

PeopleSoft®

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PeopleSoft 8.8  
Human Resources PeopleBook:  
Plan Salaries

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December 2002

PeopleSoft 8.8  
Human Resources PeopleBook:  
Plan Salaries  
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# About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

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## PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

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## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

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

### **See Also**

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*

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## **Related Documentation**

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

### **Obtaining Documentation Updates**

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

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**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

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### **See Also**

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

### **Ordering Printed Documentation**

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

## Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

## Telephone

Contact CPI at 800 888 3559.

## Email

Send email to CPI at [psoftpress@cc.larwood.com](mailto:psoftpress@cc.larwood.com).

## See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

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# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

## Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  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 <i>O</i> .
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.

Typographical Convention or Visual Cue	Description
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&amp;G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

---

**Note.** Example of a note.

---

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

---

**Important!** Example of an important note.

---

## Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

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**Warning!** Example of a warning.

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## Comments and Suggestions

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

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

Or send email comments to [doc@peoplesoft.com](mailto:doc@peoplesoft.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

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## Common Elements in These PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	An ID 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.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, 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.
<b>Once, Always, and Don't Run</b>	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.  Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

**Report Manager**

Click to access 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).

**Process Monitor**

Click to access the Process List page, where you can view the status of submitted process requests.

**Run**

Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

**Request ID**

An ID that represents a set of selection criteria for a report or process.

**User ID**

An ID that represents the person who generates a transaction.

**SetID**

An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

**Short Description**

Enter up to 15 characters of text.

**See Also**

*Using PeopleSoft Applications*

*PeopleSoft Process Scheduler*



# PeopleSoft Human Resources Plan Salaries Preface

This preface discusses:

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

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

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## PeopleSoft Application Fundamentals

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

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

### See Also

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## PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> <li>• How to use the Application Fundamentals book.</li> <li>• How PeopleBooks are structured.</li> <li>• Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.</li> </ul>
Getting Started With...	<p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> <li>• The business processes documented within the book.</li> <li>• Integrations between the product and other products.</li> <li>• A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.</li> </ul>
Understanding...	<p>This is an introductory chapter that broadly explains the product and the functionality within the product.</p>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality.</p> <p><b>Note.</b> There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.</p>

Chapters	Description
Business Process	<p>This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality.</p> <p><b>Note.</b> There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.</p>
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.



# CHAPTER 1

## Getting Started With PeopleSoft Human Resources Plan Salaries

This chapter provides an overview of PeopleSoft Human Resources Plan Salaries business processes and discusses:

- PeopleSoft Human Resources Plan Salaries integrations.
- PeopleSoft Human Resources Plan Salaries implementation tasks.

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### Plan Salaries Business Processes

The following are the processes for PeopleSoft Human Resources Plan Salaries:

- Salary administration plans.
- Budgeting and planning salary increases.
- (FRA) Forecasting salaries for France.
- (JPN) Updating salaries for Japan.
- Processing mass salary increases.
- Reviewing employee performance history.
- Assigning and approving merit increases.
- Viewing and reporting plan salary data.

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

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### Implementing PeopleSoft Human Resources Plan Salaries

The Plan Salaries table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Plan Salaries application tables.
- Additional Plan Salaries application tables.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

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**Important!** The order in which you set up tables required to implement PeopleSoft Human Resources Plan Salaries may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Plan Salaries core application, then several tables specific to the country or industry you operate in, followed by additional Plan Salaries core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

---

## Setting Up PeopleSoft HRMS Fundamental Tables

The Plan Salaries business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Plan Salaries business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"
2. Set up PeopleSoft Human Resources fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"

## Setting Up Core PeopleSoft Human Resources Plan Salaries Tables

The steps discussed in this section suggest an order in which you define the information in your core Plan Salaries tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Salary administration plans.
- Budgeting and planning salary increases.
- Processing mass salary increases.
- Reviewing employee performance history.
- Assigning and approving merit increases.

Step	Reference
1. Defining salary increase guidelines.	<a href="#">Chapter 3, "Setting Up Plan Salaries," Setting Up Salary Plans, Grades, and Steps, page 11</a>
2. Define salary plans.	<a href="#">Chapter 3, "Setting Up Plan Salaries," Setting Up Salary Plans, Grades, and Steps, page 11</a>
3. Define salary grades and steps.	<a href="#">Chapter 3, "Setting Up Plan Salaries," Setting Up Salary Plans, Grades, and Steps, page 11</a>
4. Associate salary grades and steps.	<a href="#">Chapter 3, "Setting Up Plan Salaries," Associating Salary Components With Salary Steps, page 19</a>

Step	Reference
5. Define budget IDs.	<a href="#">Chapter 3, “Setting Up Plan Salaries,” Setting Up Salary Increase Budgeting and Planning, page 27</a>
6. Define merit increase IDs.	<a href="#">Chapter 7, “Defining, Assigning, and Approving Merit Increases,” Defining Up Merit Increase IDs, page 83</a>
7. (Opt) Define merit groups.	<a href="#">Chapter 7, “Defining, Assigning, and Approving Merit Increases,” Defining Merit Groups, page 86</a>

## (FRA) Setting Up Additional PeopleSoft Human Resources Plan Salaries Tables

These steps define information in additional Plan Salaries tables. The information that you define in your core tables lays the foundation for this Plan Salaries-specific setup.

Setting up these additional tables prepares your system to support the salary planning for France (La Masse Salariale) business process and related tasks.

Step	Reference
1. (FRA) Define compensation forecast periods for France.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Defining Periods, page 122</a>
2. (FRA) Define headcount increase events for France.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
3. (FRA) Define simulation parameters.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
4. (FRA) Define group incentives and awards.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
5. (FRA) Define compensation increase events.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
6. (FRA) Define headcount decrease events.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
7. (FRA) Define group promotions simulations.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
8. (FRA) Define seniority events.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
9. (FRA) Define work weeks for calculations.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
10. (FRA) Define proration rules.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
11. (FRA) Define overtime rates.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Setting Up Events, page 123</a>
12. (FRA) Define scenarios and groups for the Structure Effect.	<a href="#">Chapter 10, “(FRA) Forecasting Salaries for France,” Defining Scenarios, page 133</a>





## CHAPTER 2

# Understanding PeopleSoft Human Resources Plan Salaries

This chapter provides an overview of PeopleSoft Human Resources Plan Salaries and discusses:

- Business processes supported by PeopleSoft Human Resources Plan Salaries.
- PeopleSoft Human Resources Plan Salaries integrations.
- Designing PeopleSoft Human Resources Plan Salaries.

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## PeopleSoft Human Resources Plan Salaries

PeopleSoft Human Resources Plan Salaries enables you to set up your basic salary planning system architecture and manually apply salary data to employee records.

### Prerequisites

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 8.8 Application Fundamentals for HRMS PeopleBook*, “Using PeopleSoft Workflow”

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Installing PeopleSoft HRMS”

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce”

## Common Elements Used in This Book

<b>Salary Administration Plan</b>	A plan of salary defaults, grades, and step components.
<b>Salary Increase Plan</b>	A plan for increasing the salaries of individual employees in a group. This plan is based on a group salary increase budget.
<b>Salary Plan</b>	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.

---

## PeopleSoft Human Resources Plan Salaries Business Processes

PeopleSoft Human Resources Plan Salaries supports the following business processes.

### 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.

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.

### 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.

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.

---

**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.

---

### **See Also**

[Chapter 3, "Setting Up Plan Salaries," page 11](#)

[Chapter 6, "Budgeting and Planning Salary Increases," page 53](#)

## **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**

[Chapter 6, "Budgeting and Planning Salary Increases," page 53](#)

## **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**

[Chapter 11, "Viewing and Reporting Summary Salary Data," page 145](#)

---

## PeopleSoft Human Resources Plan Salaries Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

PeopleSoft Human Resources Plan Salaries integrates with PeopleSoft Payroll for North America (sends data).

We cover integration considerations in this PeopleBook.

### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Understanding Enterprise Integration Points in HRMS”

---

## Designing Your Salary Planning Program

The core of PeopleSoft Human Resources Plan Salaries comprises four main phases of operation:

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

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

### (FRA) Designing Your Salary Forecasting Process

For organizations in France, Plan Salaries functionality allows for additional salary forecasting capabilities by defining the following parameters:

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

- Overtime rates
- Scenarios and groups

## Setting Up Support Tables and Salary Plans

When implementing Human Resources: Plan Salaries you will set up the following tables. These tables are the building blocks for salary plans.

Table	Definition
(Optional) Salary Increase Matrix	Set up this table if you use matrix guidelines in your organization to plan salary increases. <b>Note.</b> The JPN Salary Increase Matrix Table page is identical to the Salary Increase Matrix Table page, but is specific to Japanese users.
Salary Plan	Defines each salary plan with a unique ID.
Salary Grade	Assigns salary grades to the salary plan.
(Optional) Categorization Defaults	Defines labor agreement categorization if your organization associates salary plans to labor agreements.
Salary Step Components	Associates salary steps and pay components to each salary grade.
(JPN) Grade Advance Criteria	Define criteria for processing grade advances for Japan.
(USF) Salary Grade	For United States Federal users, defines additional salary grade criteria.
(USF) Salary Steps	For United States Federal users, defines additional salary step criteria.
Salary Plan Default Values	Defines salary increase plan defaults.
Sal Plan Group Default Values	Defines default values for employee groups.

### See Also

[Chapter 3, “Setting Up Plan Salaries,” page 11](#)

## **Administering Salary Plans**

After completing the salary plan setup process, you associate salary plans to employee job records on the Job Data – Salary Plan page. There must be employee job data in the system before you can apply salary plans to employee job records.

## CHAPTER 3

# Setting Up Plan Salaries

Before you can use the Plan Salaries business process you need to set up the control tables that support it. We will outline the necessary setup steps and tables to support the administration of:

- Salary plans.
- Budgets and planned salary increases.

---

## Setting Up Salary Plans, Grades, and Steps

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. 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. (Optional) Set up salary increase matrix guidelines on the Salary Increase Matrix Table page.  
Set up this table if you use matrix guidelines in your organization to plan salary increases.

---

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

---

2. Define each salary plan with a unique ID on the Salary Plan Table page.  
German users enter tariff information for the salary plan.
3. Assign a series of salary grades to the salary plan on the Salary Grade Table page.
4. (Optional) Set up labor agreement categorization defaults on the Categorization Defaults page.
5. (Optional) For each salary grade, set up salary steps with pay components and their compensation values and currency on the Salary Step Components page.

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

### See Also

[Chapter 4, “Administering Salary Plans, Grades, and Steps,” \(JPN\) Setting Grade Advance Criteria, page 33](#)

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

Page Name	Object Name	Navigation	Usage
Salary Increase Matrix Table	SALARY_MATRIX_TBL	Compensation, Salary Planning, Salary Plan Administration, Define Salary Increase Matrix	Establish the minimum and maximum percentage increases permitted for each review rating by position in range.
Salary Plan Table	SALARY_PLAN_TABLE	Compensation, Salary Planning, Salary Plan Administration, Define Salary Plan	Define the common characteristics of your salary plan. German users can use this page to associate a German tariff and tariff area with the salary plan.
Salary Grade Table	SALARY_GRADE_TBL1	<ul style="list-style-type: none"> <li>• Compensation, Salary Planning, Salary Plan Administration, Define Salary Grades</li> <li>• Compensation, Salary Planning, Salary Plan Administration, Define Salary Grades USF</li> </ul>	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	Compensation, Salary Planning, Salary Plan Administration, Define Salary Grades	Associate the salary grade with labor agreement categories and subcategories.  Before using this page, define labor agreements, categories, and subcategories on the Employee Categorization page.
Salary Step Components	SALARY_GRADE_T3GBL	Compensation, Salary Planning, Salary Plan Administration, Define Salary Grades	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 Details on the Salary Step Components page.	View details of the rate code as defined on the Comp Rate Code table.
Grade Advance Criteria	SAL_GRD_REV_JPN	Compensation, Salary Planning, Salary Plan Administration, Define Salary Grades	Specify grade advance criteria used in the <i>Shohkaku</i> (Grade Advance) candidate process.



Page Name	Object Name	Navigation	Usage
Salary Structure Summary	SALARY_STRUCTURE	Compensation, Salary Planning, Review Salary Information, Salary Structure Summary	View a summary of the salary structure online or print reports that summarize your grade structure or grade and step structure for each plan. This information is helpful when you plan salary increases.
(USF) Salary Step Table	GVT_SAL_GRADE_TBL2	Compensation, Salary Planning, Salary Plan Administration, Define Salary Grades USF	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.

**See Also**

Chapter 9, “(JPN) Updating Salaries for Japan,” Updating Salaries by Percentages, page 109

## Defining a Salary Increase Matrix

Access the Salary Increase Matrix Table page.

**Salary Increase Matrix Table**

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

---

**Rating Scale** Find | View All    First ◀ 1 of 1 ▶ Last

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

\*Description: Exempt Salary Ranges      Short Description: Exempt

Rating Model: KC01   Canadian Rating Model

---

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

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

Salary Increase Matrix Table page

### Rating Scale

**Rating Model**

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

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, “Setting Up Competencies and Accomplishments,” Setting Up Rating Models.

## 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 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.

---

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

---

## Defining Salary Plan Characteristics

Access the Salary Plan Table page.

Salary Plan Table

---

**SetID:** SHARE      **Salary Administration Plan:** K0G1      [Business Units that use this Setid](#)

Salary Plan

Find | View All    First ◀ 1 of 1 ▶ Last
  

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

**\*Description:** Global SP 1 - Auto Calc Prem

**Short Description:** SP 1 - ACP

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

**\*Currency Code:** USD  US Dollar

**Default Salary Matrix Code:**

**Default Rating Model:**

**Company:** GBI  Global Business Institute

Frequency Defaults	Auto Calculated Premium
<b>Hourly:</b> H <input type="button" value="🔍"/> Hourly	<input checked="" type="checkbox"/> <b>Auto Calculated Premium</b>
<b>Daily:</b> D <input type="button" value="🔍"/> Daily	<b>Absorbing Premium:</b> K0GRCA <input type="button" value="🔍"/> Absorbing
<b>Monthly:</b> M <input type="button" value="🔍"/> Monthly	<b>Non-Absorbing Premium:</b> <input type="text"/> <input type="button" value="🔍"/>

Salary Plan Table page, 1 of 2

**Attached File**

**URL Identifier:**

**File Name:**

**Long Description:**

**Added By:**

**Date Added:**

▼ **Germany**

**Tariff:**

**Tariff Area:**

▼ **Japan**

**Salary Plan Explanation:**

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 Rating Model

Once you select a default salary matrix code, the system populates the Default Rating Model if you have linked it to the salary matrix code on the Salary Matrix Table. You cannot change it here if it is linked to the salary matrix code unless the system has been installed for Japan.

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.

## Attached File

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

**File Name** Displays the file name.

 Add

Click 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.

## (DEU) Germany

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

## (USF) US Federal

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



The screenshot shows a web interface for the 'Salary Grade Table' page. At the top, there is a dropdown menu with a red circle icon and the text 'Japan'. Below this, there is a large text area with the label 'Salary Grade Explanation:' on the left. The text area is empty and has a vertical scrollbar on the right side.

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.

### Job Profile ID

Select a job profile ID.

