonly used for La Masse Salariale analysis. The category codes and descriptions are delivered as system data.

This table displays La Masse Salariale categorization and the corresponding category codes that are used by the calculation process to map the events defined at the scenario level with the categories.

Category	*Category Code*
General Increases	C20
General Increases given as a percentage	C21
General Increases given as a Amount or Points changes	C22
Measures by Category	C30
Bonus	C40
Regular Bonus	C41
Exceptional Bonus	C42
Individual Measures	C50

Category	*Category Code*
Seniority	C51
Shift-Technicality	C52
Activity	C53

The following matrix displays which events impact which categories.

Event	*Category/ Rate Code Class*	*C 20*	*C 21*	*C 22*	*C 30*	*C 40*	*C 41*	*C 42*	*C 50*	*C 51*	*C 52*	*C 53*
Leave		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Promotion	Base Pay								*		*	
	Reg Bonus					*	*					
	Seniority Bonus								*	*		
Salary Increase	Base Pay	*	*	*	*				*		*	
	Reg Bonus					*	*					
	Seniority Bonus								*	*		
Seniority	Seniority Bonus								*	*		
Working Schedule	Base Pay								*			*
	Reg Bonus					*	*					
	Seniority Bonus								*	*		
Entry		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Incentive	N/A					*		*				

CHAPTER 10

Viewing Summary Salary Data

In this chapter, we discuss summary salary data and how to:

- View compensation history.
- View employee ranking.
- View job evaluations.

Viewing Compensation History

In this section, we discuss compensation history and how to:

- View compensation history.
- View compensation rate codes.

Understanding 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.

It shows the number of months since the employee's last increase, as well as 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.

Pages Used to View Compensation History

Page Name	*Object Name*	*Navigation*	*Usage*
Compensation Summary	COMP_SUMMARY	Administer Workforce, Plan Salaries (GBL), Inquire, Compensation History, Compensation History	View the history of all pay rate changes the employee has received to date. This is a useful reference when planning new increases.

Page Name	Object Name	Navigation	Usage
Comp Rate Code	COMP_RATECD5_SEC	Click the Details link on the Compensation History: Amounts page.	View additional information about the compensation rate code from the Comp Rate Code Table.

Compensation History Alternate Navigations

Administer Workforce, Administer Workforce (USF), Inquire, Comp Summary, Compensation Summary

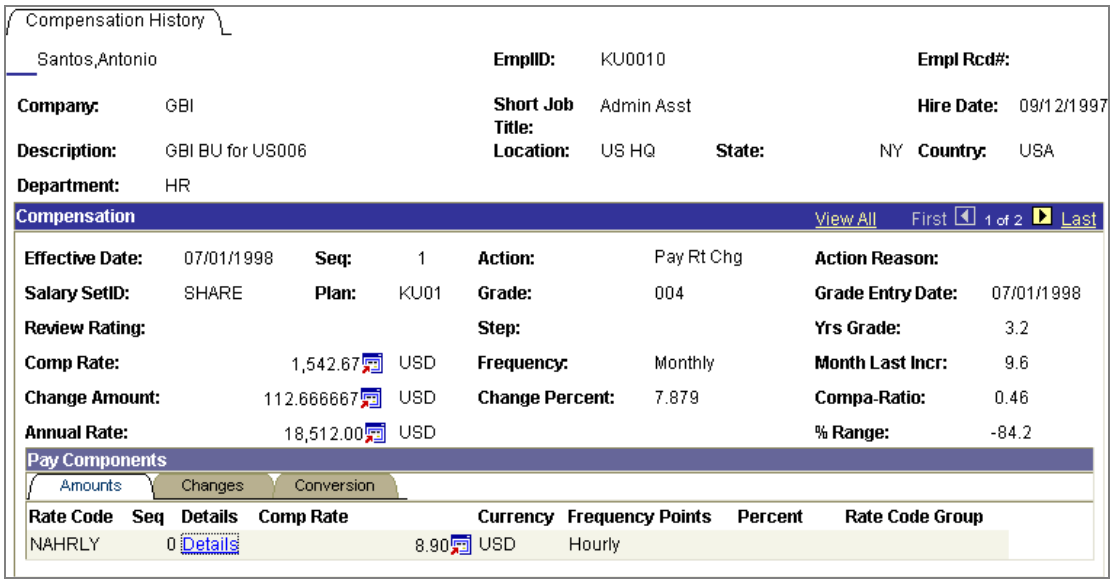
Develop Workforce, Plan Careers, Inquire, Compensation Summary, Compensation Summary

Develop Workforce, Plan Successions (GBL), Inquire, Compensation Summary, Compensation Summary

Develop Workforce, Plan Successions (USF), Inquire, Compensation Summary, Compensation Summary

Viewing a Compensation Summary

Access the Compensation Summary page.



