PeopleSoft®

# PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting

**April 2005**

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting
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# About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

**Note.** PeopleBooks document only page elements, such as fields and check boxes, 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.

## 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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.

## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

**Note.** Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

# Documentation Updates and Printed 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.

**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.

### See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

## 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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

### Telephone

Contact MMA Partners at 877 588 2525.

### Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

### See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

## Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

| Resource | Navigation |
|---|---|
| Application maintenance information | Updates + Fixes |
| Business process diagrams | Support, Documentation, Business Process Maps |
| Interactive Services Repository | Interactive Services Repository |
| Hardware and software requirements | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements |
| Installation guides | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes |
| Integration information | Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications |
| Minimum technical requirements (MTRs) (EnterpriseOne only) | Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms |
| PeopleBook documentation updates | Support, Documentation, Documentation Updates |
| PeopleSoft support policy | Support, Support Policy |
| Prerelease notes | Support, Documentation, Documentation Updates, Category, Prerelease Notes |
| Product release roadmap | Support, Roadmaps + Schedules |
| Release notes | Support, Documentation, Documentation Updates, Category, Release Notes |

| Resource | Navigation |
|---|---|
| Release value proposition | Support, Documentation, Documentation Updates, Category, Release Value Proposition |
| Statement of direction | Support, Documentation, Documentation Updates, Category, Statement of Direction |
| Troubleshooting information | Support, Troubleshooting |
| Upgrade documentation | Support, Documentation, Upgrade Documentation and Scripts |

# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

## Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

| Typographical Convention or Visual Cue | Description |
|---|---|
| **Bold** | Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| *Italics* | 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.<br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| `Monospace font` | Indicates a PeopleCode program or other code example. |

| Typographical Convention or Visual Cue | Description |
|---|---|
| “ ” (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) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br>Ampersands also precede all PeopleCode variables. |

# 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.

If the note is preceded by *Important!,* the note 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.

***Warning!*** Example of a warning.

## Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

## Currency Codes

Monetary amounts are identified by the ISO currency code.

# 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.

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

# Common Elements Used in PeopleBooks

| | |
|---|---|
| **As of Date** | The last date for which a report or process includes data. |
| **Business Unit** | 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. |
| **Description** | Enter up to 30 characters of text. |
| **Effective Date** | 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. |
| **Once, Always,** and **Don't Run** | 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.<br>Select Always to run the request every time the batch process runs.<br>Select Don't Run to ignore the request when the batch process runs. |
| **Process Monitor** | Click to access the Process List page, where you can view the status of submitted process requests. |
| **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). |
| **Request ID** | An ID that represents a set of selection criteria for a report or process. |
| **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. |
| **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. |
| **User ID** | An ID that represents the person who generates a transaction. |

# PeopleSoft Human Resources Manage Base Compensation and Budgeting Preface

This preface discusses:

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

**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.

## PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Manage Base Compensation and Budgeting.

## PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting* provides you with implementation and processing information for your PeopleSoft Human Resources Base Compensation and Budgeting system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook* consists of important topics that apply to many or all PeopleSoft Enterprise applications across the PeopleSoft HRMS product line. No matter which PeopleSoft Enterprise 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

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

## PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

| Chapters | Description |
|---|---|
| Preface | This is the chapter you're reading now. It explains:<br>• How to use the Application Fundamentals book.<br>• How PeopleBooks are structured.<br>• Common elements used in the PeopleBook, if necessary. |
| Getting Started With… | This chapter discusses product implementation guidelines. It explains:<br>• The business processes documented within the book.<br>• Integrations between the product and other products.<br>• A high-level documentation 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. |
| Navigation | (Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages.<br>**Note.** Not all applications have delivered custom navigation pages. |
| Understanding… | (Optional) This is an introductory chapter that broadly explains the product and the functionality within the product. |

| Chapters | Description |
| --- | --- |
| Setup and Implementation | 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.<br><br>**Note.** 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. |
| Business Process | 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.<br><br>**Note.** 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. |
| 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. |
| Delivered Workflow Appendix | (Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.<br><br>**Note.** Not all applications have delivered workflows. |
| 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. |

# Common Elements Used in This PeopleBook

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

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

| | |
|---|---|
| **Salary Plan** | When used without further qualification, this term generally refers to a salary administration plan.<br><br>In the “Budgeting and Planning Salary Increases” chapter of this documentation, salary increase plans are sometimes referred to as salary plans. |

# CHAPTER 1

# Getting Started With Base Compensation and Budgeting

This chapter provides an overview of Base Compensation and Budgeting business processes and discusses:

- Base Compensation and Budgeting integrations.
- Base Compensation and Budgeting implementation tasks.

## Base Compensation and Budgeting Business Processes

The following are the processes for Base Compensation and Budgeting:

- Salary administration plans.
- Budgeting and planning salary increases.
- (FRA) Forecasting salaries for France.
- (JPN) Updating salaries for Japan.
- Processing mass salary increases.
- Reviewing worker 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.

## Base Compensation and Budgeting Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Base Compensation also provides component interfaces to help you load data from your existing system into Base Compensation tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the component that has a setup component interface:

| Component | Component Interface | References |
|---|---|---|
| COMP_RATECD_TBL | CI_COMP_RATECD_TBL | See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Setting Up Administer Compensation," Setting Up Rate Codes. |
| JOB_CODE_TBL | CI_JOB_CODE_TBL | See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Jobs," Defining Job Function Codes. |
| LOCATION_TABLE | LOCATION_TABLE | See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Establishing Locations. |
| SALARY_GRADE_TBL | SALARY_GRADE_TBL | See Chapter 3, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps, page 14. |

## Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

## See Also

*PeopleTools PeopleBook: PeopleSoft Component Interfaces*

*PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook*

# CHAPTER 2

# Understanding Base Compensation and Budgeting

This chapter provides an overview of Base Compensation and Budgeting and discusses:

- Base Compensation and Budgeting business processes.
- Base Compensation and Budgeting integrations.
- Designing your salary planning program.

## Base Compensation and Budgeting

Base Compensation and Budgeting enables you to calculate budgets, set up your basic salary planing system architecture and manually apply salary data to worker records.

### Prerequisites

Before you begin planning worker salaries, make sure control table data and worker job data exists in PeopleSoft Enterprise 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 worker 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.
- (Optional) Create configurable matrices if you want to use a salary increase matrix to calculate a budget.

#### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Delivered Workflows for PeopleSoft HRMS," Creating Role Users Using a Message Agent

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS"

Chapter 5, "Using Configurable Matrices," page 49

# Base Compensation and Budgeting Business Processes

Base Compensation and Budgeting supports the following business processes.

## Salary Administration Plans

Using the Base Compensation and Budgeting business process, you can create salary administration plans to assign default compensation packages to workers at the location, job code, or worker level. Use these salary plans to move workers 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 worker compensation packages.
3. (Optional) Enter salary raises using the Automated Step Increase process.
4. View salary structures and generate reports.

## Base Compensation Budgets and Plans

You can create base compensation budgets for groups of workers by defining increases for pay components. The system calculates the increase for all workers 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 workers in the group. Manually adjust individual worker'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 workers' Job Data records where they take effect on the effective date of the budget or the worker'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 worker compensation and manually adjusting individual increases.
5. Approve the salary increase budget and plan.
6. Populate worker records with the approved increases.

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

### See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," page 7

Chapter 7, "Budgeting and Planning Salary Increases," page 109

### Mass Salary Increase Processes to Update Salaries

In the Base Compensation and Budgeting 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.

### Summary Data and Reports

Base Compensation and Budgeting inquiry pages and reports provide the following types of summary information:

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

## Base Compensation and Budgeting Integrations

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

Human Resources shared tables are available to many 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.

Base Compensation and Budgeting integrates with PeopleSoft Enterprise Payroll for North America (sends data).

We cover integration considerations in this PeopleBook.

## Designing Your Base Compensation Program

The core of Base Compensation and Budgeting 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 workers to salary plans.

Once your Base Compensation and Budgeting 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, Base Compensation and Budgeting 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

## Administering Salary Plans

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

# CHAPTER 3

# Setting Up Base Compensation and Budgeting

This chapter describes how to:

- Define salary increase guidelines using a configurable matrix.
- Set up salary plans, grades and steps.
- Set up salary increase budgeting and planning.
- Run salary grades and salary steps reports.

## Defining Salary Increase Guidelines Using a Configurable Matrix

To define salary increase guidelines using a configurable matrix, use the Define Sources (WCS_SOURCE_DEFN), Define Results (WCS_RESULT_DEFN), and Define Matrices (WCS_LK_TBL_DEFN) components.