### 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.

### Rating Model

If you selected a default salary matrix code on the Salary Plan Table setup page, the system displays the Rating Model that is tied to the salary matrix.

### Currency Code

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

### Range Spread

The system calculates the range spread percentage by dividing the salary maximum amount by the minimum amount and 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, Hourly, and Biweekly

Enter the annual, monthly, daily, hourly, or biweekly 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 8.8 Application Fundamentals for HRMS PeopleBook*, “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 8.8 Human Resources PeopleBook: Manage Labor Relations*, “Setting Up Labor Relations Data,” Defining Labor Agreements, Labor Agreement Categories, and Employee Classes

**Associating Salary Components With Salary Steps**

Access the Salary Step Components page.

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

**SetID:** SHARE      **Salary Administration Plan:** KC01 CDN Salary Administration Plan  
**Salary Grade:** 001      **Standard Hours:** 40.00

**Salary Grade** Find | View All First 1 of 1 Last  
**Effective Date:** 01/01/1997      **Status:** Active + -  
**Description:** Standard Pay Grade 1      **Increment Type:** Date Based

**Salary Step** Find | View All First 1 of 7 Last  
**\*Step:** 1      **Step Description:** + -  
**Currency:** CAD      **Months to Next Step Increment:** 12

**Salary Components**

*Rate Code	Seg	Details	Comp Rate	Currency	*Frequency	Percent	Rate Code Group	Points		
	0	Details		CAD						+ -

**Totals**

Hourly Rate	Daily Rate	Monthly Rate	Annual Rate
7.280000	58.240	1,261.87	15,142.40

▼ Australia

**Higher Education**

**Job Classification:** [ ]

**Australian Public Service**

**Minimum Classification:** [ ]      **Maximum Classification:** [ ]

Salary Step Components page

## Salary Grade

### Incr Type (increment type)

If you plan to run a process that automatically moves an employee to the next salary step, select 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.



## 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.

## 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 8.8 Payroll for North America PeopleBook*, “Setting Up the Payroll Process,” Establishing Special Accumulator Codes

Chapter 3, “Setting Up Plan Salaries,” Setting Up Salary Plans, Grades, and Steps, page 11

**Setting Grade Advance Criteria**

Access the Grade Advance Criteria page.

The screenshot displays the 'Grade Advance Criteria' page. At the top, there are tabs for 'Salary Grade Table', 'Categorization Defaults', 'Salary Step Components', and 'Grade Advance Criteria'. Below the tabs, the 'SetID' is 'SHARE' and the 'Salary Administration Plan' is 'KC01 CDN Salary Administration Plan'. The 'Salary Grade' is '001'. The 'Effective Date' is '01/01/1997' and the 'Status' is 'Active'. The 'Description' is 'Standard Pay Grade 1'. There are input fields for 'Required Yrs in Current Grade', 'Max Yrs in Current Grade', 'Minimum Age', and 'Number of Reviews'. The 'Required Eligibility Points' and 'Review Weight Total' are also shown, with the total being '0.00'. A table titled 'Review Weight' has two columns: '\*Review Sequence' and '\*Review Weight'. The table contains one row with '1' in the sequence column and '0.00' in the weight column. Navigation buttons like 'Find', 'View All', 'First', 'Last', and '+' '-' are present.

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.

## (USF) Establishing Salary Steps Within a Salary Grade

Access the Salary Step Table page.

The screenshot displays the 'Salary Step Table' page. At the top, there are tabs for 'Salary Grade Table' and 'Salary Step Table'. Below the tabs, the following information is shown:

- SetID:** SHARE
- Std Hrs/Wk:** 40.00
- Salary Administration Plan:** KC01 CDN Salary Administration Plan
- Salary Basis:** A Annl Basis
- Salary Grade:** 001
- Currency Code:** CAD Dollar

The main section is titled 'Step Rate Table' and includes a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. Below this, the following details are provided:

- Effective Date:** 01/01/1997
- Status:** Active
- Description:** Standard Pay Grade 1

The 'Step Rates' table is displayed below, with columns for \*Step, Step, Hourly Rate, Biweekly Rate, Monthly Rate, Annual Rate, and Next Step Increment (Weeks, Days, WGI). The table contains five rows of data:

*Step	Step	Hourly Rate	Biweekly Rate	Monthly Rate	Annual Rate	Next Step Increment
						Weeks Days WGI
1	1	7.280000		1,261.87	15,142.40	80 + -
2	2	7.650000		1,326.00	15,912.00	80 + -
3	3	8.010000		1,388.40	16,660.80	80 + -
4	4	8.370000		1,450.80	17,409.60	80 + -
5	5	8.740000		1,514.93	18,179.20	80 + -

Salary Step Table page

**Salary Basis**

Displays the salary basis.

**Federal Step**

The step that is associated with the Federal pay plan.

<b>BiWeekly Rate</b>	Displays the total biweekly rate value of all the rate codes of the salary step in the currency of the salary step.
<b>Next Step Increment – Weeks</b>	The number of weeks before the employee is moved into the next step based on the employee's entry date into the step.
<b>Next Step Increment – Days</b>	The number of days before the employee is moved into the next step based on the employee's entry date into the step.
<b>Next Step Increment – WGI</b>	Define the leave without pay (LWOP) threshold hours. This is the number of consecutive LWOP hours before WGI due date is impacted. The WGI/Tenure Update process compares threshold hours to the employee's unprocessed nonpay hours to determine if the employee's WGI due date has been impacted.  <i>See PeopleSoft 8.8 Payroll for North America PeopleBook, "(USF) Administering Additional U.S. Federal Payroll Functionality," Processing WGI, Tenure, and Probation Nonpay Hours.</i>

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## Running Salary Grades and Salary Steps Reports

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

## Pages Used to Run the Salary Grades and Salary Steps Reports

Page Name	Object Name	Navigation	Usage
Salary Structure	RUNCTL_ASOFDATA	Compensation, Salary Planning, Salary Plan Reports, Salary Structure	Run the Salary Structure report (CMP001). This report lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.
Salary Grade Table	PRCSRUNCNTL	Compensation, Salary Planning, Salary Plan Reports, Salary Grade	Run the Salary Grade Table report (PER706A). This report lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.
Salary Grade/Step Tables	RUNCTL_PER706B	Compensation, Salary Planning, Salary Plan Reports, Salary Grade/Step	Run the Salary Grade and Step Tables report (PER706B). This report lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.

### Running the Salary Grade/Step Tables Report

Access the Salary Grade/Step Tables page.

Salary Grade/Step Tables page

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

## Setting Up Salary Increase Budgeting and Planning

When you create salary increase budgets and plans, you first need to set up control data that the system uses to determine 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 Salary Increase Budgeting and Planning

Page Name	Object Name	Navigation	Usage
Salary Plan Default Values	SAL_PLAN_CONTROL	Compensation, Salary Planning, Group Budgets, Define Budgets Default	Define default budget and salary increase plan control dates, currency defaults, the salary increase method, eligibility dates, and salary increase effective date.
Group Default Values	SAL_PLAN_CNTRL_GRP	Compensation, Salary Planning, Group Budgets, Define Group Budget Defaults	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

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

Default Values

\***Budget Period Start Date:**   (Increases effective between these dates)

\***Budget Period End Date:**

\***Salary Planning Start Date:**   (As of date for base salaries)

\***Currency Code:**   US Dollar

**Level of Proration:**   Annual

\***Default Rate Type:**   Official Rate

Salary Increase Method

All Employees at the Same Time       Employee Anniversary Date

Eligibility Dates

**New Hire Eligibility Date:**   (Cutoff for inclusion in plan)

▼ Mexico

Increase Method

By Budget       By Matrix

Salary Plan Default Values page

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

### Default Values

<b>Budget Period Start Date and Budget Period End Date</b>	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.
<b>Salary Planning Start Date</b>	Enter the salary planning start date. The system basis its calculations for new increases on the salary planning start date.
<b>Currency Code</b>	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.
<b>Level of Proration</b>	Displays budget and salary plan calculations in the frequency that you select here. The available values are from the Frequency Table.
<b>Default Rate Type</b>	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, you must:

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

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

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

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

## Eligibility Dates

### New Hire Eligibility Date

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

Enter the cutoff point for 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**

Chapter 3, “Setting Up Plan Salaries,” Setting Up Salary Plans, Grades, and Steps, page 11

## Establishing Default Control Values for Salary Increase Budgets and Plans

Access the Group Default Values page.

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.

## 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.

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## Understanding Salary Plans

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.

## 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 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 8.8 Application Fundamentals for HRMS PeopleBook*, “Working With Currencies”

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## Understanding Salary Increase Guidelines

The system ties the data in the Salary Increase Matrix table 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  $\frac{(\$26,000 - \$25,000)}{\$5,000} = \frac{1}{5}$  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.

---

## Understanding Salary Grades and Steps

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

When you 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.

## (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.

### 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%	$800.6 = 48$
Previous	S	100	40%	$1000.4 = 40$

**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	$\frac{(80 + 100)}{2} = 90$
Previous	S	100	$\frac{(80 + 100)}{2} = 90$

---

## 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.

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**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.

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### **See Also**

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce”

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Updating Workforce Information”

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Installing PeopleSoft HRMS”

## **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 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs”

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Organization Foundation Tables,” Establishing Locations

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## **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**

[Chapter 8, “Processing Mass Salary Increases,” page 93](#)

[Chapter 6, “Budgeting and Planning Salary Increases,” page 53](#)

## Common Elements Used in This Section

<b>Salary Administration Plan</b>	Select the plan for which you are running the automated step increase.
<b>Start Date and End Date</b>	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.
<b>Job Effective Date</b>	<p>If this salary plan has an hourly-based step progression, enter the job effective date.</p> <p>If this salary plan has a date-based step progression, the job effective date is the previous step entry date plus the number of months required for the next step increase.</p>
<b>Rating Scale</b>	Select a rating scale for which you want to set minimum criteria. The system displays the associated Rating Model.
<b>Review Rating</b>	Enter the minimum criteria for employees if the Rating Scale that you selected is an <i>Average</i> scale type.

## Pages Used to Run the Automated Step Increase Process

Page Name	Object Name	Navigation	Usage
Automated Step Increase	RUNCTL_CMP007	Compensation, Salary Planning, Salary Planning Administration, Automated Step Increment	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	Compensation, Salary Planning, Salary Planning Administration, Automated Step Increment EG	Automatically move employees to the next salary step when they have completed the required time in the current step.

## Entering Salary Changes in the Job Data Pages Manually

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 8.8 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.

## Moving Employees to the Next Step

Access the Automated Step Increase page.

Automated Step Increase page

**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 [Chapter 3, "Setting Up Plan Salaries," Defining Salary Plan Characteristics, page 14.](#)

**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**

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#)

**Report Request Parameters**

SetID:  User ID: PS  
 Salary Administration Plan:  Salary Grade:   
 Start Date for Step Increments:    
 End Date for Step Increments:    
 Job Effective Date:

**Processing Options**

Report Only  
 Report & Process Increases

**Audit Indicators**

Step  Step Entry Date  Compensation Rate  Change Amount  
 Hourly Rate  Monthly Rate  Annual Rate  Change Percentage

**Exclusions** [Customize](#) [Find](#)  First  1 of 1  Last

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

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.

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## 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 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs”

### 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  $Range \% = \left( \frac{EE\ Salary - Min\ of\ Range}{EE\ Salary} \right) 100$ .
- If the employee falls above the Maximum Range, then  $Range \% = \left( \frac{(EE\ Salary - Max\ of\ Range)100}{Max} \right) + 100$ .
- If the employee falls in the Range, then  $Range \% = \left( \frac{EE\ Salary - Min\ of\ Range}{Max - Min} \right) 100$ .

## 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, Above Maximum Analysis, and Departmental Salaries report.

### Pages Used to Run Employee Salary Structure Reports

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

Page Name	Object Name	Navigation	Usage
Below Minimum Analysis	RUNCTL_ASOFFDATE	Compensation, Salary Planning, Salary Plan Reports, Below Minimum Analysis	Use this page to run the Below Minimum Analysis report (CMP004). This report lists the salary grades containing employees under the minimum, the associated minimum amount, the employee's annual rate, and the amount below both in dollars and as a percentage. The report displays those employees whose Employee Status is <i>Active, Leave of Absence, Suspended, or Leave with Pay</i> .
Above Minimum Analysis	RUNCTL_ASOFFDATE	Compensation, Salary Planning, Salary Plan Reports, Above Maximum Analysis	Use this page to run the Above Maximum Analysis report (CMP005). For each employee, the report shows the job code and title, name, department ID, the maximum amount, the employee's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those employees whose Employee Status is <i>Active, Leave of Absence, Suspended, or Leave with Pay</i> .
Salary History by Department	RUNCTL_LC_HR	Compensation, Salary Planning, Compensation Reports, Salary History by Department	Run the Departmental Salaries report (PER012). This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each.

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

## (JPN) Running the Grade Advance Candidate Report

Access the Grade Advance Candidate JPN page.

Grade Advance Candidate JPN

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) Run

Language: English

Candidate Selection Conditions

SetID:   Sal Plan:   Grade:   As Of Date:

Nbr of Reviews: -----

Required Yrs in Current Grade: \_\_\_\_\_

Min Age: \_\_\_\_\_

Required Eligibility Points:

----- or -----

Max Yrs in Current Grade: \_\_\_\_\_

Applicable Reviews [Customize](#) | [Find](#) |

Review ID	Doc Type	Review Weight
1		

First  1 of 1  Last

Grade Advance Candidate JPN page

**SetID** Enter the Set ID. This is necessary because Salary Plans can be used in multiple Sets.

<b>Sal Plan</b> (salary plan)	Enter the salary plan of the grade you want the candidate list for.
<b>Grade</b>	Enter the grade you want the eligibility report on.
<b>Nbr of Reviews</b> (number of reviews)	Displays the number of reviews you have specified for inclusion in the eligibility points count. This information comes from the Grade Advance Criteria page.
<b>Required Yrs in Current Grade</b> (required years in current grade)	Displays the number of years employees must be in this grade before they become eligible to advance from this grade. This information comes from the Grade Advance Criteria page.
<b>Min Age</b> (minimum age)	Displays the minimum age employees must have reached before they can advance from this grade. This information comes from the Grade Advance Criteria page. The system uses the employee's Education Level Age when determining this minimum age.
<b>Reqd Elig Pts</b> (required eligibility points)	Even though you have already defined the required eligibility points for a grade advance in the Grade Advance Criteria page, you have the flexibility to adjust this points criteria for actual reporting. For example, you may want to see how many more or how many fewer employees become eligible to advance from this grade if you reduce or increase the required points respectively.

—*or*—

<b>Max Yrs in Current Grade</b> (maximum years in current grade)	Displays the maximum years in the current grade that you set on the Grade Advance Criteria page. The system automatically lists as eligible all employees who have reached the maximum years for the grade, irrespective of all other criteria.
--	---

## Applicable Reviews

<b>Review ID</b>	Displays the review IDs and descriptions of all the reviews that will be included in the eligibility points count. There will be as many as you specified in the Number of Reviews field on the Grade Advance Criteria page. The system selects the reviews based upon their IDs, which are also their effective dates. For two reviews, it selects the most recent effective date/review ID and the next most recent effective date/review ID.
<b>Doc Type</b>	Displays the Doc Type from the Review Definition page.
<b>Review Weight</b>	Displays the Review Weight you entered on the Grade Advance Criteria page. If you are using the non-weighted—simple average—method and didn't add any review sequences or weightings, these fields will be blank. The system just totals the review points and divides by the number of reviews from which those points came.