Compensation History page

For each salary change the system displays the following data from the employee's job and compensation records:

 # Mos (number of months) The number of months since the last increase.

Seq (sequence) The sequence number of the salary change action.

Action and **Reason**	The action and reason that resulted in a salary change.
Comp Rate (compensation rate) and **Frequency**	The employee's compensation rate as of this effective date, sequence, action, and reason along with the frequency with which it is paid.
Annual Rate	The employee's new annual rate as of this effective date, sequence, action, and reason.
Rating	The employee's review rating.
Increase Amount	The amount of the employee's increase for this effective date, sequence, action, and reason.
Increase Percent	The percent increase for this effective date, sequence, action, and reason.
Plan, Grade, and **Step**	The employee's salary administration plan, salary grade, and salary step for this effective date, sequence, action, and reason.
Entry Date	The date the employee entered the step.
Compa Rto (compa-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.
PIR (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.

Pay Components

The Amounts, Changes, and Conversions tabs display detailed pay information.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," Comp Rate Code Table - Comp Rate Code Table page

"Administering Salary Plans, Grades and Steps," Viewing Compa-Ratios and Viewing Range Calculations

Viewing Employee Ranking

In this section, we discuss viewing employee ranking and how to:

- View employee ranking in terms of compensation.
- View the details of employee compensation packages.
- View unidentified employees ranking in terms of compensation.

Understanding 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. 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.

Pages Used to View Employee Ranking

Page Name	*Object Name*	*Navigation*	*Usage*
Employee Ranking by Job Code	JOB_RANKING	Administer Workforce, Plan Salaries (GBL), Inquire, Employee Ranking by Job Code, Employee Ranking by Job Code Administer Workforce, Manage Performance (USF), Inquire, Employee Ranking by Job Code Develop Workforce, Manage Positions (USF), Inquire, Employee Ranking by Job Code, Employee Ranking by Job Code	View how employees rank in terms of compensation within a job code.
Salary Components	COMP_EMPL_RANK_SEC	Click the Component Details button on the Employee Ranking by Job Code page.	View the details of the employee's compensation package associated with the current job data row.
Comp Rate Code (compensation rate code)	COMP_RATECD5_SEC	Click the Details button on the Salary Components page.	Review detail information on a specific rate code.
Ranking by Job Code - No Name	JOB_RANKING_NO_EE	Administer Workforce, Plan Salaries (GBL), Inquire, Ranking by Job Code - No Name, Ranking by Job Code - No Name Administer Workforce, Manage Performance (USF), Inquire, Ranking by Job Code - No Name	View how employees rank in terms of compensation within a job code. To protect privacy, employee identification does not appear on the page.

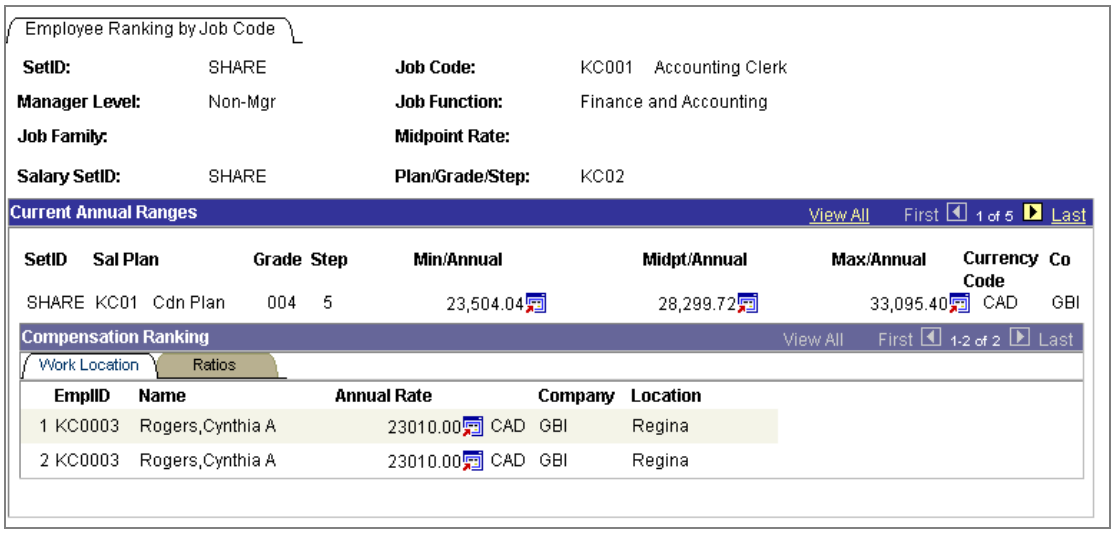
Note. The Manage Performance business process in PeopleSoft Human Resources also uses the Employee Ranking by Job Code and Ranking by Job Code - No Name pages.