This section discusses how to:

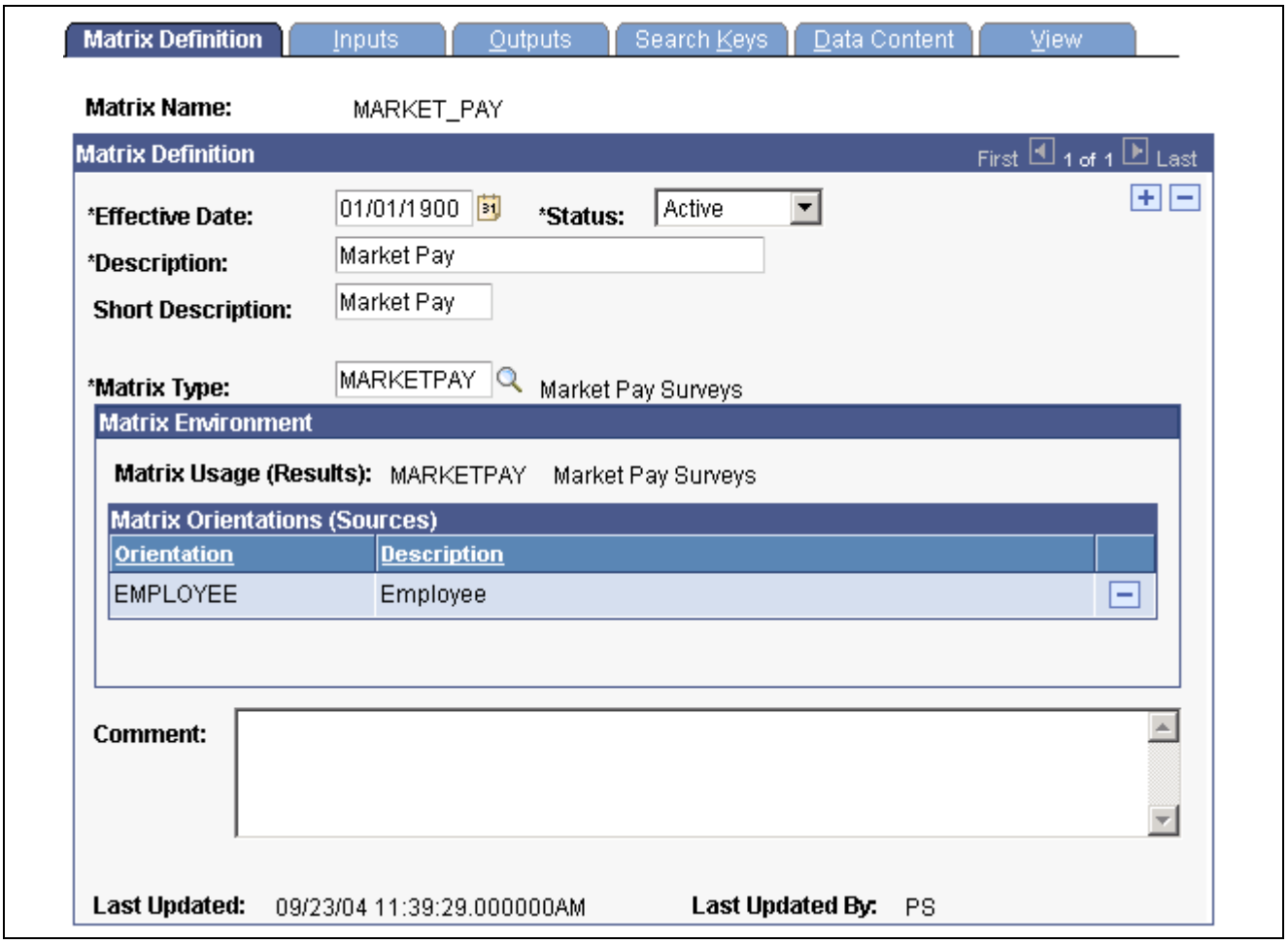
- Define a salary increase matrix using a configurable matrix.
- Define inputs for salary increase guidelines.
- Define outputs for salary increase guidelines.
- Define search keys.
- Define data content.
- View matrix results.

## Pages Used to Define Salary Increase Guidelines Using a Configurable Matrix

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Inputs | WCS_LK_TBL_INPUTS | Setup HRMS, Common Definitions, Configurable Matrices, Matrix Definition, Inputs | Define inputs for the salary increase guidelines. |
| Outputs | WCS_LK_TBL_OUTPUTS | Setup HRMS, Common Definitions, Configurable Matrices, Matrix Definition, Outputs | Define outputs for the salary increase guidelines. |
| Search Keys | WCS_LK_TBL_KEYS | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys | Specify the search keys to be used to match worker data used in salary increase guidelines. |
| Load Configurable Matrix Keys | WCS_LK_TBL_KEY_SEC | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys<br>Click the Load Values from Prompt link. | Automatically load search keys for specific sources using a prompt table. |
| Data Content | WCS_LK_TBL_DATA | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content | Enter values for the output data. |
| View | WCS_LK_TBL_VIEW | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View | View the matrix as of the *last* saved version. |

## Defining a Salary Increase Matrix Using a Configurable Matrix

Access the Matrix Definition page.




Matrix Definition page

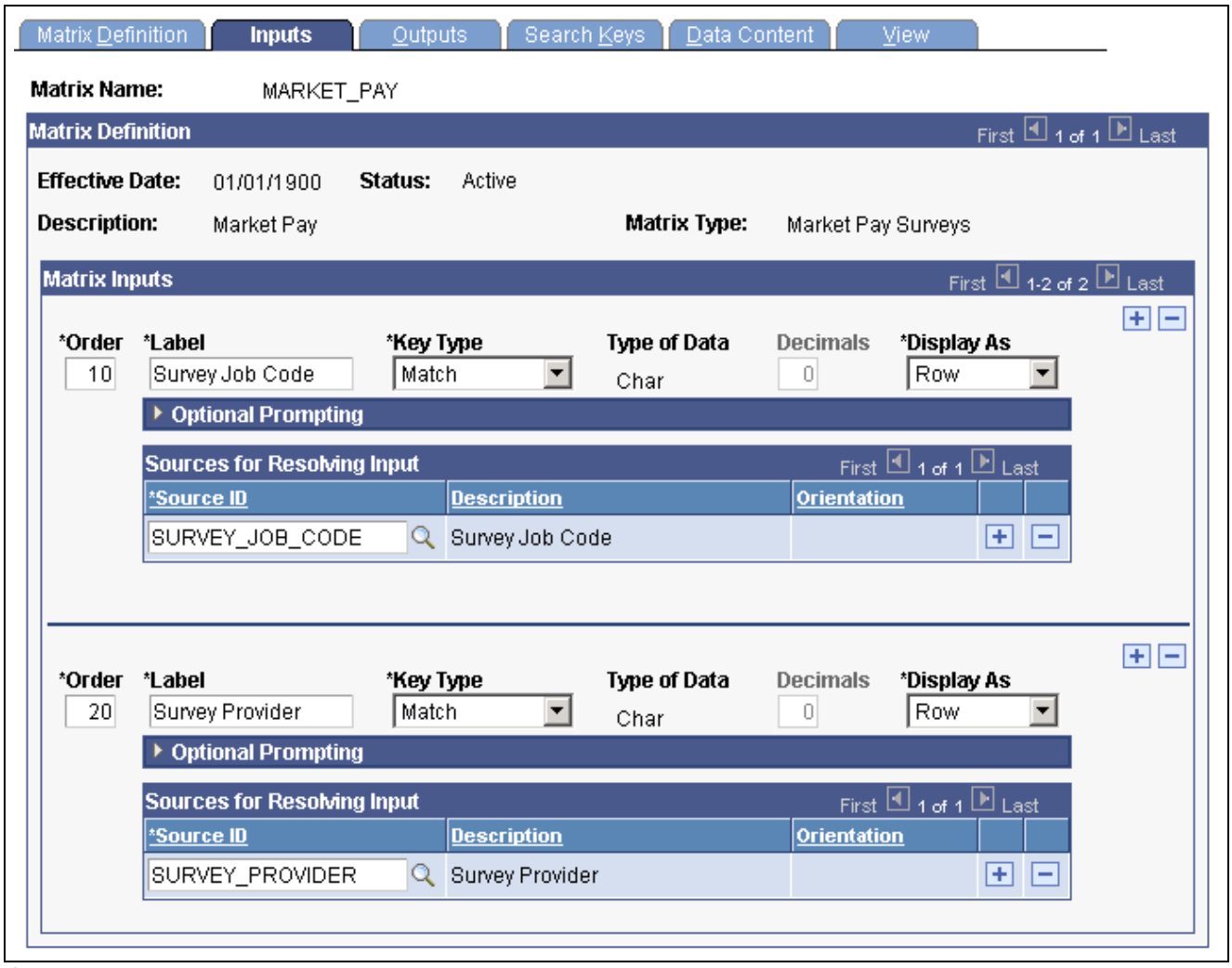
**Status** Select *Active*. The default value for all configurable matrices is *Inactive*. You must change the status to Active in order to use the matrix.