## CHAPTER 5

# Reviewing Employee Performance History

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

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

---

## Viewing Employee Review History

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

Employee reviews are conducted in the PeopleSoft Human Resources Employee Review business process.

## 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.

## Pages Used to Conduct Employee Reviews

Page Name	Object Name	Navigation	Usage
Employee Review	EMPLOYEE_REVIEW_1	Compensation, Salary Planning, Employee Review History, Review History	View employee reviews.
Reviewers	EMPLOYEE_REVIEW_2	Compensation, Salary Planning, Employee Review History, Review History	Review the list of competencies included in the rating scale and appropriate review fields.
Reviewers: Comment	EMP_RVW_RATING_SEC	Click the button at the end of the grid row for the competency whose comments you want to review.	Review comments about an individual competency.
Comments	EMPLOYEE_REVIEW_3	Compensation, Salary Planning, Employee Review History, Review History	Review comments about the overall review. The same reviewer can record comments related to reviews for different evaluation types.
Goals	EMPLOYEE_REVIEW_4	Compensation, Salary Planning, Employee Review History, Review History	Review employee goals and objectives.

## Accessing Employee Reviews

Access the Employee Review page.



**Total Review Amount, Total Review Percent or Total Review Salary Points** Depending on the resolution of the rating scale rating points, the system calculates and displays 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** Displays the status of this review.

**Loaded to Job** Selected if you loaded the changes to the Job record.

### Viewing Fields on the Employee Review Page

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

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

### Accessing Reviewers Comments

Access the Reviewers page.

Employee Review
**Reviewers**
Comments
Goals

Griffiths, Martina Rae
Employee
EmplID: KC0001
Empl Rcd#: 0

**Review Details**
Find | View All
First ◀ 1 of 1 ▶ Last

**Eff Date:** 04/01/2000
**Next Review Date:** 04/01/2001

**Business Unit:** CAN01 CAN01 BU

**Job Code:** 800010 Sr Scry

**Reviewers**
Find | View All
First ◀ 1 of 1 ▶ Last

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

Competency	Description	Weight (%)	Rating	Short Desc	Rating
		0			

**Total Percent:**
**Weighted Average:**

**Weight (%):** 100

▼ French Public Sector

**Average Percent Increase:**
**Rating:**

Reviewers page

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

### Review Details

**Salary Administration Plan** The system displays the employee’s salary plan, grade, and step.

### Reviewers

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


### Competencies

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

Average	Summation	Review Band
Competency	Competency	Competency
Weight (%)	Rating	Rating
Rating	Points	Points

Average	Summation	Review Band
Total Percent	Total Review Points	Total Review Points
Weighted Average		

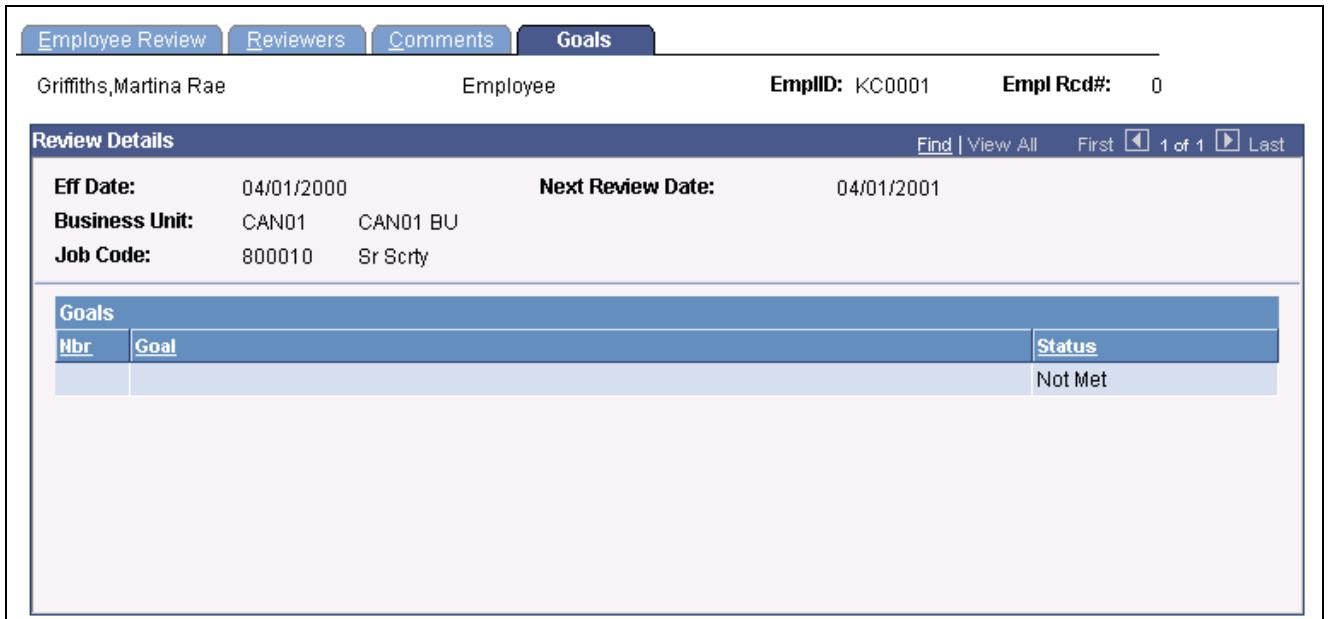
**Competencies Field Definitions**

<b>Competency</b>	Displays the competencies that you defined for the rating scale on the Rating Scale Table.
<b>Description</b>	Displays the short description of the competency.
<b>Weight (%)</b>	(For Average scale only.)  The system displays the weight percent. The total of weight percents equals 100 percent for the employee.
<b>Rating</b>	Displays the review rating that you want to give the employee for this competency.
<b>Points</b>	(For Summation and Review Band scales only.)  Displays the points for this competency.
	Click the EE Review Rating Comment button to access the Reviewers Comment page, where you can view comments about the review rating for this competency.
<b>Total Percent</b>	(For Average scale type only.)  The system enters the total of the competency weights.
<b>Weighted Average</b>	(For Average scale type only.)  Displays the sum of the competency ratings multiplied by their weight percents.
<b>Total Review Points</b>	(For Summation and Review Band scales only.)  Displays the total review points a reviewer assigned all of the competencies.
<b>Review Totals</b>	
<b>Weight (%)</b>	Displays the total percent of reviews completed. For example, if reviewer 1 has 50 percent weight and reviewers 2 and 3 each have 25 percent weight, this field will show 75 percent after reviewers 1 and 2 have completed their reviews.
<b>Total Review Points</b>	(For Summation and Review Band scales.)  Displays the total review points for the reviews completed up to this point.
<b>Review Result</b>	The system multiplies the total review score for each reviewer by the reviewer weight (taken as a percentage), and adds these weighted review scores.

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

## Reviewing Employee Goals

Access the Review History - Goals page.



Goals page

Employee

### Goals

**Nbr** (number)

Displays the sequence number for the goals that you add.

**Goal**

The system displays goals from the employee’s career plan.

**Status**

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

### See Also

*PeopleSoft 8.8 Human Resources PeopleBook: Plan Careers and Successions*, “Planning Careers,” Creating Career Plans

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## Reporting on Employee Reviews

In this section, we discuss how to run the employee review report.

## Page Used to Run the Employee Review Report

Page Name	Object Name	Navigation	Usage
Employee Review Audit	RUNCTL_PER008	Compensation, Salary Planning, Employee Review History, Review Audit	Run the Employee Review Audit report (PER008). This report lists the employee review data that appears in the Employee Review component.



## 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.

---

## Understanding the Salary Increase Budgeting and Planning Business Process

The following list outlines briefly the steps in the salary budgeting and planning process.

To budget and plan salary increases:

1. Create a salary increase group using group build pages.  
*See PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Groups,” Setting Up Group Definitions.*
2. Set up salary increase budgeting and planning control tables.  
*See Chapter 3, “Setting Up Plan Salaries,” Pages Used to Set Up Salary Increase Budgeting and Planning, page 27.*
3. Create requested budgets by pay component.
4. Compare proposed budgets and make adjustments.
5. Approve a budget or go directly to salary planning without approving the budget first.
6. Establish a salary increase plan for employees in the group based on the budget.
7. Manually adjust increases of individual employees in the group.
8. Compare salary plan figures with budget figures.
9. Finalize and approve the salary increase plan.
10. Populate employee records with planned, approved increases.

## See Also

[Chapter 3, “Setting Up Plan Salaries,” Establishing Default Control Values for Salary Increase Budgets and Plans, page 30](#)

[Chapter 6, “Budgeting and Planning Salary Increases,” Budgeting Group Increases, page 56](#)

[Chapter 6, “Budgeting and Planning Salary Increases,” Planning Group Salary Increases, page 69](#)

[Chapter 6, “Budgeting and Planning Salary Increases,” Loading Salary Changes to Compensation Records, page 79](#)

## Common Elements Used in This Chapter

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

---

## (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.

---

### 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:

$$\text{Quartile} = \text{Min.} + \left[ \text{Quartile No.} \left( \text{Max.} - \frac{\text{Min.}}{4} \right) \right]$$

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.

---

### 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:

$$\text{Increase percentage} = \frac{(9.0 + 5.0)}{2} = 7.0$$

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

[Chapter 3, "Setting Up Plan Salaries," Defining a Salary Increase Matrix, page 13](#)

[Chapter 3, "Setting Up Plan Salaries," Setting Up Salary Plans, Grades, and Steps, page 11](#)

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Hiring Your Workforce," Entering Employee Salary Plan Information

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Hiring Your Workforce," Entering Employee Compensation Information

[Chapter 3, "Setting Up Plan Salaries," page 11](#)

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## 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.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Setting Up Groups," Setting Up Group Definitions.

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 8.8 Application Fundamentals for HRMS PeopleBook*, “Working With Groups”

Chapter 6, “Budgeting and Planning Salary Increases,” Planning Group Salary Increases, page 69

## Common Elements Used in This Section


<b>Budget Period and Level of Proration</b>	Displays the control dates and the level of proration that you set up for the group in the Sal Plan Group Default Values page.
<b>Total Count</b>	Displays the total count of employees in the group as of the salary plan start date.
<b>FTE (full time equivalency)</b>	Displays the FTE for the group as of the salary plan start date.
<b>Total Annual Salaries</b>	<p>The field is the total sum of salaries for employees who meet the following criteria:</p> <ul style="list-style-type: none"> <li>• They are in the group as of the salary plan start date.</li> <li>• Their employee status is Active, Leave of Absence, Leave with Pay, or Suspended.</li> <li>• They’re eligible for an increase as of the salary plan start date.</li> <li>• 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.</li> </ul>

## Pages Used to Budget Group Increases

Page Name	Object Name	Navigation	Usage
Group Increase Budget – Budget Description	GROUP_INCR_BUDGET1	Compensation, Plan Salaries, Group Budgets, Create/Approve Group Budget	Assign a Budget ID and describe a salary increase budget for a group of employees.
Group Increase Budget – Budget Requested	GROUP_INCR_BUDGET2	Compensation, Salary Planning, Group Budgets, Create/Approve Group Budget	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.
Group Increase Budget – Budget Components	GROUP_INCR_BUDGET3	Compensation, Salary Planning, Group Budgets, Create/Approve Group Budget	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_CALCIBUDGET	Compensation, Salary Planning, Group Budgets, Calculate Group Budget	<p>Run the Budget Calculation application engine process, which calculates the total budget amount and percent for the rate code increases that you enter on the Group Increase Budget - Budget Components page.</p> <p>It enters the totals in the Requested and Current data rows on the Group Increase Budget - Budget Requested page.</p> <p>You can calculate the budget using online processing if the group is small. For large groups, use this application engine process.</p> <p>Define a group increase budget before using this page.</p>

## Setting Up a Budget Description

Access the Group Increase Budget - Budget Description page.

Budget Description	Budget Requested	Budget Components
<b>Group ID:</b>	HXECOMP2	e-Comp Group 2
<b>Budget</b>		
<b>Budget Period:</b>	01/01/2001 - 12/31/2001	<a href="#">Get Group</a>
<b>Level of Proration:</b>	Annual	
<b>Budget ID:</b>	HXECOMPID	
<b>*Description:</b>	<input type="text" value="Annual"/>	
<b>Short Description:</b>	<input type="text" value="HXECID"/>	
<b>Group Default Values</b>		
<b>Salary Planning Start Date:</b>	01/01/2001	<b>New Hire Eligibility Date:</b> 06/01/2000
<b>As of Salary Plan Start Date</b>		
<b>Total Count:</b>	14	<b>Total FTE:</b> 10.500000
		<b>Total Annual Salaries:</b> 664,650.00  USD

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.



Budget Description	Budget Requested	Budget Components
<b>Group ID:</b>	HXECOMP2	e-Comp Group 2
<b>Budget Period:</b>	01/01/2001 - 12/31/2001	<b>Budget ID:</b> HXECOMPID <b>Level of Proration:</b> Annual
<b>Budget</b> Find   View All First 1 of 1 Last		
<b>*Effective Date:</b>	01/01/2001	<b>Seq:</b> 0 <b>Request Approval</b> + -
<b>*Action:</b>	Promotion	<b>Reason:</b> NCP Normal Career Progression
<b>Budget Manager:</b>	KU0010	<b>Rcd#:</b> 0 Santos, Antonio
<b>Requested:</b>	Percent: 10.27 Amount: 732,915.000 Date: 01/01/2001	<b>Budget Approved</b> <input checked="" type="checkbox"/>
<b>Current:</b>	Percent: 10.27 Amount: 732,915.000 Date: 01/01/2001	<b>Grand Totals</b>
<b>Planned Increases:</b>	Percent: 10.27 Amount: 68,265.00 Date: 01/01/2001	<b>Amt:</b> 732,915.000000 <b>%:</b> 10.27
<b>Variance:</b>		<b>Salary Plan Approved</b> <input type="checkbox"/>
<b>As of Salary Plan Start Date</b>		
<b>Total Count:</b>	14	<b>Total FTE:</b> 10.500000 <b>Total Annual Salaries:</b> 664,650.00 USD

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 Calculate to calculate the budget and populate the Current, Requested, Planned Increase and Variance Percent, and Amount fields on this page.

Requested Approval button: When clicked, a notification is sent to the approver ID.

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 = 
$$\frac{\text{Requested Amount} - \text{Total Annual Salaries prorated to level of proration}}{\text{Total Annual Salaries prorated to level of proration}} \times 100$$
- Current Percent = 
$$\frac{\text{Current Amount} - \text{Total Annual Salaries prorated to level of proration}}{\text{Total Annual Salaries prorated to level of proration}} \times 100$$
- Planned Increase Percent = 
$$\frac{\text{Planned Increase Amount}}{\text{Total Annual Salaries prorated to level of proration}} \times 100$$
- Variance Percent = 
$$\frac{\text{Variance Amount}}{\text{Total Annual Salaries prorated to level of proration}} \times 100$$

---

**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**

Chapter 6, “Budgeting and Planning Salary Increases,” Understanding Salary Increase Budgeting Procedures, page 57

## Entering and Calculating Budget Components

Access the Group Increase Budget - Budget Components page.