See Also

PeopleSoft Human Resources PeopleBook: Manage Performance, "Managing Performance," Viewing Employee Ranking and Position Evaluation by Grade Level

Viewing Employee Ranking in Terms of Compensation

Access the Employee Ranking by Job Code page.



Employee Ranking by Job Code page

Min/Annual (minimum annual) The minimum annual salary in the grade.

Midpt/Annual (midpoint annual) The midpoint annual salary in the grade.

Max/Annual (maximum annual) The maximum annual salary in the grade.

Compensation Ranking

Employees are listed from the highest compensation to the lowest.

Ratios Tab

Compa-Ratio Where employees' salaries lie in relation to the range midpoint for their salary grade.

%Range Where employees' salaries fall within the range for their salary grade.

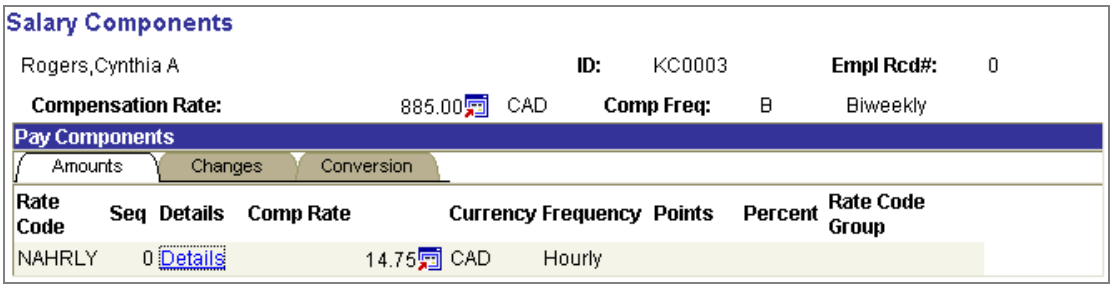
 Click the Component Details button to access the Salary Components page, where you can view employees' compensation details by pay component.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs," Classifying Jobs

Viewing the Details of Employee Compensation Packages.

Access the Salary Components page



Salary Components page

For each salary change, this page displays pay component details from the employee's job and compensation records.

Common Page Information

Compensation Rate and **Comp Freq** (compensation frequency) — The employee's annual compensation rate and 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

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 rate code sequence number.

Details — Click to view the details of the **Rate Code** definition and to access the Comp Rate Code page where more information about the rate code is displayed.

Comp Rate (compensation rate), **Currency,** and **Frequency** — The compensation rate, currency, and frequency associated with the rate code.

Points — If the rate code type is ***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

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 and **Change Percent** — If the rate code type is ***Points or Percent,*** the system displays the change points and the change percent associated with the rate code.

Conversion Tab

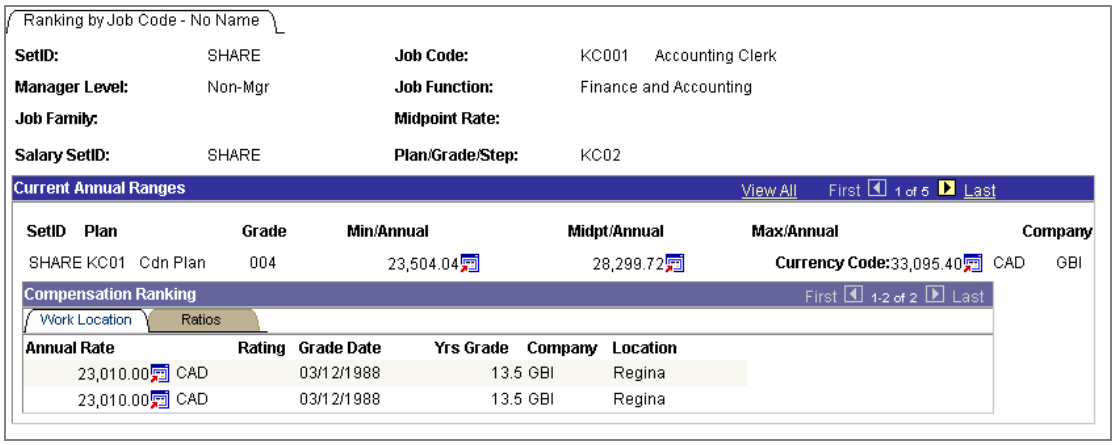
Default Without Override

Apply FTE — This check box is selected if you elected to apply FTE calculations to frequency calculations of this rate code.