**Effective Date** Enter a date that is equal to or less than the budget period start date to be linked to the matrix.

**Matrix Type** Select *SALMATRIX*.

## Defining Inputs for Salary Increase Matrices

Access the Inputs page.

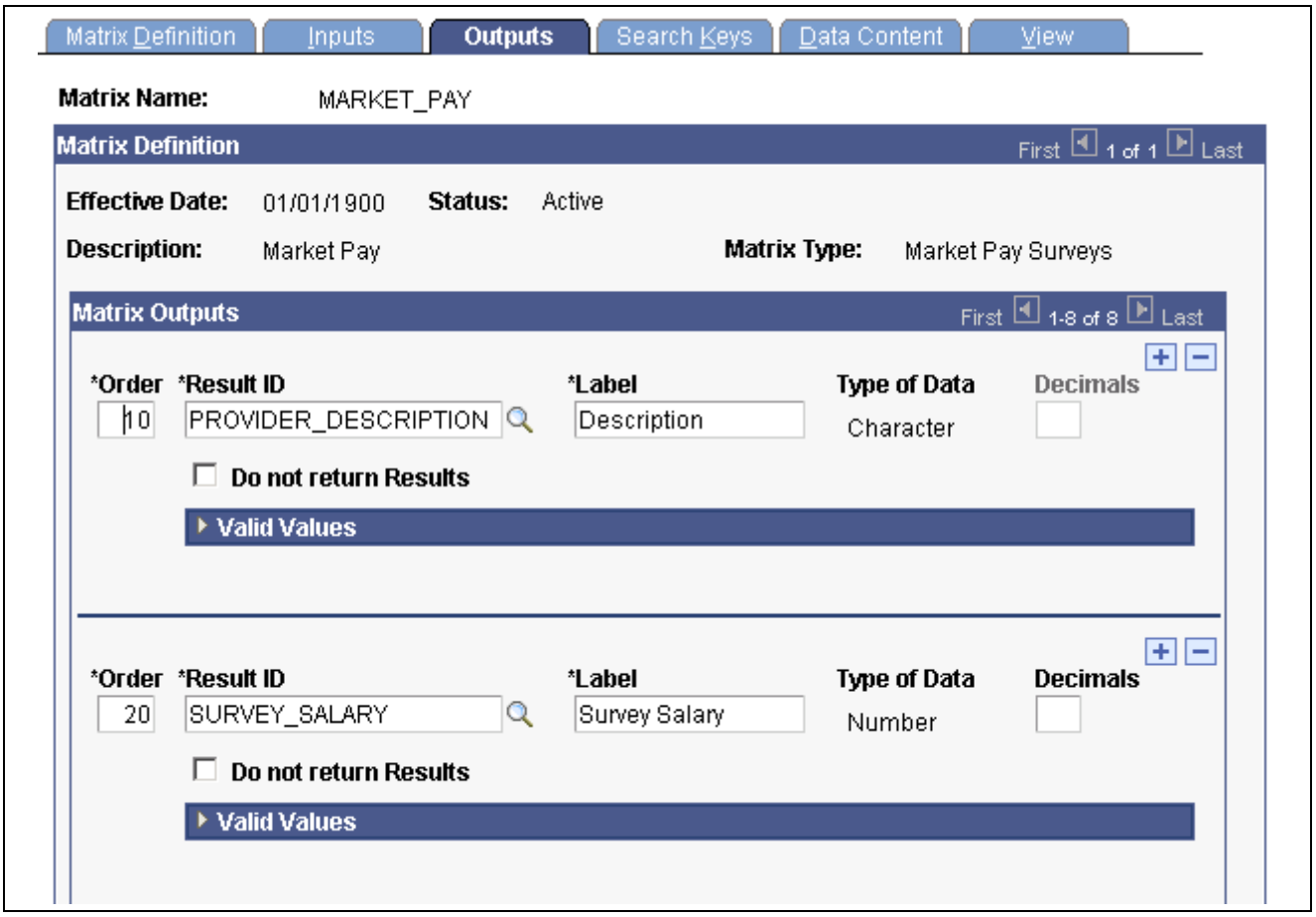


Inputs page

**Source ID** Select the source for the salary increase matrix. The maximum number of inputs for each matrix is 15. Common types of inputs include performance rating, position in range, or compa-ratio.

## Defining Outputs for Salary Increase Matrices

Access the Outputs page.




Outputs page

**Result ID**

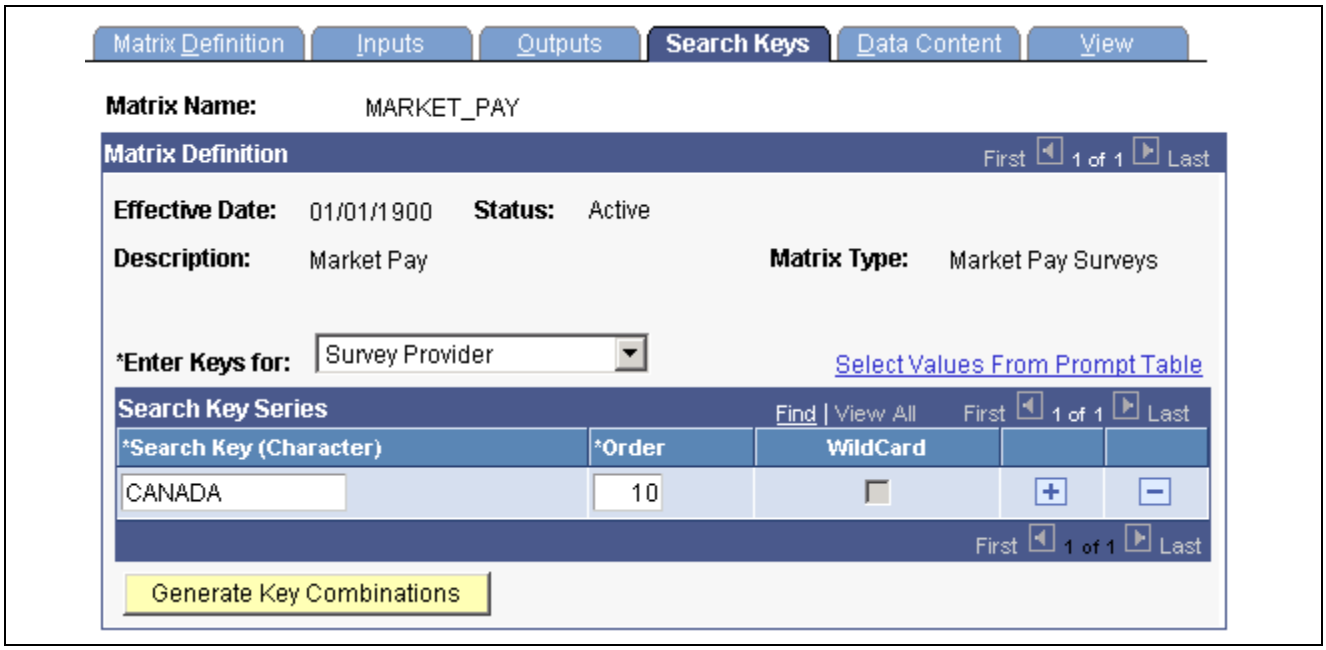
Select an output for the salary increase matrix. Typical outputs include Minimum, Default, and Maximum percentages. You can have a maximum of 30 outputs for each matrix.

These system-delivered values have default names, however, you can edit them to the label that best suits your business.

See Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices," page 213.

## Defining Search Keys

Access the Search Keys page.




Search Keys page

Use this page to enter the key values against which worker data will be matched. Suitable search keys for salary increase guidelines are Percent in Range or Compa-Ratio.