**Budget Components**

Group ID: HXECOMP2 e-Comp Group 2

Budget Period: 01/01/2001 - 12/31/2001 Budget ID: HXECOMPID Level of Proration: Annual

Eff Date: 01/01/2001 Seq: 0 Action: PRO Promotion Reason: NCP Norm Prog

Requested Budget						
Rate Code	Change Amount	Total Increase	Currency	Frequency		
HXFLT1	Flat 1	21000.000000	USD	A	+	-
HXFLT2	Flat 2	27500.000000	USD	A	+	-
HXHR01	Hourly 1	4.000000			+	-
HXPNT1	Points 1	10800.000000		A	+	-

Current Budget						
Rate Code	Change Amount	Change Percent	Change Points	Percent of Points	Add Percent	
HXFLT1		10.00				+
HXFLT2		10.00				+
HXHR01		10.00				+
HXPNT1				10.00		+

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 Increase Calculation 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 Increase Calculation 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**

[Chapter 6, “Budgeting and Planning Salary Increases,” Entering and Calculating Budget Components, page 64](#)

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## 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
Compare Group Budgets - Budgets	BUDGET_COMPAR3_INQ	Compensation, Salary Planning, Group Budgets, Compare Group 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.
Compare Group Budgets - Comparison	BUDGET_COMPAR1_INQ	Compensation, Salary Planning, Group Budgets, Compare Group Budgets	View the requested amount and requested percent variance between one budget and all others that you selected on the Budgets Inquiry page.
Compare Group Budgets - Components	BUDGET_COMPAR2_INQ	Compensation, Salary Planning, Group Budgets, Compare Group Budgets	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 Compare Group Budgets - Budgets page.

Budgets	Comparison	Components				
<b>Group ID:</b> HXECOMP2 e-Comp Group 2		<input type="button" value="Compare"/>				
<b>Budget Period Start Date:</b> 01/01/2001						
Budgets						
<input type="checkbox"/>	Budget ID	Short Descr	Effective Date	Seq	Action	Reason
<input checked="" type="checkbox"/>	HXECOMPID	HXECID	01/01/2001	0	Promotion	Norm Prog

Compare Group Budget - 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

[Chapter 6, "Budgeting and Planning Salary Increases," Budgeting Group Increases, page 56](#)

## Viewing Budget Variances

Access the Compare Group Budgets - Comparison page.

Budgets		Comparison		Components							
<b>Group ID:</b>	HXECOMP2	e-Comp Group 2									
<b>Budget Period Start Date:</b>	01/01/2001										
Requested Budgets											
										Customize   Find	First 1 of 1 Last
Budget ID	Eff Date	Seq	Action	Reason	Requested Amount	Requested Pct	Variance	Amount Variance	Budget Approved	Budget Appr Date	
		0					<input type="checkbox"/>		<input type="checkbox"/>		

Compare Group Budgets - 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.

### 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

[Chapter 6, “Budgeting and Planning Salary Increases,” Understanding the Salary Increase Budgeting and Planning Business Process, page 53](#)

[Chapter 6, “Budgeting and Planning Salary Increases,” Understanding Salary Increase Budgeting Procedures, page 57](#)

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## 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.

### **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.

### **See Also**

[Chapter 6, "Budgeting and Planning Salary Increases," Understanding Salary Increase Budgeting Procedures, page 57](#)

## Pages Used to Plan Group Salary Increases

Page Name	Object Name	Navigation	Usage
Salary Plan Calculation	RUNCTL_SALPLNGRP	Compensation, Salary Planning, Group Increases, Calculate Group Increases	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	Compensation, Salary Planning, Group Increases, Assign Group Increases	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	Compensation, Salary Planning, Group Increases, Assign Group Increases	Show the totals by effective date, effective sequence, action, and action reason as well as the overall grand totals of your planned salary increases.
Budget Information	SAL_PLAN_GRP_BDGT	Compensation, Salary Planning, Group Increases, Assign Group Increases	Displays budget information.

## Applying Group Increases

Access the Propose Raises page.

**Propose Raises** | Summarize and Approve Raises | Budget Information

**Group ID:** HXECOMP2    Group 2    **Budget ID:** HXECOMPID HXECID  
**Budget Period Start Date:** 01/01/2001 - 12/31/2001    **Start Dt:** 01/01/2001    **By Budget:** BU

1 to 14 of 14    Total in Group: 14    [Get Group](#)

**Propose Raises**    Find | View All    First 1 of 14 Last

MacGregor,Kelsey    **EmplID:** HXEC01    **Empl Rcd#:** 0

**\*Effective Date:** 01/01/2001    **Effective Sequence:** 0  
**\*Action:** PRO Promotion    **Reason:** NCP Norm Prog

**New Compensation Rate:** 1,458.33 USD    **New Annual Rate:** 17,500.00 USD  
**Compensation Frequency:** Monthly    **New % Range:** -174.3  
**Change Amount:** 0.00    **Months Since Last Increase:** 12.0  
**Change Percent:** 0.000    **Annual Increase Percent:** 0.0  
**New Compa Ratio:** 0.58

**Pay Components**

Rate Code	Seq	Details	New Comp Rate	New Currency	New Frequency	New Points	New Percent	New Rate Code Group
ZFLT1	0	Details	35,000.00 USD	USD	A			

Propose Raises page (1 of 5)

**Pay Components**

Rate Code	Seq	Change Amount	Change Points	Change Percent
ZFLT1	0	USD	Annual	

Propose Raises page (2 of 5)

**Pay Components**

Rate Code	Seq	Source	Default Without Override	Apply FTE	Convert Comprt
ZFLT1	0	Manual	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1,458.333334 USD Monthly

Propose Raises page (3 of 5)

**Employee Review Rating**

**Doc Type:**    **Begin Date:**    **End Date:**  
**Calculation Method:**    **Rating Model:**  
**Review Rating:**    **Min %:** 0.0    **Max %:** 0.0    **Status:**

**Employee Salary History**

Job EffDt	Job EffSeq	Action	Reason	Comp Rate	Currency	Frequency	Change Percent	Change Amount
01/01/2000		HIR	NPS	1,458.333334	USD	M		

Propose Raises page (4 of 5)

Employee Salary History							
Rates		Salary Grade					
Job EffDt	Job EffSeq	Salary SetID	Sal Plan	Grade	Comp-Ratio	Month Last Incr	Job Ratio
01/01/2000		HXSID	HXA1	001			

Propose Raises page (5 of 5)

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 Get Group , the system does not calculate the default proposed budgeted increases for employees added to the group. Click Increase Calculation 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 Increase Calculation 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.

<b>Effective Sequence</b>	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.
<b>Action and Reason</b>	Select the action and reason that you defined for the budget increase on the Group Increase Budget - Budget Requested page.
<b>New Compensation Rate</b>	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.
<b>Compensation Frequency</b>	Displays the currency code and frequency specified in the employee's Job record. This is the currency and frequency in which the calculations appear.
<b>Change Amount</b>	Displays the amount of the employee's total increase for this effective date, sequence, action, and reason for all components of the budget that are in the employee's compensation package.
<b>Change Percent</b>	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.
<b>New Compa Ratio</b>	Displays the employee's new compa-ratio. The system calculates the compa-ratio figure from the data in the Salary Grade Table.
<b>New Annual Rate</b>	The system calculates and displays the employee's new annual rate by applying the budgeted increase for this effective date, sequence, action, and reason to the applicable rate codes in the employee's compensation package.
<b>New % Range</b> (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.
<b>Months Since Last Increase</b>	Displays the number of months since the employee's last increase.
<b>Annual Increase Percent</b>	Displays the employee's annualized change in terms of percent.
<b>Job Ratio</b>	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 Grand Total 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 Grand Total section of the Summarize and Approve Raises page. The Refresh Budget button updates the requested budget on the Budget Requested page.

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

---

### Amounts Tab

<b>Rate Code</b>	Displays the rate codes in the employee's compensation package. If you are manually entering a new data row you can select a rate code from the valid values.
<b>Seq</b>	Displays the sequence number of the rate code in the compensation package.
<b>New Comp Rate</b>	Displays the compensation rate for the rate code after applying the new amount, percent, or points.
<b>New Currency</b>	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.
<b>New Frequency</b>	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.
<b>New Points</b>	If you proposed an additional point value for the rate code, displays the new point value here.
<b>New Percent</b>	If you proposed a different percent value for the rate code, displays the new percent value here.
<b>New Rate Code Group Name</b>	You can select a different rate code group for the percent increase.

### Changes Tab

<b>Rate Code</b>	Displays the rate codes in the employee's compensation package. If you are manually entering a new data row you can select a rate code from the valid values.
<b>Seq</b>	Displays the sequence number of the rate code in the compensation package.
<b>Change Amount</b>	Displays the proposed change in the amount of compensation for the rate code, in the currency and frequency of the rate code.

<b>Change Points</b>	If the rate code type is Points, Displays the proposed change in the points for the rate code. You can enter a value for a new data row if the rate code type is Points.
<b>Change Percent</b>	Displays the proposed percent of change in the compensation for the rate code.
<b>Conversion Tab</b>	
<b>Convert Comprt</b> (converted compensation rate)	Displays the compensation rate for the rate code converted to the employee's compensation frequency and currency.
<b>Default Without Override</b>	Used for multiple components of pay.
<b>Apply FTE</b>	The system indicates whether Apply FTE is selected for this rate code in the Comp Rate Code Table.

### Employee Review Rating

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.

<b>Job EffDt</b> (job effective date) and <b>Job EffSeq</b> (job effective sequence)	The effective date and effective sequence of the change in the employee's compensation.
<b>Action and Reason</b>	The action and reason that resulted in the change in the employee's compensation, as recorded in the Job record.
<b>Comp Rate</b> (compensation rate)	The employee's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
<b>Currency and Frequency</b>	The currency and frequency of the employee's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
<b>Change Percent and Change Amount</b>	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

<b>Job EffDt</b> (job effective date) and <b>Job EffSeq</b> (job effective sequence)	The effective date and effective sequence of the change in the employee's compensation.
<b>Salary SetID</b>	The setID associated with the employee's salary.
<b>Sal Plan</b> (salary plan) and <b>Grade</b>	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**

[Chapter 6, “Budgeting and Planning Salary Increases,” Viewing Budget Information, page 78](#)

## Viewing the Salary Plan Summary

Access the Summarize and Approve Raises page.

**Summarize & Approve Raises** Customize | Find | View All | First 1-14 of 14 Last

**Group ID:** HXECOMP2 e-Comp Group 2 **Budget ID:** HXECOMPID HXECID  
**Budget Period:** 01/01/2001 - 12/31/2001 **Salary Planning Start Date:** 01/01/2001

**Approve All** **Grand Total**  
**Total Annual Salaries:** 0.00 USD **Average Percent:** 0.00

Rank	*Status	EmplID	Rcd#	Eff Date	Seq	Action	Reason	Comp Rate	Job Curr/Freq	Annual Increase
0	Proposed	HXEC01	0	01/01/2001	0	PRO	NCP	1458.33 USD	M	
0	Proposed	HXEC02	0	01/01/2001	0	PRO	NCP	2916.67 USD	M	
0	Proposed	HXEC03	0	01/01/2001	0	PRO	NCP	1604.17 USD	M	
0	Proposed	HXEC04	0	01/01/2001	0	PRO	NCP	3208.33 USD	M	
0	Proposed	HXEC05	0	01/01/2001	0	PRO	NCP	3895.83 USD	M	
0	Proposed	HXEC06	0	01/01/2001	0	PRO	NCP	7791.67 USD	M	
0	Proposed	HXEC07	0	01/01/2001	0	PRO	NCP	3895.83 USD	M	
0	Proposed	HXEC08	0	01/01/2001	0	PRO	NCP	7791.67 USD	M	
0	Proposed	HXEC09	0	01/01/2001	0	PRO	NCP	2500.00 USD	M	-48,000.00
0	Proposed	HXEC10	0	01/01/2001	0	PRO	NCP	5000.00 USD	M	
0	Proposed	HXEC11	0	01/01/2001	0	PRO	NCP	1941.67 USD	M	

Summarize and Approve Raises page

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

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

**Approve All** Once you have finalized the plan, click *Approve All* to mark all increases with the *Approved* status. Increases must have the *Approved* status to be loaded into the 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 Refresh 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.

Propose Raises
Summarize and Approve Raises
Budget Information

**Group ID:** HXCOMP2      e-Comp Group 2      **Budget ID:** HXCOMPID      HXECID

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

---

**Level of Proration:** Annual      **Currency Code:** USD

▼ Budget Description
Find    First ◀ 1 of 1 ▶ Last

**Effective Date:** 01/01/2001    **Seq:** 0    **Action / Reason**    Promotion    Norm Prog    Request Approval

**Budget Approved**       **Budget Approval Date:** 01/01/2001

---

**Requested Amount:** 732,915.000      **Avg Pct:** 0.00

**Current Budget Amount:** 732,915.000

**Available Amount:** 0.000

Budget Information								
Rate Code	Total Increase	Chng Amt	Change Pct	Add Percent	Chng Pts	Pct of Pts	Currency	Frequency
HXFLT1	21000.000000		10.00				USD	A
HXFLT2	27500.000000		10.00				USD	A
HXHR01	4.000000		10.00					
HXPNT1	10800.000000					10.00		A

Budget Information page

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



Click Refresh Budget 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 Refresh Budget 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**

[Chapter 6, "Budgeting and Planning Salary Increases," Budgeting Group Increases, page 56](#)

[Chapter 6, "Budgeting and Planning Salary Increases," Entering and Calculating Budget Components, page 64](#)

---

## **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 Anniversary Dts (create/refresh anniversary dates)	RUNCTL_GRPANNV	Compensation, Salary Planning, Group Budgets, Refresh Anniversary Date	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	Compensation, Salary Planning, Group Increases, Load Group Increases	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.

## Creating and Refreshing Anniversary Dates

Access the Create/Refresh Anniversary Dts page.

Create/Refresh Anniversary 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 Salary Changes

---

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameter(s)

Group ID:	<input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Position?
Budget Period Start Date:	<input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Update Future Rows

Load 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

[Chapter 6, "Budgeting and Planning Salary Increases," Understanding the Salary Increase Budgeting and Planning Business Process, page 53](#)



## CHAPTER 7

# Defining, Assigning, and Approving Merit Increases

This section discusses how to:

- Define merit increase IDs.
- Define merit groups.
- Assign and approve merit increases.
- Load merit increases into employee Job records.
- Report on merit increases.

---

## Define Merit Increase IDs and Groups

Before you can assign and approve merit increases for employees you must first define Merit Increase IDs and Merit Groups.

### Pages Used to Define Merit Increase IDs and Groups

Page Name	Object Name	Navigation	Usage
Define Merit Increase	SP_MERIT_INCR_DEFN	Compensation, Salary Planning, Merit Increases, Define Merit Increase	Use to define Merit Increase IDs for merit points or merit ranges.
Review Points Resolution	SP_MERIT_INCREASES	Compensation, Salary Planning, Merit Increases, Define Merit Increase	Use to define merit increase guidelines (review points resolutions) per merit point or per merit range.
Define Merit Group	SP_MERIT_ELIG	Compensation, Salary Planning, Merit Increases, Define Merit Group	Define review selection criteria for a Group ID. The system will use the information to retrieve employee reviews.