Converted Comp Rate (converted compensation rate) — The new compensation rate for the rate code converted to the employee's compensation frequency and currency.

Viewing Employees' Compensation Rank With Privacy Protected

Access the Ranking by Job Code - No Name page.



Ranking by Job Code - No Name page

All the fields on this page are identical to fields on the Employee Rank by Job Code page, except for 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.

See Also

Viewing Employee Ranking

Viewing Job Evaluations

In this section we discuss how to compare job evaluation criteria among job codes.

Understanding 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.

Pages Used to View Job Evaluations by Grade

Page Name	*Object Name*	*Navigation*	*Usage*
Job Evaluations by Grade	JOB_EVALUATIONS	Administer Workforce, Plan Salaries (GBL), Inquire, Job Evaluations by Grade, Job Evaluations by Grade Administer Workforce, Manage Performance (USF), Inquire, Position Evaluations by Grade, Job Evaluations by Grade Develop Workforce, Manage Positions (USF), Inquire, Job Evaluations by Grade, Job Evaluations by Grade	Compare job evaluation criteria among job codes within a salary plan and grade.

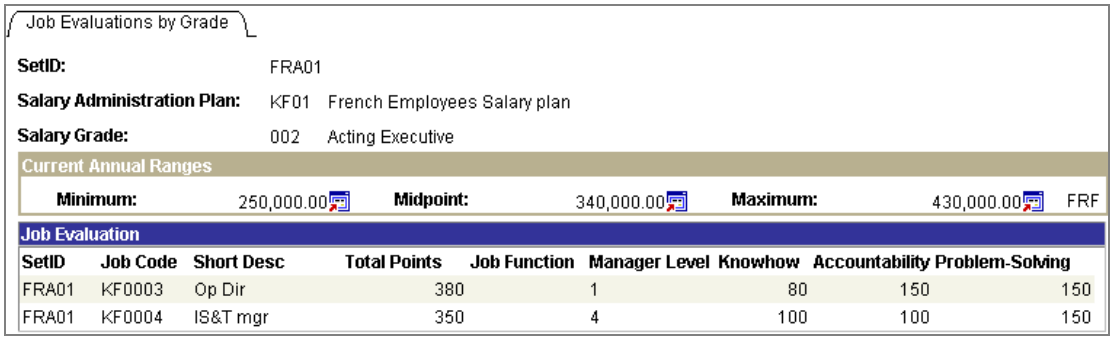
Note. The Manage Performance business process in PeopleSoft Human Resources also uses the Job Evaluation by Grade page.

See Also

PeopleSoft Human Resources PeopleBook: Manage Performance, "Managing Performance," Viewing Employee Ranking and Position Evaluation by Grade Level

Comparing Job Evaluation Criteria

Access the Job Evaluations by Grade page.


Job Evaluations by Grade

SetID: FRA01

Salary Administration Plan: KF01 French Employees Salary plan

Salary Grade: 002 Acting Executive

Current Annual Ranges

Minimum: 250,000.00 Midpoint: 340,000.00 Maximum: 430,000.00 FRF

Job Evaluation

SetID	Job Code	Short Desc	Total Points	Job Function	Manager Level	Knowhow	Accountability	Problem-Solving
FRA01	KF0003	Op Dir	380		1	80	150	150
FRA01	KF0004	IS&T mgr	350		4	100	100	150

Job Evaluations by Grade page

Current Annual Ranges

The system displays the following information about the salary grade, as you defined it on the Salary Grade Table page:

Minimum, Midpoint, and **Maximum** — Minimum, midpoint, and maximum annual compensation in the grade.

Job Evaluation

Total Points, Job Function, and **Manager Level** — Enter the corresponding values associated with this job code.

Knowhow, Accountability, and **Problem-Solving** — Displays the number of points associated with this criterion for this job code.

See Also

"Setting Up Salary Plans, Grades and Steps," Defining and Viewing Salary Grades and Steps

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