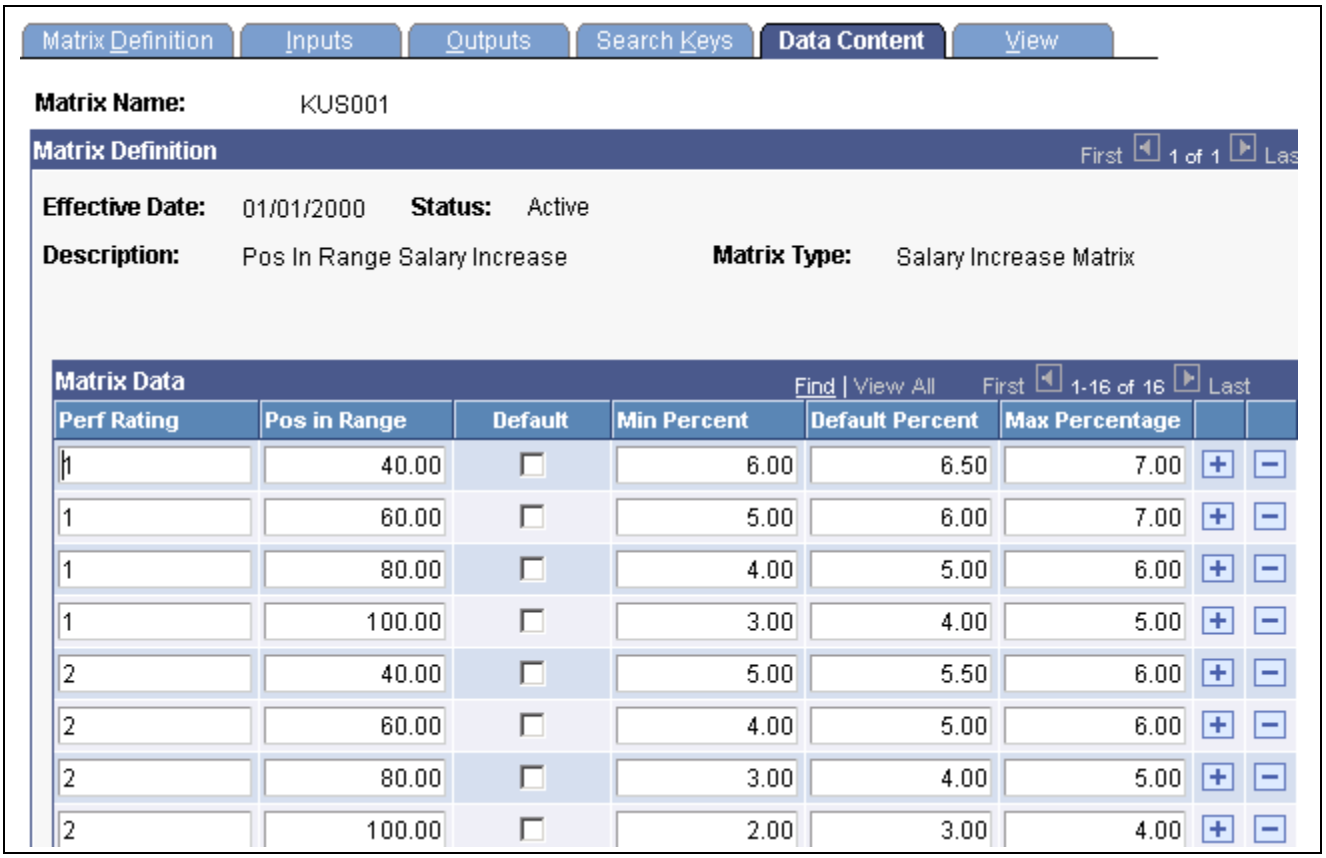
---

**Note.** You can create a configurable matrix without specifying any search keys and output data values. For example, you may want to define a template for a matrix and then load values from other sources such as a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you will receive a warning.

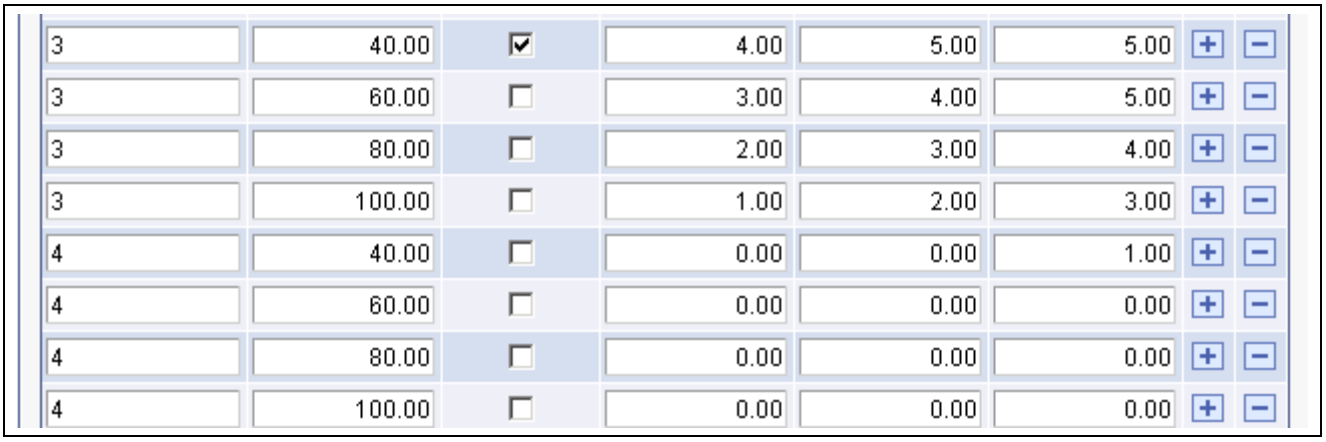
---

# Defining Data Content for Salary Increase Guidelines

Access the Data Content page.




Data Content page (1 of 2)

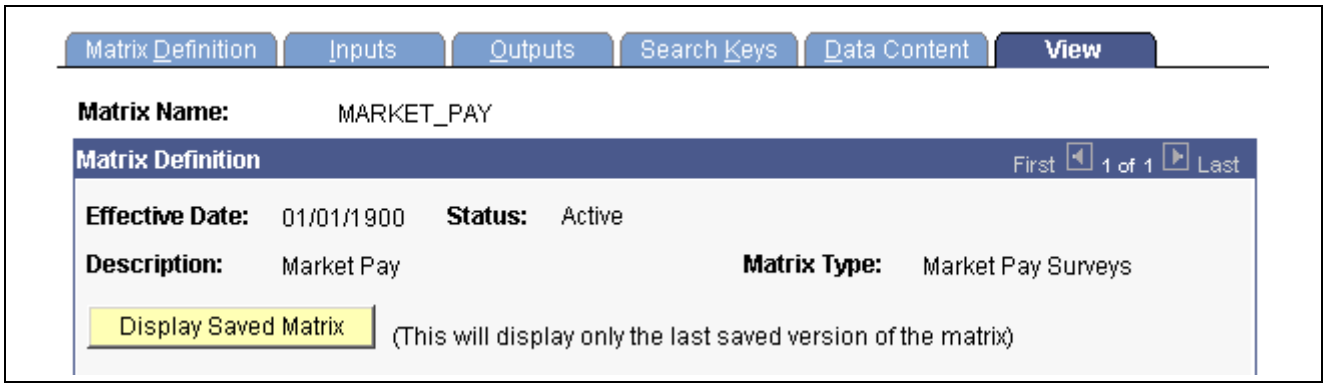



Data Content page (1 of 2)

Use this page to view input and output fields. You will enter the data values according to your salary guidelines.

## Viewing Matrix Results

Access the View page.




View page

After you have entered all data content for outputs, you must save the salary increase matrix. You can view the matrix on this page only *after* you have saved it.

When you click the Display Saved Matrix button, the results generated are from the *last saved* version of the matrix.

**Important!** This page will display only the *last saved* version of the matrix.

# Setting Up Salary Plans, Grades, and Steps

To set up salary plans, grades, and steps, use the Define Salary Increase Matrix (SALARY_MATRIX_TBL), Define Salary Plan (SALARY_PLAN_TABLE), and Define Salary Grades (SALARY_GRADE_TBL) components. Use the SALARY_GRADE_TBL and CI_COMP_RATECD_TBL component interfaces to load the data into the tables for these component interfaces.

This section provides an overview of salary plan setup and describes how to:

- Define a salary increase matrix.
- Define salary plan characteristics.
- Set up salary grades.
- Associate salary grades with labor agreements.
- Associate salary components with salary steps.
- Set grade advance criteria.
- (USF) Establish salary steps within a salary grade.

## Understanding Salary Plan Setup

Before you can use the Base Compensation and Budgeting business process, you need to set up the control tables that support it. 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. (Optional) Create a configurable matrix to calculate the budget.

   See Chapter 5, "Using Configurable Matrices," page 49.

3. Define each salary plan with a unique ID on the Salary Plan Table page.

   German users enter tariff information for the salary plan.

4. Assign a series of salary grades to the salary plan on the Salary Grade Table page.

5. (Optional) Set up labor agreement categorization defaults on the Categorization Defaults page.

6. (Optional) For each salary grade, set up salary steps with pay components and their compensation values and currency on the Salary Step Components page.