### Defining Up Merit Increase IDs

Access the Define Merit Increase page.

**Define Merit Increase** | Review Points Resolution

**Merit Increase ID:** HXPM

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

**\*Effective Date:** 01/01/1990

**\*Status:** Active

**\*Description:** Hourly /Flat Amount

**Short Description:** Hourly

**Merit Increase Type**

Merit Increase by Point  Merit Increase by Points Range

Define Merit Increase page

Enter a description of the Merit Increase ID.

**Merit Increase Type** Indicate if the merit increase is by point (*Merit increase per point*) or by point range (*Merit increase per points range*). The system will display different fields on the Review Points Resolution page depending on which option you choose.

## Defining Review Points Resolution

Access the Review Points Resolution page.

**Define Merit Increase** | **Review Points Resolution**

**Merit Increase ID:** 123

**Merit Increase** Find | View All First 1 of 1 Last

**Effective Date:** 07/16/2002 **Effective Status:** Active

**Rate Code:** [ ] **Rate Code Type:**

**Change Amount:** [ ] [ ] [ ]

**Change Percent:** [ ]

Review Points Resolution page (1 of 5)



Define Merit Increase | **Review Points Resolution**

**Merit Increase ID:** HPP

**Merit Increase** Find | View All First 1 of 1 Last

**Effective Date:** 10/31/2002 **Effective Status:** Active

**Merit Increase by Points Range** Customize | Find | First 1 of 1 Last

Range Flat Amount/Hourly Percent Salary Points

*Range ID	From Points	To Points	Rate Code	Rate Code Type
1	0	0		

Review Points Resolution page (2 of 5)

**Merit Increase by Points Range** Customize | Find | First 1 of 1 Last

Range Flat Amount/Hourly Percent Salary Points

*Range ID	Change Amount	Currency	Frequency	Change Percent
1				

Review Points Resolution page (3 of 5)

**Merit Increase by Points Range** Customize | Find | First 1 of 1 Last

Range Flat Amount/Hourly Percent Salary Points

*Range ID	Change Percent	Rate Code Group
1		

Review Points Resolution page (4 of 5)

**Merit Increase by Points Range** Customize | Find | First 1 of 1 Last

Range Flat Amount/Hourly Percent Salary Points

*Range ID	Change Points	Frequency	Change Percent
1			

Review Points Resolution page (5 of 5)

**Rate Code**

Select a Rate Code to associate with this Merit Increase ID. If you select a Rate Code with a Rate Code Type of:

- *Flat Amount* or *Hourly*, enter a Change Amount or a Change Percent value, but not both.
- *Percent*, enter a Change Percent and Rate Code Group (if you are using rate code groups).
- *Points*, enter Change Points or Change Percent, but not both.

- Change Amount** Enter the salary change amount, currency, and the frequency with which it is paid.
- Change Points** Enter the change in points.
- Change Percent** Enter the salary change percent.
- Rate Code Group** Select a rate code group.

### Merit Increase per Points Range

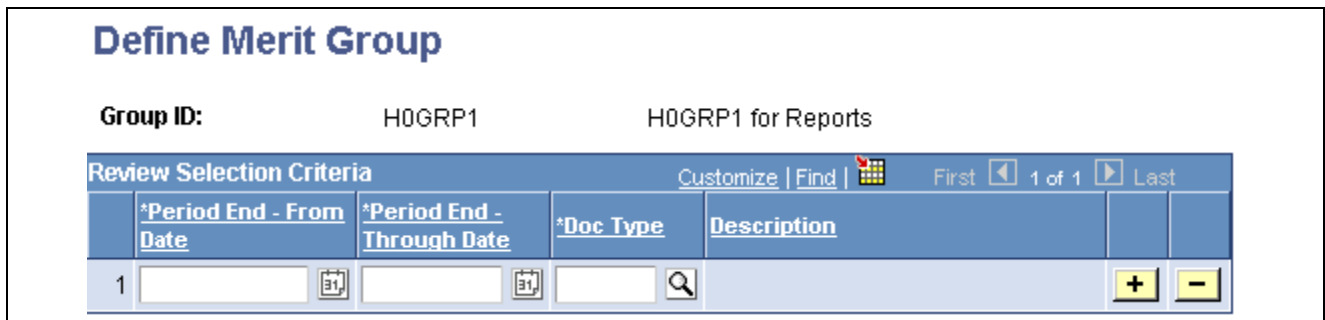
The system displays the Merit Increase per Points Range table when you select Merit increase per points range on the Define Merit Increase page.

**Range ID, From Points , and To Points** Enter a Range ID and the from and to salary points of the range.

- Rate Code** Select a Rate Code. If you select a Rate Code Type of:
- *Flat Amount* or *Hourly*, enter a Change Amount or a Change Percent value, but not both, on the Flat Amount/Hourly tab.
  - *Percent*, enter a Change Percent and Rate Code Group (if you are using rate code groups) on the Percent tab.
  - If you select *Points*, enter Change Points or Change Percent, but not both, on the Salary Points tab.

## Defining Merit Groups

Access the Define Merit Group page.



Define Merit Group page

Define a merit group. When you select a Group ID on the Assign/Approve Merit Increase, Load Merit Increase, and Report Merit Increase, the system will retrieve data for the employees of the selected group who:

- Have a review Period End Date in the Employee Review that is the latest date in the timeframe on the page.
- Have a Review Type matching the one defined.

## Assigning, Approving and Loading Merit Increases

Use the Assign/Approve Merit Increases component to:

- View the approved and completed review results for a group of employees (as defined on the Define Merit Group component).
- Calculate merit increases for a group of employees based on the review results and a Merit Increase ID.
- Adjust the merit increases calculated by the system.
- Approve or deny merit increases for individual employees in the group.

Once you have assigned merit increases and selected to approve or deny the increases, you can load the increase information into the Job table using the Load Merit Increases process.

### Pages Used to Assign and Approve Merit Increases

Page Name	Object Name	Navigation	Usage
Assign/Approve Merit Increase	SP_MERIT_INCR_GRP	Compensation, Salary Planning, Merit Increases, Assign/Approve Merit Increases	Use to calculate the merit increases for the employees in the selected group based on the employees' review results and the merit increase guidelines associated with the Merit Increase ID.
Merit Increase Details	SP_MERIT_INCR_EE	Compensation, Salary Planning, Merit Increases, Assign/Approve Merit Increases	Review details about the employee merit increase and make changes, if required.
Load Merit Increases	RUNCTL_SP_MERIT	Compensation, Salary Planning, Merit Increases, Load Merit Increases	Use the Load Merit Increases page to load the approved merit increases into employee job data and flag the increases as processed.
Report Merit Increases	RUNCTL_SP_MERIT	Compensation, Salary Planning, Merit Increases, Report Merit Increases	Use the Report Merit Increases page to create a report on the merit increases for a group of employees.

### Assigning and Approving Merit Increases

Access the Assign/Approve Merit Increase page.

Assign/Approve Merit Increase page

**Get Review Results**

Click to retrieve the review results for the employees in the merit group (as defined on the Define Merit Group page).

**Merit Increase ID**

Select a Merit Increase ID to apply to the members of this merit Group ID. Merit Increase IDs are defined on the Define Merit Increase component.

**(Re)Calculate Increases**

Click to calculate or recalculate merit increases. The system uses the change values entered on the Define Merit Increase component. The system sets the Status to *Proposed* for each employee listed. If the merit increase is zero (0), the system sets the status to *No Increase*.

---

**Note.** Click only to calculate the merit increases based on the review points resolution associated with the Merit Increase ID. If you click this after having made manual changes, the system will erase your changes and reapply the changes associated with the Merit Increase ID.

---

**Status**

Select one of the following statuses for each employee’s merit increase:

- *A — Approved*  
When you select this value, the system makes the merit increase fields unavailable for entry. Select to approve the merit increase.
- *I — Ineligible*  
When you select this value, the system makes the merit increase fields unavailable for entry. Select if the employee is ineligible for a merit increase.
- *N — No Increase*  
When you select this value, the system makes the merit increase fields unavailable for entry. Select to deny the employee the calculated increase.

- *P — Proposed*

Select to manually adjust the merit increase amount calculated by the system on the Merit Increase Details page, if required. The system will select the Manually Updated flag on the Merit Increase Details page when you make an adjustment. Once you've entered the appropriate merit increase, select *A — Approved* approve the increase or *N — No Increase* or *I — Ineligible* to deny it.

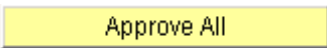
- *R — Processed*

The system selects this status when it has processed a merit increase for this employee. You cannot modify the merit increase or status for this employee.

---

**Note.** You can make manual changes to an employee's merit increase on the Merit Increase Details page before selecting a status.

---



Click to set the status from *P — Proposed* to *A — Approved*. The system does not modify the statuses *N — No Increase*, *I — Ineligible*, and *R — Processed*.

---

**Note.** You can make manual changes to an employee's merit increase on the Merit Increase Details page before approving all the merit increases.

---

## Review Merit Increase Details

Access the Merit Increase Details page.

The screenshot shows the 'Merit Increase Details' page with the following information:

- Group ID:** HXPSGRP2 (Merit Increase Group)
- Doc Type:** HXSP1 (Test SalPlan Official)
- Period End - From Date:** 01/01/2000
- Through Date:** 01/04/2000

The 'Merit Increases' table has the following details:

- EmpID:** (empty)
- Rcd#:** 0
- Name:** (empty)
- Rate Code:** (empty) with a search icon
- Manually Updated:**
- Rate Type:** (empty)
- Change Amount:** (empty) with search icons
- Change Percent:** (empty)

The 'Approval Details' section includes:

- \*Status:** (dropdown menu)
- Approval Date:** (empty)
- Approver EmpID:** (empty)
- Approver Name:** (empty)

Merit Increase Details page (1 of 2)

Job Information		
Effective Date:		Eff Seq: 0
Business Unit:		Company:
Department:		Position Number:
Job Code:	Job Title:	
Sal Plan:	Grade:	Step:
Current Comp Rate:	0.000000	
Current Annual Rate:		

Employee Review Rating		
Doc Type:	HXSP1	Test SalPlan Official
Period Begin Date:		
Period End Date:		
Review Status:		
Review Points:	0	

Merit Increase Details page (2 of 2)

**Rate Code**

If changes are necessary, select a Rate Code to associate with this Merit Increase ID. If you select a Rate Code with a Rate Code Type of:

- *Flat Amount* or *Hourly*, enter a Change Amount or a Change Percent value.
- *Percent*, enter a Change Percent and Rate Code Group (if you are using rate code groups).
- *Points*, enter Change Points and Frequency or Change Percent.

**Status**

Select the appropriate status for this employee’s merit increase (values listed under the Assign/Approve Merit Increase page). To approve the changes, select *Approve*.

## Loading Merit Increases

Access the Load Merit Increases page.

## Load Merit Increases

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

**Report Request Parameter(s)**

Group ID:

Doc Type:

Period End - From Date:

Period End - Through Date:

As Of Date:

Action:

Reason Code:   Merit

Update Future Rows  
 Don't Absorb Changes

Load Merit Increases page

- Group ID, Review Type, Period End - From Date, and Period End - Thru Date**      Select the Group ID, Review Type, and Period End From and Thru Dates of the employees whose merit increase data you want to load into the Job table.
- As Of Date**      Select the date as of which you want the merit increase to take effect.
- Action and Reason Code**      Select the action and reason associated with the merit increase for the selected employees.
- Update Future Rows**      Select to have the system update future dated rows with the merit increase.
- Don't Absorb Changes**      Select to indicate that the merit increase should not be absorbed into the salary premium (this option only applies to those rate codes with absorbing premiums).

## Reporting Merit Increases

Access the Report Merit Increases page.

## Report Merit Increases

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

**Report Request Parameter(s)**

**Group ID:**

**Doc Type:**

**Period End - From Date:**

**Period End - Through Date:**

Report Merit Increases page

**Group ID, Review Type, Period End - From Date, and Period End - Thru Date**

Select the Group ID, Review Type, and Period End From and Thru Dates of the employees whose merit increase data you want to report on.



## CHAPTER 8

# 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.

You run all these processes from the same run control page.

## Page Used to Run the Sal Plan/Paygroup Process

Page Name	Object Name	Navigation	Usage
Update by Sal Plan / Paygroup	RUNCTL_CMP008	Compensation, Salary Planning, Salary Plan Administration, Update by Plan/Paygroup	Update the job compensation rate when the salary grade or step changes retroactively.

## Updating the Job Compensation Rate

Access the Update by 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.

### 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.

### See Also

[Chapter 3, “Setting Up Plan Salaries,” Defining Salary Plan Characteristics, page 14](#)

## 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	Compensation, Salary Planning, Salary Plan Administration, Update by Job Code	Reclassify a job code.

### Reclassifying a Job Code

Access the Update by Job Code page.

Update by Job Code

---

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

Report Request Parameter(s)

Start Date: <input type="text"/> <input type="button" value="📅"/>	End Date: <input type="text"/> <input type="button" value="📅"/>	<input type="checkbox"/> Update Future Rows
Action: <input type="text"/>	Reason: <input type="text"/> <input type="button" value="🔍"/>	<input type="checkbox"/> Don't Absorb Changes

Process By

Group ID     Jobcode

Group Parameters

Group ID:

Jobcode Parameters

Business Unit: GBIBU    Global Business Institute BU

Job Code:

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 8.8 Application Fundamentals for HRMS PeopleBook*, “Updating Employee Data Using Mass Update Processes,” Understanding Mass Update Processing

*PeopleTools PeopleBook: Process Scheduler*

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## (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 8.8 Application Fundamentals for HRMS PeopleBook*, “Updating Employee Data Using Mass Update Processes,” Understanding Mass Update Processing

## Pages Used to Define Mass Pay Adjustments

Page Name	Object Name	Navigation	Usage
Mass Pay Type	GVT_MPA_TYPE_TBL	Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Define Mass Pay Adjustment USF, Mass Pay Type	Define the percentage of the pay increase and the date that the pay adjustment will go into effect. In addition, adjustment control information, such as Action, Reason Code, and NOA code data is necessary for the SF50.
Mass Pay Plan	GVT_MPA_ERNPGM_TBL	Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Define Mass Pay Adjustment USF , 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	Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Create Mass Pay Adjustment USF , 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 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.

---

## Defining a Mass Pay Type

Access the Mass Pay Type page.

Mass Pay Type	Mass Pay Plans
<b>Company:</b>	FRG Federal Reserve Board
<b>Pay Adjustment Type:</b>	FWS FWS Special Rate Increase
<b>Mass Pay Adjustment Percentage</b> <span style="float: right;">Find   View All First 1 of 2 Last</span>	
*Effective Date:	01/01/1997 <input type="button" value="📅"/> Ready <input type="button" value="+"/> <input type="button" value="-"/>
*Percentage:	2.23
<b>Action</b>	
*Action:	Pay Rate Change <input type="button" value="▼"/>
*Reason Code:	ADJ <input type="button" value="🔍"/> Adjustment
*Nature of Action Code:	894 <input type="button" value="🔍"/> Pay Adj
Authority Order No.:	<input type="text"/> <input type="text"/>

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 Plans page.

The screenshot displays the 'Mass Pay Plans' page. At the top, there are two tabs: 'Mass Pay Type' and 'Mass Pay Plans'. Below the tabs, the 'Company' is set to 'FRG Federal Reserve Board' and the 'Pay Adjustment Type' is 'FWS FWS Special Rate Increase'. The 'Mass Pay Adjustment Percentage' section shows an 'Effective Date' of '01/01/1997' and a 'Percentage' of '2.23'. The 'Mass Pay Calculation' section includes a '\*Pay Plan' of 'GS General Schedule', 'Authority (1)' of 'FGM' with 'Descr (1)' 'Reg 532.251', and 'Authority (2)' with 'Descr (3)'. The 'Calculation Type' is set to 'Pay Tables' and the 'Pay Table Action' is 'Include All for Pay Plan'. Navigation buttons like 'Find', 'View All', 'First', and 'Last' are visible at the top of each section.

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 Adjust page.



Mass Pay Adjust page

<b>Pay Adjustment Type</b>	Select the type of pay adjustment to be processed by agency. You can process multiple agencies and pay adjustment types.
<b>Percentage</b>	Specify the percentage.
<b>GVT Mass Pay Adj Process Act</b>	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 8.8 Application Fundamentals for HRMS PeopleBook*, “PeopleSoft Application Fundamentals for HRMS Reports,” Plan Salaries Reports

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Updating Employee Data Using Mass Update Processes,” Understanding Mass Update Processing

## CHAPTER 9

# (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.

## Common Elements Used to Update Japanese Salaries

<b>Language</b>	Required because, although this batch process is a load process, there may be an error list that you need to read.
<b>SetID</b>	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.
<b>Review ID</b>	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
Step Increase Table JPN	STEPINC_TBL_JPN	Compensation, Salary Planning, Step Increase JPN, Define Step Increase	Associate several salary step increases with a review band.
Load Salary Steps JPN	RUN_STEP_JPN	Compensation, Salary Planning, Step Increase 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 Step Increase Table JPN page.

Step Increase Table JPN

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

Description							Customize   Find   View All	First	1-5 of 5	Last
	*Rating Model		Short Description	*Review Rating	Short Description	Number of Steps to Increase				
1	KJ01		Japan RM	A		Vry Gd	4			
2	KJ01		Japan RM	B		Good	3			
3	KJ01		Japan RM	C		Fair	2			
4	KJ01		Japan RM	D		Poor	1			
5	KJ01		Japan RM	S		Outstn	5			

Step Increase Table JPN 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 Load Salary Steps JPN page.

Load Salary Steps JPN 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
Sal Inc Amount Table JPN page (salary increase amount table JPN)	SALINC_AMT_TBL_JPN	Compensation, Salary Planning, Amount Increase JPN, Define Salary Increase Amount	Define the salary increase amount for a particular compensation rate code and review band.
Load New Salary Amount JPN page	RUN_UPSALAMT_JPN	Compensation, Salary Planning, Amount Increase JPN, Load Salary Increase	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 Sal Inc Amount Table JPN 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*.

**Sal Inc Amount Table JPN**

**Comp Rate Code:** KJ0001

**Salary Increase Amount Table** Find | View All First 1 of 1 Last

**Description:** Base Salary Japan + -

**Currency Code:** JPY **Comp Freq:** M

**\*Effective Date:** 01/01/1980 [B] **\*Status:** Active

**Description** Customize | Find | View All First 1-5 of 5 Last

	*Rating Model	Short Description	*Review Rating	Short Description	Amount of Salary Increase		
1	KJ01	Japan RM	A	Vry Gd	18,000.000000	+	-
2	KJ01	Japan RM	B	Good	15,000.000000	+	-
3	KJ01	Japan RM	C	Fair	12,000.000000	+	-
4	KJ01	Japan RM	D	Poor	9,000.000000	+	-
5	KJ01	Japan RM	S	Outstn	20,000.000000	+	-

Sal Inc Amount Table JPN 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 Load New Salary Amount JPN page.

Load New Salary Amount JPN 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 8.8 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
Salary Increase ID Table JPN	SALINC_ID_TBL_JPN	Compensation, Salary Planning, Percentage Increase JPN, Define Salary Increase ID	Define a salary increase ID and associate a rate code—which must be of class <i>DFRPAY</i> and of type <i>Flat Amount</i> —and employee groups with it. You run the salary increase simulation by salary increase ID.
Salary Increase Matrix Table JPN	SALARY_MATRIX_JPN	Compensation, Salary Planning, Percentage Increase JPN, Define Salary Increase Matrix	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.
Generate Salary Increase Data	RUN_CMPCALC_JPN	Compensation, Salary Planning, Percentage Increase JPN, Populate Salary Increase Table	Enter the parameters for running the salary increase process and populating the Salary Increase Simulation Table.
Salary Increase Simulation JPN	SALINC_SIML_JPN	Compensation, Salary Planning, Percentage Increase JPN, Simulate Salary Increase	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.
Salary Simulation Report JPN	RUN_SALREPORT_JPN	Compensation, Salary Planning, Percentage Increase JPN, Salary Simulation Report	Run the (JPN) Salary Simulation report (CMP020JP) that displays the results of the Salary Increase Simulation process.
Load Salary Increase JPN	RUN_UP_SALINC_JPN	Compensation, Salary Planning, Percentage Increase JPN, Load Salary Increase	Update employee job compensation records with the results of the salary increase and adjustment results.

### See Also

[Chapter 3, “Setting Up Plan Salaries,” Defining a Salary Increase Matrix, page 13](#)

## Defining Salary Increase IDs

Access the Salary Increase ID Table JPN page.

Salary Increase ID Table JPN			
Salary Increase ID:	KJ01	*Description:	Salary Increase Simulation
*Calculation As Of Date:	04/01/2000	*Salary Increase Date:	04/01/2000
*SetID:	JPN01	*Review ID:	KJ02
*Comp Rate Code:	KJ0003		
*Apply Rounding At:	Units	*Rounding Rule:	Round Up

Group ID		Customize   Find   View All   [Grid Icon]		First	1 of 1	Last
*Group ID	Description					
1	KJ001	Sal Plan KJ11 Grades 6,7,8				

Salary Increase ID Table JPN 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.

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 Generate Salary Increase Data page.

Generate Salary Increase Data page

**Salary Increase ID**

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

**Calculation Number**

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

**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 Salary Increase Simulation JPN page.

Salary Increase Simulation JPN

**Salary Increase ID:** JS11
**Calculation As Of Date:** 04/01/2002
**Group ID:** J44
**Calculation Number:** 2

**Search Result Message:** 1 to 10 of 10

Sort group by:
 

EmplID
  Name

Step Increase Table							Customize   Find   View All	First	◀ 1-4 of 10 ▶	Last
Salary Details	Job Details	Amounts	Adjustments							
EmplID	Name	Empl Rcd Nbr	Comp Rate Code	Short Description	Compensation Eff Sequence					
1 J0006	Takai, Shohei	0	J01	Job Grade	0		-			
2 J0007	Nakai, Makoto	0	J01	Job Grade	0		-			
3 J0008	Kimura, Motoo	0	J01	Job Grade	0		-			
4 J0009	Doi, Masahide	0	J01	Job Grade	0		-			

Calculate Total

**Total Current Amount:** 0.000000

**Average Percent Increase:**

**Total Calculation Incr Amount:** 0.000000

**Total Calculation New Amount:** 0.000000

**Total Adjusted Amount:** 0.000000

**Adjusted Average Percent:**

**Total Actual Increase Amount:** 0.000000

**Total Actual New Amount:** 0.000000

Salary Increase Simulation JPN 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

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.

<b>Total Current Amount</b> (1)	The total of the Amount Before Salary Increase column (Amounts).
<b>Total Adjusted Amount</b> (2)	The total of the Adjustment Amount column (Adjustments).
<b>Average Percent Increase</b> (3)	The average of the Salary Increase Percent column (Amounts) (or 5/1).
<b>Adjusted Average Percent</b> (4)	The average of the Adjusted Sal Inc Percent column (Adjustments) (or 6/1).
<b>Total Calculation Incr Amount</b> (total calculation increase amount) (5)	The total of the Amount of Salary Increase column (Amounts) (or $1 \times 3$ ).
<b>Total Actual Increase Amount</b> (6)	The Total Calculation Incr (increase) Amount plus Total Adjustment Amount (or $5 + 2$ ).
<b>Total Calculation New Amount</b> (7)	The total of the New Salary Amount column (Adjustments) (or $1 + 5$ ).
<b>Total Actual New Amount</b> (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

<b>EmplID</b> (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.
<b>Name</b>	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.
<b>Empl Rcd Nbr</b> (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.
<b>Comp Rate Code</b> (compensation rate code)	The compensation rate code associated with this salary increase ID.
<b>Compensation Eff Sequence</b> (compensation effective sequence)	Displays the compensation effective sequence that comes from the employee's compensation record on the Job record.

## Amounts Tab

<b>Amount Before Salary Increase</b>	The employee's salary before the simulation was run.
<b>Review Band</b>	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.
<b>Salary Increase Percent</b>	The increase in salary, expressed as a percentage of the Amount Before Salary Increase.
<b>Amount of Salary Increase</b>	The amount by which the Amount Before Salary Increase is increased as a result of running the salary increase process.

## Adjustments Tab

<b>New Salary Amount</b>	Displays the amount of the salary after the simulated increase: the Amount Before Salary Increase (Amounts) plus the Amount of Salary Increase.
<b>Adjustment Amount</b>	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.

---

<b>Adjusted Salary Amount</b>	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.
<b>Adjusted Sal Inc Percent</b> (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.

## Running the Salary Simulation Report

Access the Salary Simulation Report JPN page.

**Salary Simulation Report JPN**

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

Language: **English**

\*Salary Increase ID:

\*Calculation Number:

**Select All Groups**

**Group ID**      [Find](#) | [View All](#)      First 1 of 1 Last

Group ID:	Description:
<input type="text"/>	

Salary Simulation Report JPN page

- Salary Increase ID**      Enter the salary increase ID you ran the simulation for and for which you want the results reported.
- Calculation Number**      Enter the calculation number of the particular simulation you want reported.
- Select All Groups**      Select this check box if you want the system to populate the Group ID section with all the groups you originally associated with this Salary Increase ID.

## Loading Salary Increases

Access the Load Salary Increase JPN page.



The screenshot shows a web interface for loading salary increase data. At the top, there is a title bar 'Load Salary Increase JPN'. Below this, there are several input fields and buttons: 'Run Control ID: test', 'Language: English' (with a dropdown arrow), and a yellow 'Run' button. There are also links for 'Report Manager' and 'Process Monitor'. A search section contains three fields: '\*Salary Increase ID:' with a search icon, '\*Calculation Number:' with a search icon, and a checkbox labeled 'Select All Groups'. At the bottom, there is a table header 'Group ID' with search and navigation controls (Find, View All, First, 1 of 1, Last) and a search icon next to the 'Group ID' field. There are also '+' and '-' buttons on the right side of the table header.

Load Salary Increase JPN 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 10

# (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 8.8 Application Fundamentals for HRMS PeopleBook*, “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.

5. Ensure all events for one scenario have the same elementary period.
6. Define your proration rules (optional).
7. Define your rates for hours worked (optional).
8. 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 8.8 Application Fundamentals for HRMS PeopleBook*, "Working With Groups"

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## Common Elements Used in This Chapter

### Period Types

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

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

<b>Periods or Periods of Comparison</b>	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.
<b>Reference Period</b>	For forecasting, this period is likely to contain the current date. For comparing past periods, use any period as a basis for comparison
<b>Analysis Period</b>	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.
<b>Elementary Period Types</b>	<p>This is how often the module processes its calculations.</p> <p>There are two elementary period types, coinciding with your possible payroll dates:</p> <ul style="list-style-type: none"> <li>• Monthly</li> <li>• Semi-monthly: more accurate but takes more processing time.</li> </ul> <p>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.</p> <p>Select the elementary period type when you define events.</p>
<b>Elementary Periods</b>	<p>The monthly or semi-monthly segments of a comparison period. Whether the segments are monthly or semi-monthly is determined by the selected elementary period type.</p> <ul style="list-style-type: none"> <li>• Past Elementary Period: any elementary period that is prior to and does not contain the current date (date of processing).</li> <li>• Current Elementary Period: The elementary period that contains the current date (date of processing).</li> <li>• Future Elementary Period: any elementary period that has its start date greater than the current date.</li> </ul> <p>The process manages the current elementary period exactly the same way it manages any past elementary period. The process manages future elementary periods by copying the data calculated for the current elementary period.</p>
<b>Triggering Period</b>	Enter the date the event is to occur (or trigger) within the analysis period.
<b>Working Periods</b>	<p>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.</p> <p>There are a few rules for the two periods associated as working periods.</p> <ul style="list-style-type: none"> <li>• The two periods must have the same period type.</li> <li>• The two periods must be contiguous: 1994 and 1995, this year and next year, this month and next month.</li> <li>• No time periods can overlap.</li> </ul>

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.

**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	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Period Setup panel	Define the time periods to compare and analyze compensation. Each time period is a Time Period ID.
Working Periods	LMS_WRK_PD_DEFN	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working period setup panel	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	
<b>Working Periods ID:</b>	2000-2001
<b>Description:</b>	Year 2000 and Year 2001
<b>Short Description:</b>	2000-2001
<b>*Reference Period:</b>	KF2000 <input type="button" value="Q"/> Year 2000 01/01/2000 / 12/31/2000
<b>*Analysis Period:</b>	KF2001 <input type="button" value="Q"/> Year 2001 01/01/2001 / 12/31/2001

Working Periods page

### Reference Period

For forecasting, select the current period –*Month, Quarter, Semester* or *Year*– depending on what period type you selected on the Period 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 8.8 Human Resources PeopleBook: Manage Variable Compensation, “Calculating Allocations and Awards”*

## Pages Used to Set Up Events

Page Name	Object Name	Navigation	Usage
Headcount Increases	LMS_ENTRIES	<ul style="list-style-type: none"> <li>• Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount increase setup panel</li> <li>• Compensation, Forecast Compensation FRA, Define Forecast Data, Headcount Increases</li> </ul>	Define a Headcount Increase event.
Simulation Parameters	LMS_ENTRIES_SEC	Click Simulation Parameters on the Headcount Increases page	Define additional parameters if the selected job code or position has compensation packages containing pay components expressed either in points or in a weekly frequency. Define the standard hours per standard work period or the points value and currency required by the calculation process for correctly handling the conversion of those pay components.
Incentives	LMS_INCENTIVES	<ul style="list-style-type: none"> <li>• Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Incentive event setup panel</li> <li>• Compensation, Forecast Compensation FRA, Define Forecast Data, Incentives</li> </ul>	Set up a future award for a group.



Page Name	Object Name	Navigation	Usage
Compensation Increase	LMS_INCREASE	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Salary Increase event setup</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Compensation Increases</li> </ul>	Define a compensation increase event.
Headcount Decrease	LMS_LEAVES	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount decrease event setup</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Headcount Decreases</li> </ul>	Define a headcount decrease event.
Promotions	LMS_PROMOTION	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Promotion event setup panel</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Promotions</li> </ul>	Simulate promotions for all people in a group.
Seniority	LMS_SENIORITY	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Seniority Setup panel</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Seniority</li> </ul>	Define a seniority event.
Working Schedule	LMS_WRK_SCHEDULE	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working Schedule event setup</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Working Schedules</li> </ul>	Use to define work weeks for the calculations.
Proration Rules	LMS_PRORATION	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Proration setup panel	Define the proration schemes.