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 10, "(JPN) Updating Salaries for Japan," page 163

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

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Salary Increase Matrix Table | SALARY_MATRIX_TBL | Compensation, Base Compensation, Maintain Plans, Define Salary Increase Matrix | Establish the minimum and maximum percentage increases permitted for each review rating by quartile. |
| Salary Plan Table | SALARY_PLAN_TABLE | Compensation, Base Compensation, Maintain Plans, 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 | • Compensation, Base Compensation, Maintain Plans, Define Salary Grades<br>• Compensation, Base Compensation, Maintain Plans, Define Salary Grades USF | 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. |

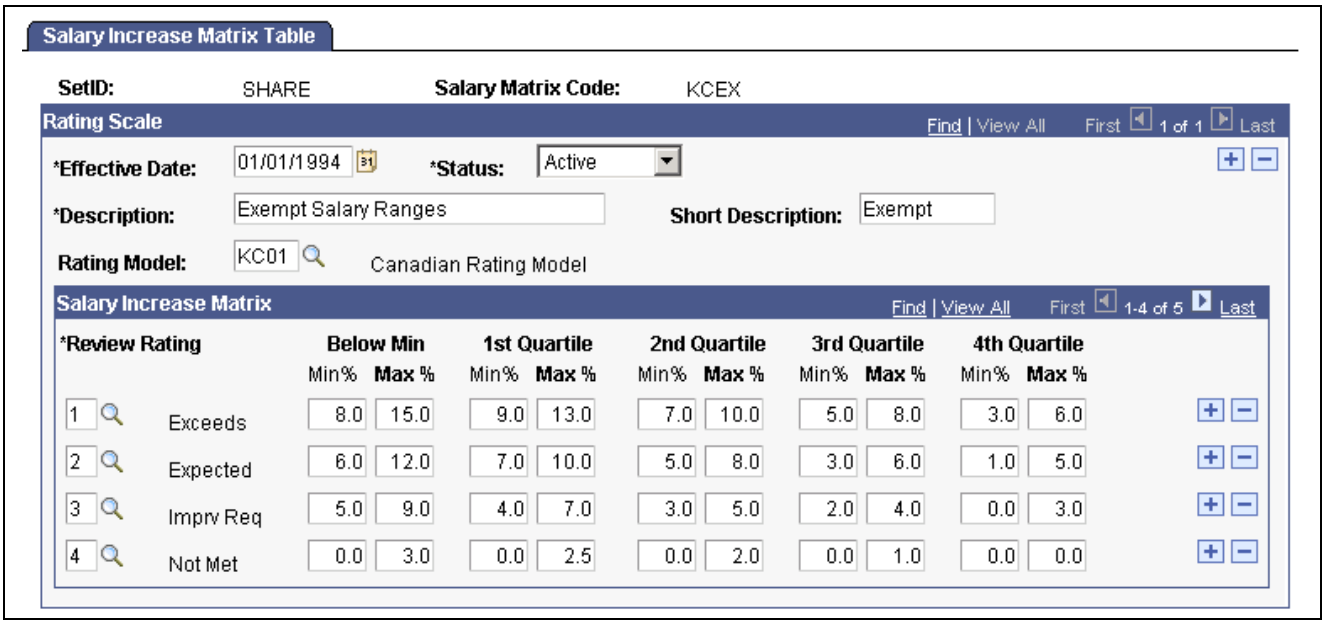
| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Categorization Defaults | SALARY_GRADE2_TBL | Compensation, Base Compensation, Maintain Plans, Define Salary Grades | Associate the salary grade with labor agreement categories and subcategories.<br>Before using this page, define labor agreements, categories, and subcategories on the Employee Categorization page. |
| Salary Step Components | SALARY_GRADE_T3GBL | Compensation, Base Compensation, Maintain Plans, 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 workers move into a specific step. |
| Rate Code | WCS_RTCD_DETAILS | 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, Base Compensation, Maintain Plans, Define Salary Grades | Specify grade advance criteria used in the*Shohkaku* (Grade Advance) candidate process. |
| Salary Structure Summary | SALARY_STRUCTURE | Compensation, Base Compensation, Maintain Plans, 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, Base Compensation, Maintain Plans, 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 workers move into a specific step. |

### See Also

Chapter 10, “(JPN) Updating Salaries for Japan,” Pages Used to Update Salaries by Percentage, page 171

## Defining a Salary Increase Matrix

Access the Salary Increase Matrix Table page.




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 Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments".

### Salary Increase Matrix Table

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

**Below Min** (below minimum) Enter the percentage increase of a worker's existing salary. The below minimum range is for those workers whose salaries are below the amount for the first quartile.

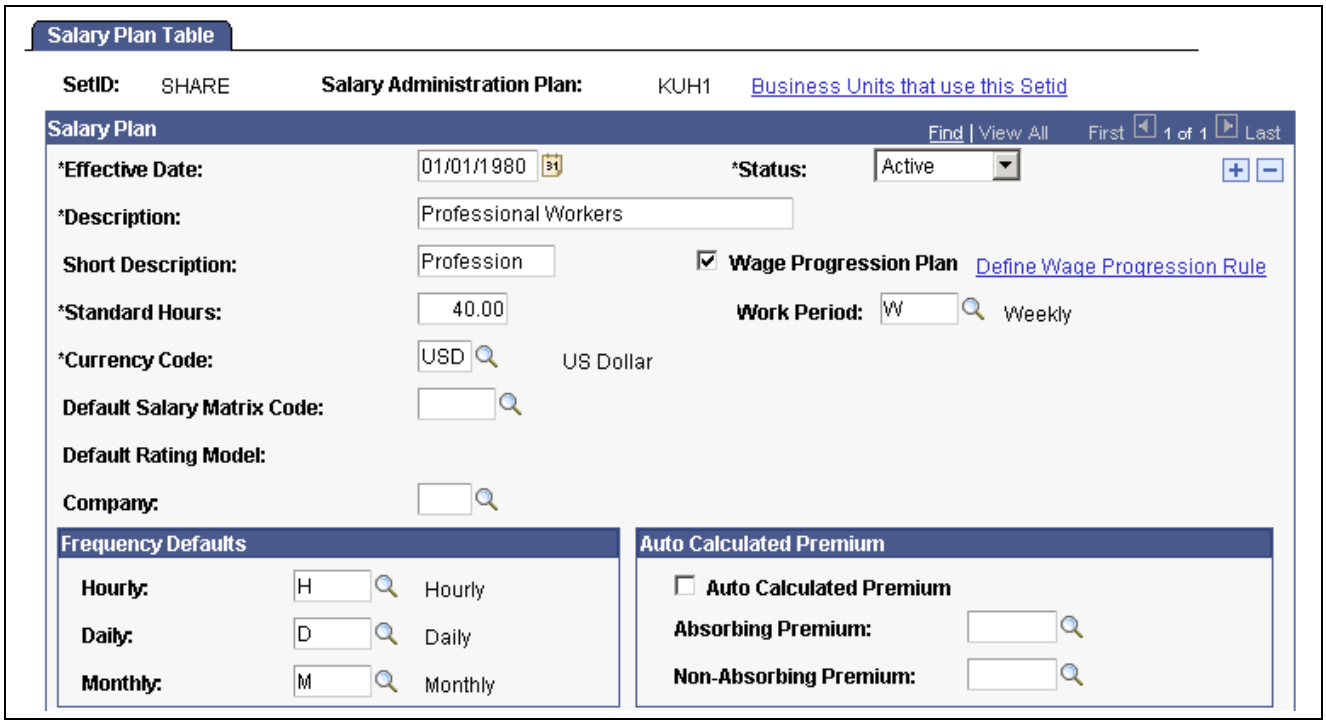
**Note.** This column is optional because some organizations do not permit salaries that are below the minimum.

**First Quartile to Fourth Quartile** For each quartile, enter the percentage increase of a worker's existing salary.

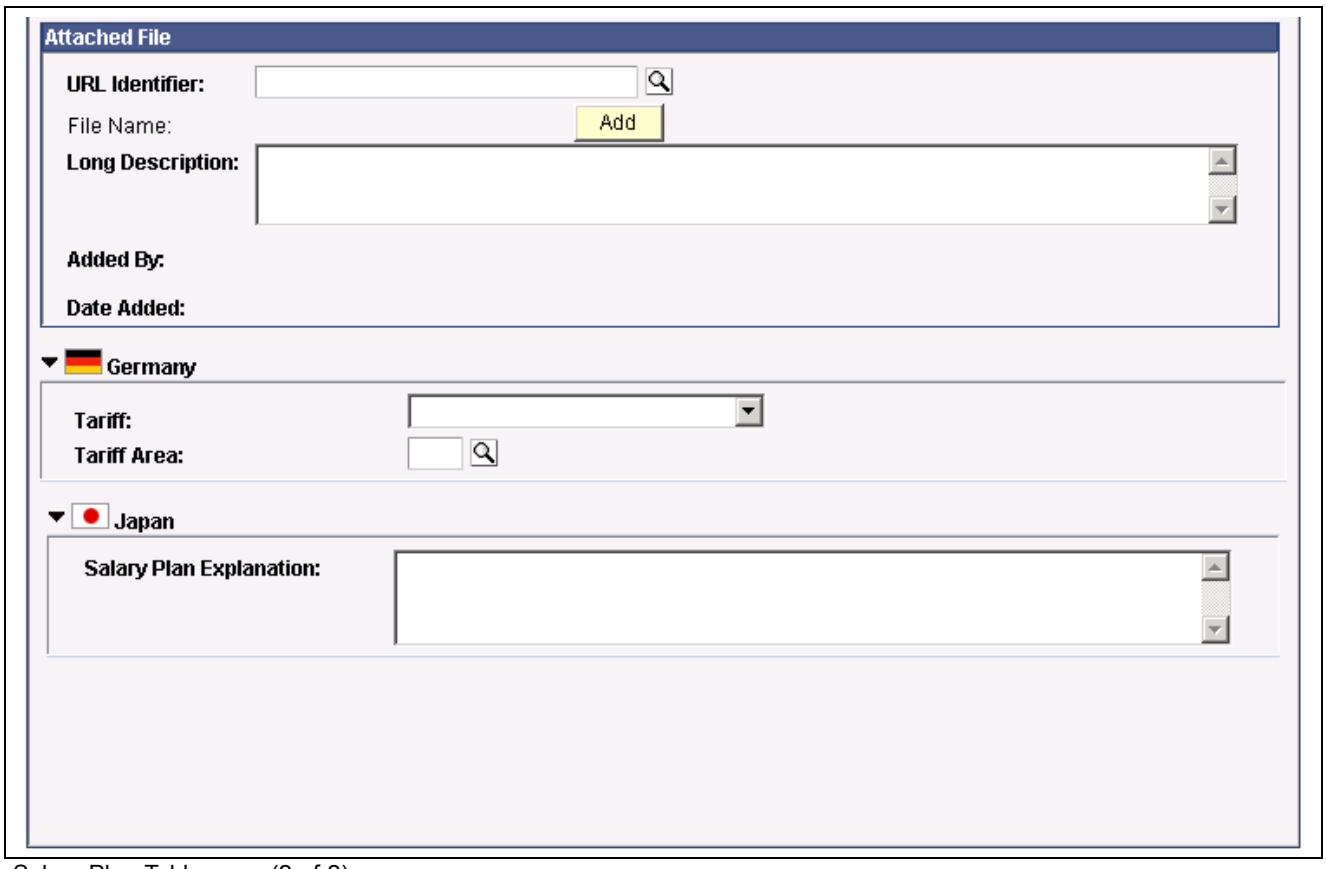
**Note.** If you use a structure other than quartiles as the basis for establishing salary matrices in your organization, you can modify this page to accommodate your requirements. To do this, ask your human resources project leader, or refer to the PeopleTools documentation.

## Defining Salary Plan Characteristics

Access the Salary Plan Table page.




Salary Plan Table page (1 of 2)




Salary Plan Table page (2 of 2)

## Salary Plan

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

**Wage Progression Plan** Select this check box if you want to associate a wage progression plan to this salary administration plan.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation".

**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 Rating Model. 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 workers 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 a worker 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 worker 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.

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

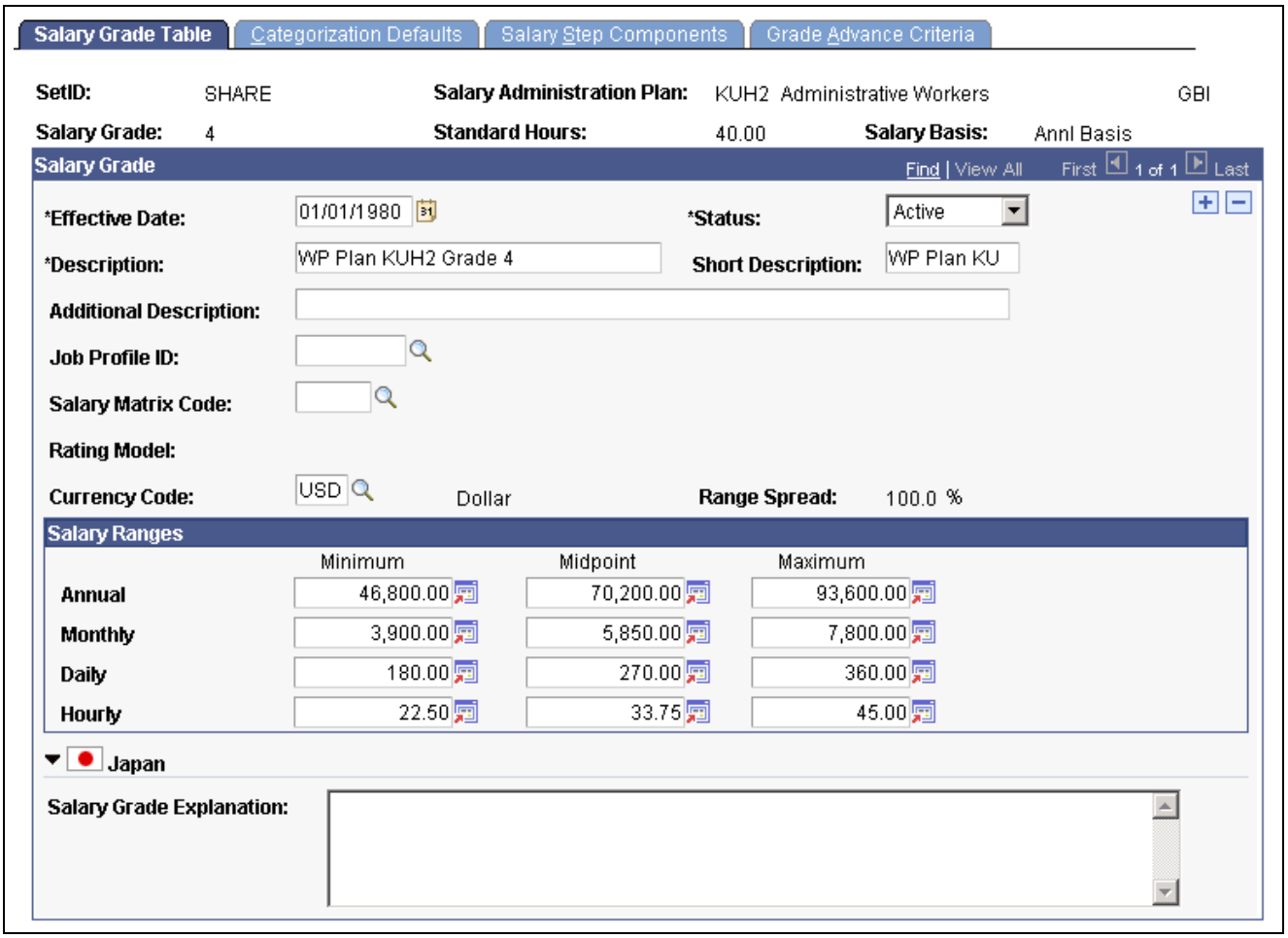
**Next Scheduled Pay Adjustment** Select the date for the next scheduled adjustment.

### (JPN) Japan

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

## Setting Up Salary Grades

Access the Salary Grade Table page.



Salary Grade Table page

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.”

**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.

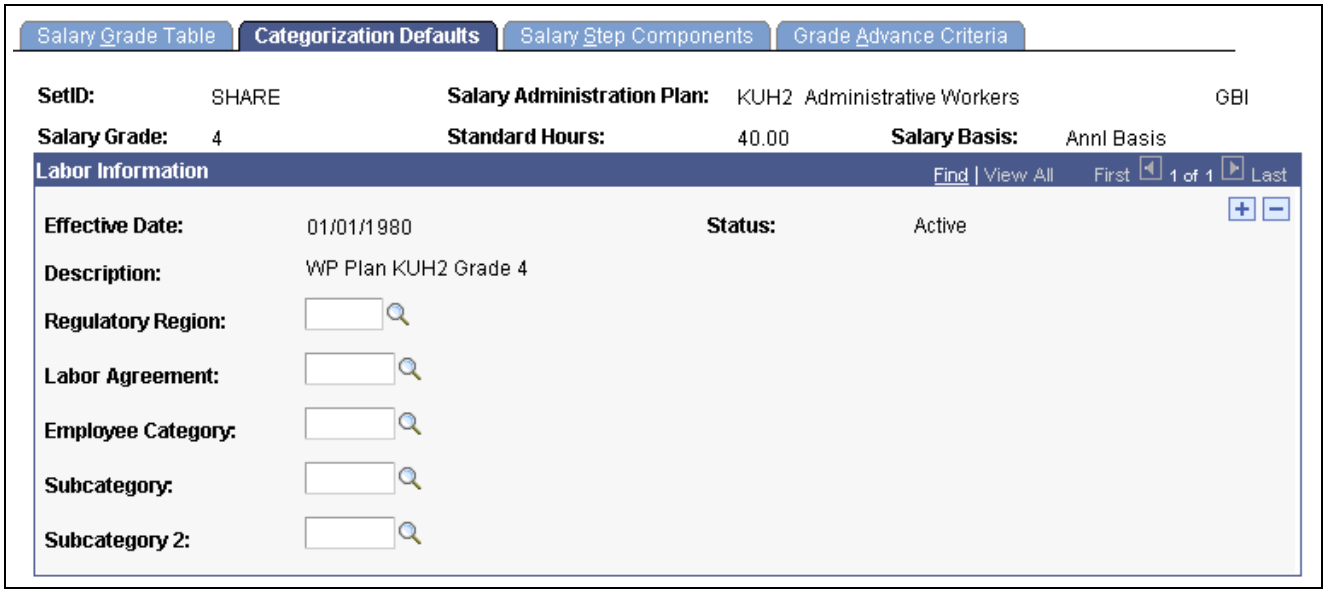
**Annual, Monthly, Daily, Hourly,** and **Biweekly** — Enter the annual, monthly, daily, hourly, or biweekly salary range, depending on how you quote the salary for this grade. If you leave the rows blank the system calculates the values.