Page Name	Object Name	Navigation	Usage
Hours Rate	LMS_HOURS_RATE	Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Hours rate setup panel	Define the overtime rates used for simulating the working schedules event. Use this page only for the Salary Forecasting calculation process.

## Simulating Headcount Increase

Access the Headcount Increases page.

Headcount Increases

**Working Periods ID:** 2000-2001      **Event ID:** KFHDINC01      **Event Type:** Headcount Increases  
**Reference Period:** KF2000      01/01/2000 / 12/31/2000  
**Analysis Period:** KF2001      01/01/2001 / 12/31/2001

**Type of Elementary**   Monthly      **Triggering Period:**    
**Period:**  
**Description:**  i

**Headcount Increase Type**

**Avg. Amnt.**   
  **JobCode**   
  **Position**

**Structure Effect**

**Group ID:**

**Number of People:**       [Simulation Parameters](#)

**Average Amount:**       **Currency:**        **Frequency:**   Monthly

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.

<b>Structure Effect</b>	Refer to Technical Details for the definition of the structure effect. To measure the structure effect, assign your headcount increase to a group.
<b>Number of People</b>	Enter the number that represents the headcount increase.
<b>Simulation Parameters</b>	Click to enter additional simulation parameters that the calculation process uses.
<b>Average Amount</b>	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 <i>1000</i> in the Average Amount field.
<b>Currency</b>	When Headcount Increase Type is Avg Amnt, select the currency that the calculation process uses.
<b>Frequency</b>	<p>When Headcount Increase Type is Avg Amnt, specify how often the new people are to be paid. During the calculation process, the frequency is converted to match the elementary period type.</p> <p>For example, the elementary period type is monthly, and you enter five new people who get 1000.00 EUR weekly. The system calculates 5000.00 EUR weekly, then converts it to a monthly frequency using the frequency annualization factor. The monthly figure is 20000.00 EUR. The calculation process adds 20000.00 EUR every month, starting with the triggering period defined for this event.</p> <p>The values come from the Frequency Table.</p>
<b>SetID</b>	When Headcount Increase Type is JobCode, specify the setID for the job code for the new hires. Values come from the SetID Table.
<b>Forecasted Job</b>	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.
<b>Forecasted Positions</b>	When Headcount Increase Type is Position, specify a forecasted position for the new hires.

## Simulating Future Awards

Access the Incentives page.

**Incentives**

---

**Working Periods ID:** 2000-2001      **Event ID:** KFINCENT01      **Event Type:** Incentives

**Reference Period:** KF2000      01/01/2000 / 12/31/2000

**Analysis Period:** KF2001      01/01/2001 / 12/31/2001

**Type of Elementary Period:**  Monthly      **Triggering Period:**

**Description:**

**Number of People:**

**Average Amount:**       **Currency:**

**Structure Effect**

**Group ID:**

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

---

**Working Periods ID:** 2000-2001      **Event ID:** KFCMPINC01      **Event Type:** Increase of component of pay

**Reference Period:** KF2000      01/01/2000 / 12/31/2000

**Analysis Period:** KF2001      01/01/2001 / 12/31/2001

**Type of Elementary Period:**  Monthly      **Triggering Period:**

**Description:**  i

**Individual Measure**

Compensation Increase Rate Codes								Customize   Find   View All	First 1 of 2 Last
Seq#	Rate Code	Percent Amount	Change Amount	Change Percent	Change Points	Percent of Points	Currency	Rate Code Class	
1	KF0005	3.00					FRF	BASSAL	+

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			
<b>Working Periods ID:</b> 2000-2001	<b>Event ID:</b> KFHDDEC	<b>Event Type:</b> Headcount Decreases	
<b>Reference Period:</b> KF2000	01/01/2000 / 12/31/2000		
<b>Analysis Period:</b> KF2001	01/01/2001 / 12/31/2001		
<b>Type of Elementary Period:</b> <input type="text" value="M"/> Monthly	<b>Triggering Period:</b> <input type="text" value="09/01/2001"/>		
<b>Description:</b>	<input type="text" value="Headcount Decrease in September"/>		

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			
<b>Working Periods ID:</b> 2000-2001	<b>Event ID:</b> KFPROM01	<b>Event Type:</b> Promotion	
<b>Reference Period:</b> KF2000	01/01/2000 / 12/31/2000		
<b>Analysis Period:</b> KF2001	01/01/2001 / 12/31/2001		
<b>Type of Elementary Period:</b> <input type="text" value="M"/> Monthly	<b>Triggering Period:</b> <input type="text" value="06/01/2001"/>		
<b>Description:</b>	<input type="text" value="Promotion from Assistant to Senior Assistant"/>		
<b>From</b>			
<b>SetID:</b> <input type="text" value="FRA01"/>	<b>Job Code:</b> <input type="text" value="KF0010"/>		
<b>To</b>			
<b>SetID:</b> <input type="text" value="FRA01"/>	<b>Job Code:</b> <input type="text" value="KF0009"/>		

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

---

**Working Periods ID:** 2000-2001      **Event ID:** KFSEN01      **Event Type:** Seniority

**Reference Period:** KF2000      01/01/2000 / 12/31/2000

**Analysis Period:** KF2001      01/01/2001 / 12/31/2001

**Description:**

**Seniority Calculation Freq.:**

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

---

**Working Periods ID:** 2000-2001      **Event ID:** KFWRK01      **Event Type:** Working Schedule

**Reference Period:** KF2000      01/01/2000 / 12/31/2000

**Analysis Period:** KF2001      01/01/2001 / 12/31/2001

**Type of Elementary Period:**  Monthly      **Triggering Period:**

**Description:**

**Standard Hours:**

**Frequency:**  Weekly

Working Schedule page

**Standard Hours**

Enter the number of standard hours per frequency period. For example, 35 hours is standard hours for a weekly frequency.

To simulate the 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**

---

**Time Period ID:** KF2000      **Period Type:** Year      **Type of Elementary Period:** Monthly

12 Months   
  13 Months   
  14 Months   
  15 Months

<b>1st Month:</b> <input type="text" value="13"/> / 13	<b>7th Month:</b> <input type="text" value="7"/> / 13
<b>2nd Month:</b> <input type="text" value="12"/> / 13	<b>8th Month:</b> <input type="text" value="6"/> / 13
<b>3rd Month:</b> <input type="text" value="11"/> / 13	<b>9th Month:</b> <input type="text" value="5"/> / 13
<b>4th Month:</b> <input type="text" value="10"/> / 13	<b>10th Month:</b> <input type="text" value="4"/> / 13
<b>5th Month:</b> <input type="text" value="9"/> / 13	<b>11th Month:</b> <input type="text" value="3"/> / 13
<b>6th Month:</b> <input type="text" value="8"/> / 13	<b>12th Month:</b> <input type="text" value="2"/> / 13

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

**Hours Rate Effective Date:** 01/01/2000

Hours Rates						
*Sequence	From	To	*Frequency	*Rate (%)		
1	0.00	35.00	W <input type="text" value="Q"/>	100.00	<input type="button" value="+"/>	<input type="button" value="-"/>
2	35.00	43.00	W <input type="text" value="Q"/>	125.00	<input type="button" value="+"/>	<input type="button" value="-"/>
3	43.00	168.00	W <input type="text" value="Q"/>	150.00	<input type="button" value="+"/>	<input type="button" value="-"/>

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	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Scenarios</li> </ul>	Define scenarios. You associate a working periods ID with a group and a set of events.
Structure Effect	LMS_SCENAR_CTG	<ul style="list-style-type: none"> <li>Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel</li> <li>Compensation, Forecast Compensation FRA, Define Forecast Data, Scenarios</li> </ul>	Define the groups used to assess the Structure Effect.

## Associating Events with a Scenario

Access the Scenario Definition page.

Scenario Definition
Structure Effect

**Scenario ID:** KFSCEN01

**\*Group ID:**  All employees in Company KF1

**\*Working Periods ID:**  Year 2000 and Year 2001

**Description:**

Scenario Events								Customize   Find   View All
Select	Event ID		Detail	Triggering Period	Group ID	Def.	Description	
<input checked="" type="checkbox"/>	KFSEN01	Seniority	<a href="#">Detail</a>		<input type="text" value="KF0006"/>	<a href="#">Def.</a>	Seniority Calculation	
<input checked="" type="checkbox"/>	KFWRK01	Schedule	<a href="#">Detail</a>	01/01/2001	<input type="text" value="KF0006"/>	<a href="#">Def.</a>	From 39 hours to 35 hours	
<input checked="" type="checkbox"/>	KFHDINC01	H Increase	<a href="#">Detail</a>	04/01/2001		<a href="#">Def.</a>	Hire of 10 technicians	
<input checked="" type="checkbox"/>	KFPROM01	Promotion	<a href="#">Detail</a>	06/01/2001	<input type="text" value="KF0006"/>	<a href="#">Def.</a>	Promotion from Assistant to Senior Assistant	

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 Detail to go to the Event Definition page to make adjustments to an event. Click Def 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.

Scenario ID: KFSCEN01		Scenario Structure Effect Groups		Customize	Find	View All	First	1-6 of 6	Last
*Group ID	Description								
KF0006	All employees in Company KF1	<input type="checkbox"/>	<input type="checkbox"/>						
KF001	Executives in Company KF1	<input type="checkbox"/>	<input type="checkbox"/>						
KF002	Managers in Company KF1	<input type="checkbox"/>	<input type="checkbox"/>						
KF003	Technicians in Company KF1	<input type="checkbox"/>	<input type="checkbox"/>						
KF004	Qualified Wkers in Company KF1	<input type="checkbox"/>	<input type="checkbox"/>						
KF005	Non Qual Wkers in Company KF1	<input type="checkbox"/>	<input type="checkbox"/>						

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

[Chapter 10, “\(FRA\) Forecasting Salaries for France,” Technical Details: Compensation Effects, page 141](#)

[Chapter 10, “\(FRA\) Forecasting Salaries for France,” Technical Details: Categorization of Events, page 142](#)

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## 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	LMS_RUN_CNTL_PNL	Compensation, Forecast Compensation FRA, Process Forecast, Forecast Compensation	Initiates compensation forecasting based on specified criteria.
Report Forecasted Compensation	RUNCTL_LMS_REPORT	Compensation, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt	Report on compensation scenarios.
Scenario Comparison	RUNCTL_LMS_REPORT	Compensation, Forecast Compensation FRA, Process Forecast, Scenario Compensation Rpt	Define forecasted compensation and compare scenarios.
Rate Code without class	RUNCTL_LMS_RATE_CL	Compensation, Forecast Compensation FRA, Process Forecast, rate Codes w/out Class Rpt	Reports on rate codes that don't have a rate code class attached to them.

## Forecasting Compensation

Access the Compensation Forecasting page

Compensation Forecasting

Run Control ID: 123 [Report Manager](#) [Process Monitor](#) Run

Language: English ▼

\*Scenario ID:  🔍

\*Currency:  🔍 [Scenario Definition](#)

Fixed Exchange Rate    As Of Date:     \*Rate Type:  🔍  
 Re-Extraction  
 Structure Effect

Carry-Over Factor:     \*Type of Elementary Period:  🔍

Compensation Forecasting page

- Scenario ID**                      Select a scenario ID.
- Scenario Definition**        Click to go to the Scenario Definition page of the selected scenario ID.
- Fixed Exchange Rate**        Select if this currency has a fixed exchange rate.
- Re-Extraction**                Select if this process is re-extracting the base compensation from the Human Resource database.

- Structure Effect** Select if the variance in the overall compensation is due to internal moves within the organization.
- Rate Type** Select a compensation rate type.
- Carry-Over Factor** The carry over effect represents the impact on a given period of all the measures taken during the previous period. Indicate what will be carried over to the next period.

## Running a Compensation Simulation

Access the Report Forecasted Compensation page.

**Report Forecasted Compensation**

Run Control ID: GN2      Report Manager    Process Monitor    Run

Language: English

**Scenario Filter**

User ID: PS      Run Control ID:      Refresh

**Scenario History Report**      Customize | Find | View All | First 1 of 1 Last

Select	Scenario ID	Scenario Run DateTime	User ID	Run Control ID	Description
<input checked="" type="checkbox"/>					

Report Forecasted Compensation page

Select a User ID and a Run Control ID, then click the Refresh button. Refreshing populates the Scenario History Report group box. Select the check box for the Scenario ID you wish to report on and click Run.

### See Also

[Chapter 10, “\(FRA\) Forecasting Salaries for France,” Technical Details: Compensation Effects, page 141](#)

[Chapter 10, “\(FRA\) Forecasting Salaries for France,” Technical Details: Categorization of Events, page 142](#)

*PeopleTools PeopleBook: Process Scheduler*

## Running the Scenario Comparison Report

Access the Scenario Comparison page.

Scenario Comparison page

**Scenario Filter**

This group box enables you to narrow the choice of scenarios to report by User ID and Run Control ID.



Click to display scenarios that meet the scenario filter requirements.

**Scenario History Report**

This group box displays all scenarios that meet the scenario filter requirements. Scenarios are listed by Scenario ID, Scenario Run DateTime, User ID, Run Control ID, and Description.

To run one scenario at a time, select this check box.

## Purging Scenario History

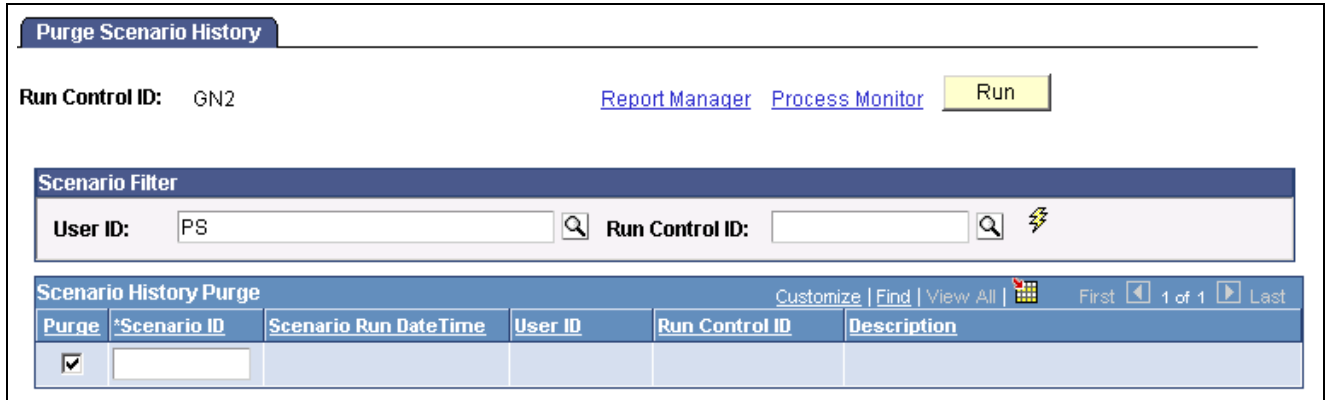
All the results from of the calculation of any scenario are stored in the database. Define several scenarios with different sets of events, run the calculation for all scenarios, and compare the results. Then select the scenario that best mirrors your compensation policy. You may then purge from the database the results of some scenario calculations you 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	Compensation, Forecast Compensation FRA, Process Forecast, 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.

## 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 Name	Navigation	Usage
Scenario History	LMS_SCENAR_HISTORY	Compensation, Forecast Compensation FRA, Process Forecast, Review Scenario History	Inquire about the process history of scenarios.
Scenario History Details	LMS_SCENARHIST_SEC	Click Information on the Scenario History 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
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											

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
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 11

## Viewing and Reporting Summary Salary Data

In this chapter, we discuss summary salary data and how to:

- View compensation history.
- Run reports of compensation changes.
- View employee ranking.
- View job evaluations.

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### 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 History	COMP_SUMMARY	Compensation, Salary Planning, Review Salary Information, Employee 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.
Comp Rate Code	COMP_RATECD5_SEC	Click Details on the Compensation History: Amounts page.	View additional information about the compensation rate code from the Comp Rate Code Table.

## Viewing a Compensation Summary

Access the Compensation History page.

Compensation History									
BARET,Fabien			<b>EmplID:</b>	GN100ME338	<b>Empl Rcd#:</b>	0			
<b>Company:</b>	GN3		<b>Job Code:</b>	Ctl Jun	<b>Hire Date:</b>	01/01/2002			
<b>Business Unit:</b>	The Netherlands		<b>Location:</b>	GNROT01	<b>Community:</b>	<b>Country:</b>	NLD		
<b>Department:</b>	The Netherlands Dept PR003		<b>Sup Lvl ID:</b>						
Compensation									
Find   View All First									
<b>Effective Date:</b>	01/01/2002	<b>Seq:</b>	0	<b>Action:</b>	Hire	<b>Action Reason:</b>			
<b>Salary SetID:</b>	GN001	<b>Plan:</b>		<b>Grade:</b>		<b>Grade Entry Date:</b>			
				<b>Step:</b>		<b>Yrs Grade:</b>			
<b>Comp Rate:</b>	6,000.00		EUR	<b>Frequency:</b>	Monthly	<b>Month Last Incr:</b>			
<b>Change Amount:</b>	0.00		EUR	<b>Change Percent:</b>	0.000	<b>Compa-Ratio:</b> 0.00			
<b>Annual Rate:</b>	72,000.00		EUR			<b>% Range:</b> 0.0			
Pay Components									
Amounts			Changes			Conversion			
Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group	
KN0001	0	<a href="#">Details</a>	6,000.00	EUR	Monthly				

Compensation History page

For each salary change the system displays the following data from the employee's job and compensation records:

<b>Month Last Increase</b> (number of months)	The number of months since the last increase.
<b>Seq</b> (sequence)	The sequence number of the salary change action.
<b>Action and Reason</b>	The action and reason that resulted in a salary change.
<b>Comp Rate</b> (compensation rate) and <b>Frequency</b>	The employee's compensation rate as of this effective date, sequence, action, and reason along with the frequency with which it is paid.
<b>Annual Rate</b>	The employee's new annual rate as of this effective date, sequence, action, and reason.
<b>Rating</b>	The employee's review rating.
<b>Change Amount</b>	The amount of the employee's increase for this effective date, sequence, action, and reason.
<b>Change Percent</b>	The percent increase for this effective date, sequence, action, and reason.
<b>Plan, Grade, and Step</b>	The employee's salary administration plan, salary grade, and salary step for this effective date, sequence, action, and reason.
<b>Grade Entry Date</b>	The date the employee entered the grade.

- 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 8.8 Human Resources PeopleBook: Administer Compensation*, “Setting Up Administer Compensation,” Defining Rate Codes

Chapter 4, “Administering Salary Plans, Grades, and Steps,” Viewing Compa-Ratios, page 40

Chapter 4, “Administering Salary Plans, Grades, and Steps,” Viewing Range Calculations, page 40

## Running Compensation Change Reports

This section explains how to generate:

- Compensation history reports for an employee, group, or company.
- Lists of employees who have received compensation rate changes or merit increases within a specified period.
- Lists of employees who have not received a merit increase within a specified period.

### Pages Used to Run Compensation Change Reports

Page Name	Object Name	Navigation	Usage
Salary History by Employee	RUNCTL_CMP011	Compensation, Salary Planning, Compensation Reports, Salary History By Employee	Print the Salary History by Employee report (CMP011). This report displays each salary change for an employee during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.

Page Name	Object Name	Navigation	Usage
Salary History by Group	RUNCTL_CMP014	Compensation, Salary Planning, Compensation Reports, Salary History By Group	Run the Salary History by Group report (CMP014). This report provides the salary changes for the employees in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.
Salary History for Company	RUNCTL_PER023	Compensation, Salary Planning, Compensation Reports, Salary History By Company	Run the Salary History for Company report (PER023) that displays each salary change for an employee during a specified time period.
EE Compensation Changes	RUNCTL_PER013	Compensation, Salary Planning, Compensation Reports, Employee Compensation Changes	Run the Employee Compensation Changes report (PER013) that lists employees who have had compensation rate changes within a selected time period.
Merit Increase	RUNCTL_PER041	Compensation, Salary Planning, Compensation Reports, Merit Increase Report	Use this page to run these reports: <ul style="list-style-type: none"> <li>• Employee With Merit report (PER041). This lists all employees who have received a merit increase during the period entered on the parameter page.</li> <li>• Employee Without Merit report (PER042). This lists all employees who have not received a merit increase during the period entered on the parameter page.</li> </ul>

### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “PeopleSoft Application Fundamentals for HRMS Reports,” PER041 - Employee With Merit – Plan Salaries



## 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.

---

**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.

---

## Pages Used to View Employee Ranking

Page Name	Object Name	Navigation	Usage
Employee Ranking by Job Code	JOB_RANKING	Compensation, Salary Planning, Review Salary Information, Employee Ranking by Job Code	View how employees rank in terms of compensation within a job code.
Salary Components	COMP_EMPL_RANK_SEC	Click Component Details on the Employee Ranking by Job Code 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 Details on the Salary Components page.	Review detail information on a specific rate code.
Ranking by Job Code - No Name	JOB_RANKING_NO_EE	Compensation, Salary Planning, Review Salary Information, Anonymous Ranking	View how employees rank in terms of compensation within a job code. To protect privacy, employee identification does not appear on the page.

## Viewing Employee Ranking in Terms of Compensation

Access the Employee Ranking by Job Code page.

Employee Ranking by Job Code						
<b>SetID:</b>	SHARE	<b>Job Code:</b>	120000 Administrator			
<b>Manager Level:</b>	Other	<b>Job Function:</b>				
<b>Job Family:</b>		<b>Midpoint Rate:</b>				
<b>Salary SetID:</b>	SHARE	<b>Plan/Grade/Step:</b>	0000 00			
Current Annual Ranges						
<b>SetID</b>	<b>Sal Plan</b>	<b>Grade Step</b>	<b>Min/Annual</b>	<b>Midpt/Annual</b>	<b>Max/Annual</b>	<b>Currency Co Code</b>
			0.000	0.000	0.000	
Compensation Ranking						
Work Location		Ratios				
<b>EmpID</b>	<b>Name</b>	<b>Annual Rate</b>	<b>Company</b>	<b>Location</b>		
1		0.000				

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.



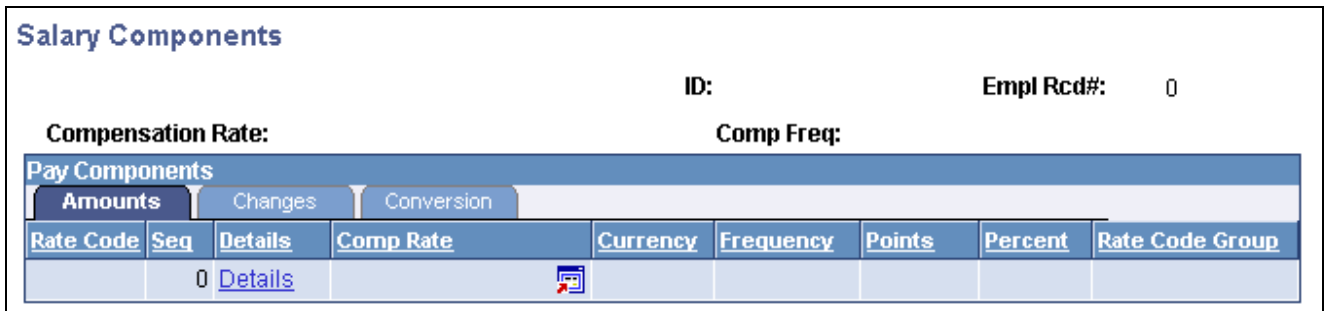
Click Component Details to access the Salary Components page, where you can view employees' compensation details by pay component.

### See Also

*PeopleSoft 8.8 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						
<b>SetID:</b>	SHARE	<b>Job Code:</b>	120000 Administrator			
<b>Manager Level:</b>	Other	<b>Job Function:</b>				
<b>Job Family:</b>		<b>Midpoint Rate:</b>				
<b>Salary SetID:</b>	SHARE	<b>Plan/Grade/Step:</b>	0000 00			
Current Annual Ranges						
Find   View All   First 1 of 1 Last						
SetID	Plan	Grade	Min/Annual	Midpt/Annual	Max/Annual	Currency: Co
			0.000	0.000	0.000	
Compensation Ranking						
Customize   Find   First 1 of 1 Last						
Work Location		Ratios				
Annual Rate	Grade Date	Yrs Grade	Company	Location		
\$0.000		0.0				

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

Chapter 11, "Viewing and Reporting Summary Salary Data," Pages Used to View Employee Ranking, page 149

## 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.

**Note.** The Manage Performance business process in PeopleSoft Human Resources also uses the Job Evaluation by Grade page.

### Pages Used to View Job Evaluations by Grade

Page Name	Object Name	Navigation	Usage
Job Evaluations by Grade	JOB_EVALUATIONS	Compensation, Salary Planning, Review Salary Information, Job Evaluations by Grade	Compare job evaluation criteria among job codes within a salary plan and grade.
Job Evaluations by Grade	GVT_JOB_EVALUATIONS	Compensation, Salary Planning, Review Salary Information, Job Evaluations by Grade USF	Compare job evaluation criteria among job codes within a salary plan and grade.

### (GBL) (USF) Comparing Job Evaluation Criteria

Access the Job Evaluations by Grade page.

**Job Evaluations by Grade**

---

**SetID:** SHARE

**Salary Administration Plan:** KC01 CDN Salary Administration Plan

**Salary Grade:** 001 Standard Pay Grade 1

**Current Annual Ranges**

<b>Minimum:</b>	11,142.44	<b>Midpoint:</b>	15,596.80	<b>Maximum:</b>	20,051.16	CAD
-----------------	-----------	------------------	-----------	-----------------	-----------	-----

**Job Evaluation**

SetID	Job Code	Short Descr	Total Points	Job Function	Manager Level	Knowhow	Accountability	Problem-Solving

Job Evaluations by Grade

#### 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**

[Chapter 4, “Administering Salary Plans, Grades, and Steps,” Understanding Salary Grades and Steps, page 32](#)

# Glossary of PeopleSoft Terms

<b>absence entitlement</b>	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>account</b>	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
<b>accounting class</b>	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
<b>accounting date</b>	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
<b>accounting entry</b>	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
<b>action reason</b>	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
<b>activity</b>	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
<b>allocation rule</b>	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
<b>alternate account</b>	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
<b>application agent</b>	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attachment</b>	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
<b>background process</b>	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
<b>budget period</b>	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
<b>business event</b>	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
<b>catalog item</b>	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
<b>category</b>	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
<b>ChartField</b>	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.



<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>child</b>	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
<b>Class ChartField</b>	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
<b>clone</b>	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
<b>collection</b>	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
<b>compensation object</b>	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>configuration parameter catalog</b>	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
<b>configuration plan</b>	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
<b>content reference</b>	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
<b>context</b>	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
<b>corporate account</b>	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
<b>cost profile</b>	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.

<b>data acquisition</b>	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
<b>data elements</b>	Data elements, at their simplest level, define a subset of data and the rules by which to group them.  For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
<b>data row</b>	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
<b>data validation</b>	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
<b>DAT file</b>	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
<b>delivery method</b>	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
<b>delivery method type</b>	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
<b>distribution</b>	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
<b>double byte character</b>	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
<b>dynamic tree</b>	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
<b>edit table</b>	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
<b>effective date</b>	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
<b>EIM job</b>	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>equipment</b>	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

<b>event</b>	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
<b>event propagation process</b>	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
<b>external system</b>	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
<b>fact</b>	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
<b>filter</b>	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
<b>generic process type</b>	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
<b>group</b>	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
<b>homepage</b>	Users can personalize the homepage, or the page that first appears when they access the portal.
<b>incentive object</b>	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
<b>incentive rule</b>	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
<b>key</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>learner group</b>	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
<b>learning activity</b>	See <i>activity</i> .
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
<b>learning plan</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

<b>level</b>	A section of a tree that organizes groups of nodes.
<b>library section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
<b>linked section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
<b>linked variable</b>	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
<b>load</b>	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
<b>local functionality</b>	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
<b>location</b>	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
<b>market template</b>	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
<b>material</b>	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
<b>message definition</b>	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
<b>meta-SQL</b>	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
<b>metastring</b>	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>objective</b>	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
<b>override</b>	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
<b>pagelet</b>	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

<b>parent node</b>	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects.  See also <i>participant object</i> .
<b>payout</b>	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
<b>PeopleCode</b>	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
<b>performance measurement</b>	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
<b>period context</b>	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
<b>per seat cost</b>	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
<b>plan</b>	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
<b>plan context</b>	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
<b>plan section</b>	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
<b>plan template</b>	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
<b>portal registry</b>	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
<b>private view</b>	A user-defined view that is available only to the user who created it.
<b>process</b>	See <i>Batch Processes</i> .
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
<b>process job</b>	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
<b>process request</b>	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
<b>process run control</b>	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
<b>product category</b>	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>record definition</b>	A logical grouping of data elements.
<b>record field</b>	A field within a record definition.
<b>record group</b>	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
<b>reference data</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>reference object</b>	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
<b>reference transaction</b>	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>results management process</b>	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
<b>role user</b>	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
<b>role</b>	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>routing</b>	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
<b>run control</b>	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.
<b>run-level context</b>	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
<b>search query</b>	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
<b>section</b>	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>self-service application</b>	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
<b>session</b>	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
<b>session template</b>	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>sibling</b>	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
<b>single signon</b>	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
<b>source transaction</b>	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
<b>SpeedChart</b>	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>SQR</b>	See <i>Structured Query Report (SQR)</i> .
<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>Structured Query Report (SQR)</b>	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
<b>Summary ChartField</b>	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
<b>summary ledger</b>	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.



<b>table</b>	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
<b>TableSet sharing</b>	Specifies control table data for each business unit so that redundancy is eliminated.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>template</b>	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>TimeSpan</b>	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
<b>transaction allocation</b>	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
<b>transaction loading process</b>	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
<b>transaction state</b>	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
<b>transaction type</b>	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
<b>Translate table</b>	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
<b>tree</b>	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
<b>unclaimed transaction</b>	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
<b>uniform resource locator (URL)</b>	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&amp;ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
<b>universal navigation header</b>	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

**URL**

See *uniform resource locator (URL)*.

**user interaction object**

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

**variable**

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

**warehouse**

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

**worksheet**

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

**workflow**

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

**worklist**

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

**zero-rated VAT**

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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