### (JPN) Japan

**Salary Grade Explanation** — Use this field to store information such as capability grade requirements and the corresponding supervisor level.

## Associating Salary Grades With Labor Agreements

Access the Categorization Defaults page.




Categorization Defaults page

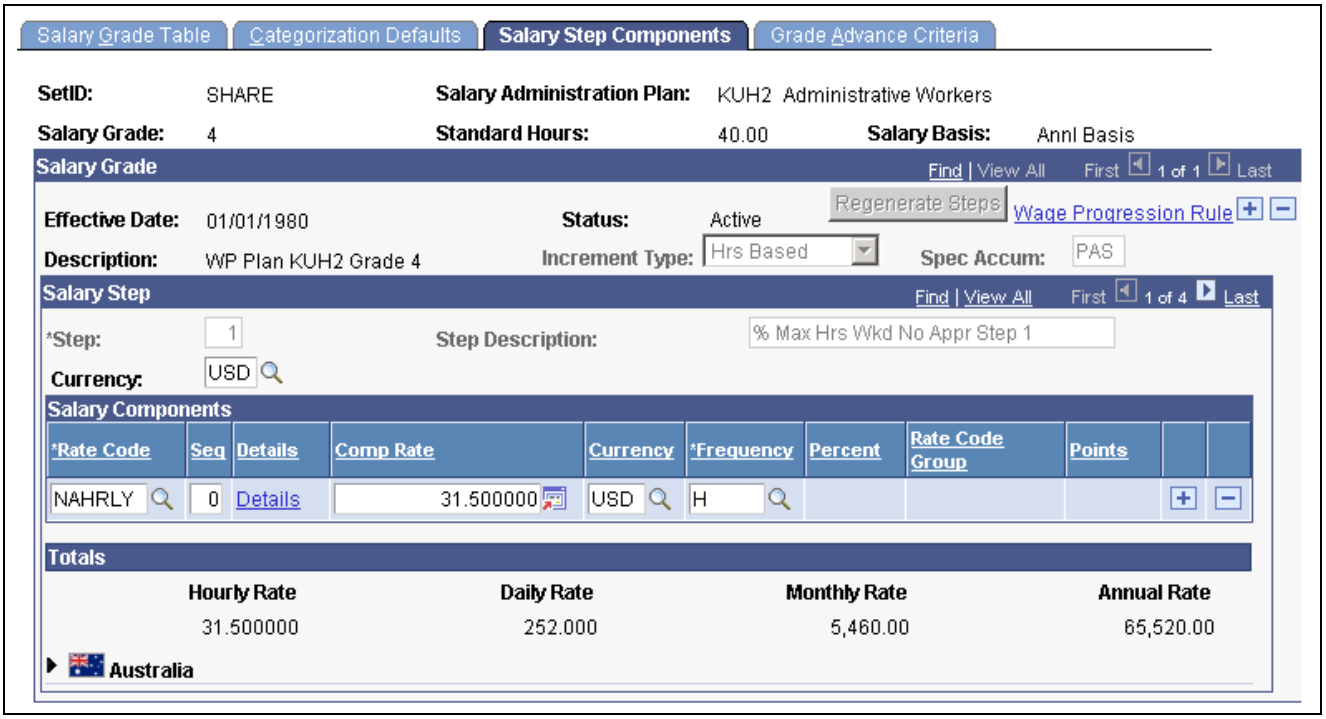
If the salary administration plan has a related wage progression rule, this page will not be available.

**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.

# Associating Salary Components With Salary Steps

Access the Salary Step Components page.




Salary Step Components page

## Salary Grade

**Increment Type**

If you plan to run a process that automatically moves a worker to the next salary step, select from these valid values:

- *(None):* Select to use no increments or to clear values that are entered in error.
- *Date Based:* Select to move the worker into the next step based on the worker'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 worker'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.
- *Wks Based* (weeks based): This value is for U.S. federal government users only.

**Spec Accum** (special accumulator)

If you selected an Increment Type of *Either* or *Hrs Based,* select a special accumulator. The system uses this accumulator to determine worker compensation.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits*, "Setting Up Base Benefits Core Tables," Setting Up Special Accumulators.

**Generate Steps** or **Regenerate Steps** — Click this button to calculate or recalculate the salary steps after you have changed the wage progression rules.

**Wage Progression Rule** — Click this link to access the Wage Progression Rules page where you can view wage progression rules associated with this salary grade.

## 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 Increment Type of *Date Based* or *Either,* enter the number of months that the worker must remain in this step before being eligible for the next step increment.

**Hours to Next Step Increment** — If you select an Increment Type of *Either* or *Hrs Based,* enter the number of hours that the worker must accumulate 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 and rate matrix, if applicable.

**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.

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**Note.** This field is unavailable if you are using a rate code that has an associated rate matrix.

---

**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.

**Note.** For purposes of comparing the hourly rate to the maximum of the step rate, the system does not use rounding but uses six decimal places to verify if the hourly rate is less than the maximum rate. Once this check is performed, the final number for the hourly rate is displayed rounded to *two* decimal places.

### (AUS) Australia

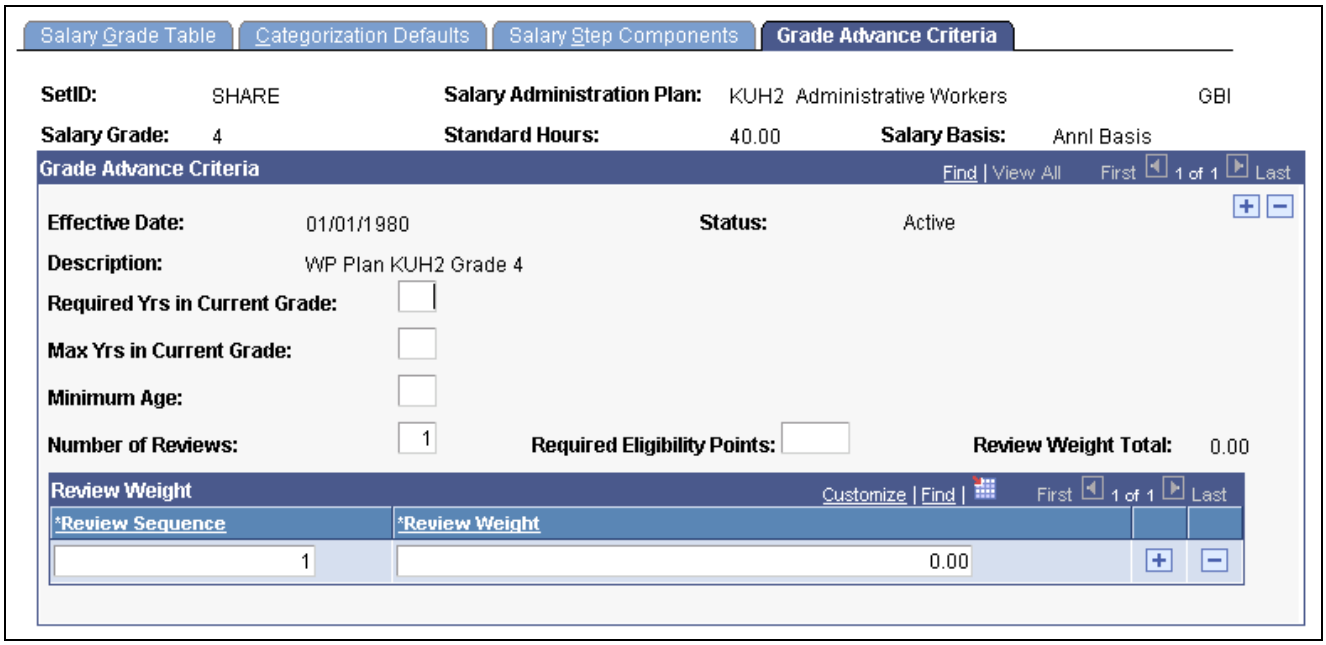
This group box appears only if the Education & Government check box on the Installation Table − Country Specific page has been selected.

**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.

## Setting Grade Advance Criteria

Access the Grade Advance Criteria page.




Grade Advance Criteria page

If the salary administration plan has a related wage progression rule, this page will not be available.

## Grade Advance Criteria

**Required Yrs in Current Grade** (required years in current grade)
Enter the number of years workers 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 workers can be in this grade. When checking for workers 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 workers must be to be eligible to advance from this grade.

**Note.** This refers to workers' 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 a worker'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 a worker 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.

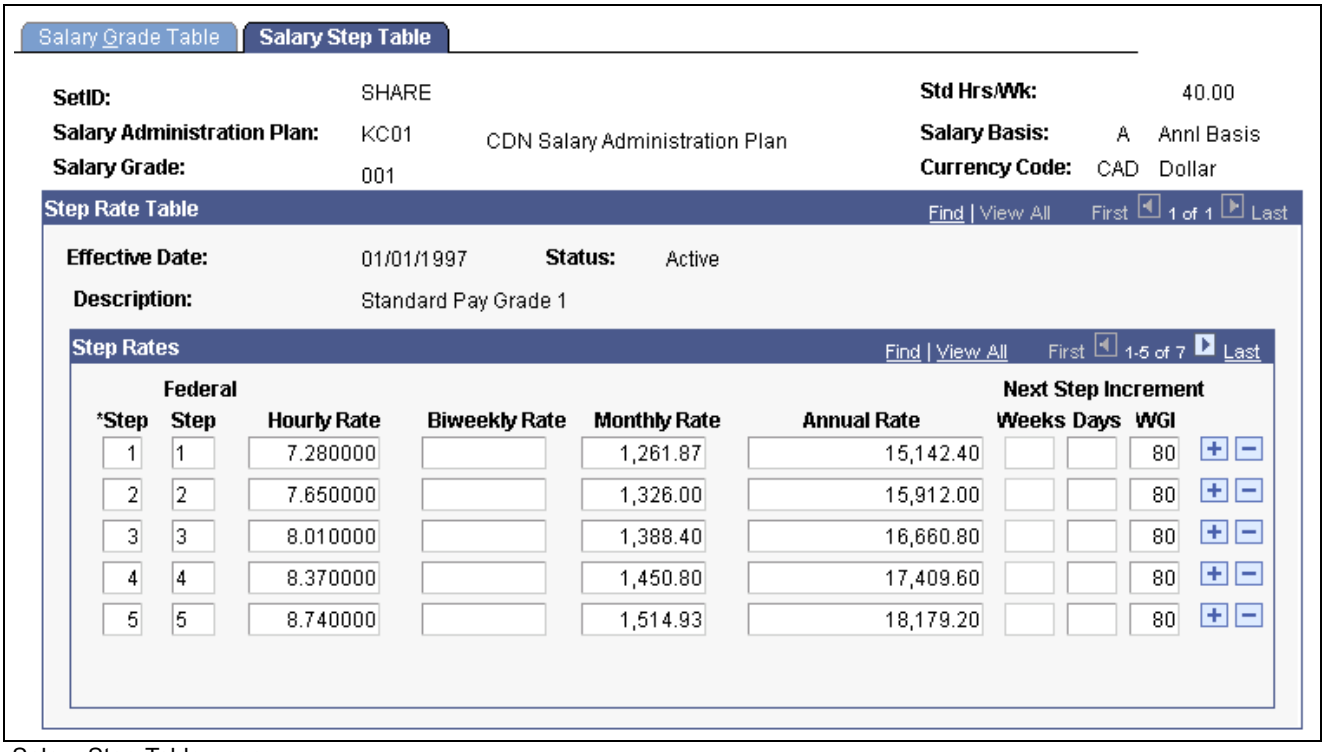
**Note.** If you have more reviews defined as applicable for grade advance than you specify here, it doesn't matter. If you are only going back two reviews, the system ignores any earlier reviews even if they are defined as applicable for grade advance. You do not have to go back to the Review Definition 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.




Salary Step Table page

**Salary Basis** Displays the salary basis.

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

| | |
|---|---|
| **BiWeekly Rate** | Displays the total biweekly rate value of all the rate codes of the salary step in the currency of the salary step. |
| **Next Step Increment − Weeks** | The number of weeks before the worker is moved into the next step based on the worker's entry date into the step. |
| **Next Step Increment − Days** | The number of days before the worker is moved into the next step based on the worker's entry date into the step. |
| **Next Step Increment − WGI** | 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 worker's unprocessed nonpay hours to determine if the worker's WGI due date has been impacted.<br><br>See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "(USF) Administering Additional U.S. Federal Payroll Functionality," Processing WGI, Tenure, and Probation Nonpay Hours. |

# Running Salary Grades and Salary Steps Reports

To generate reports for salary grades and salary step reports, use the Salary Grade (RUN_PER706A-), Salary Grade/Step (RUN_PER706B-), and Salary Structure (RUN_CMP001) components.

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_ASOFDATE | Compensation, Base Compensation, 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, Base Compensation, 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, Base Compensation, 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.

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

# Setting Up Base Compensation Budgeting and Planning

To set up base compensation budgeting and planning, use the Budget Types (SP_BUD_TYPE_TBL), Define Budgets (CONTROL_TBL), Default Budget Parameters (SAL_PLAN_CONTROL), and Assign Group Budget Parameters (SAL_PLAN_CNTRL_GRP) components.

This section provides an overview of base compensation budgeting and planning and describes how to:

- Define salary plan default values.
- Establish group default control values for base compensation budgets and plans.

## Understanding 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 worker 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 budget default IDs on the Budget Defaults page.
2. Define plan default control values on the Budget Default Values page.
3. Define budget default control values at the group level on the Group Default Values page.

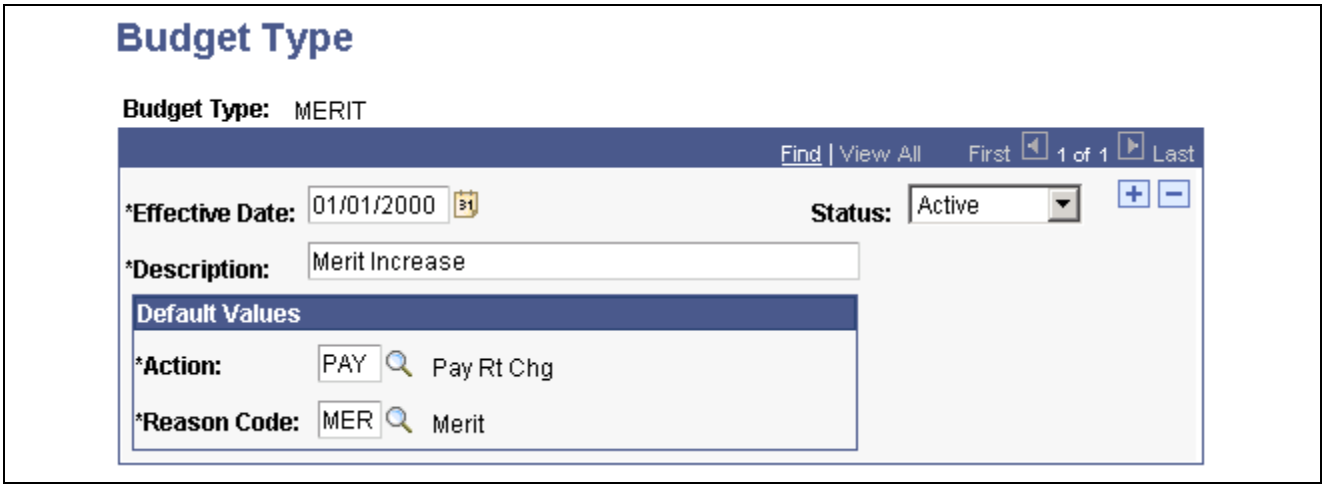
   The values that you save on this page are the default control values that the system enters on the Group Budgets component and Budget Description page when you establish salary adjustment budgets and plans for this group.

# Pages Used to Set Up Salary Increase Budgeting and Planning

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Budget Type | SP_BUD_TYPE_TBL | Set Up HRMS, Product Related, Compensation, Base Compensation, Budgets Types | Define budget types and assign default values for action and reason codes. |
| Budget Defaults | CONTROL_TBL | Set Up HRMS, Product Related, Compensation, Base Compensation, Define Budgets | Set up a budget plan that may span multiple budget periods. |
| Budget Default Values | SAL_PLAN_CONTROL | Set Up HRMS, Product Related, Compensation, Base Compensation, Default Budget Parameters | 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 | Set Up HRMS, Product Related, Compensation, Base Compensation, Assign Group Budget Parameters | 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 Budget Default Values page. You can change the default values for the group. |

## Defining Budget Types

Access the Budget Type page.




Budget Type page.

**Effective Date** Enter an effective date for the budget type.

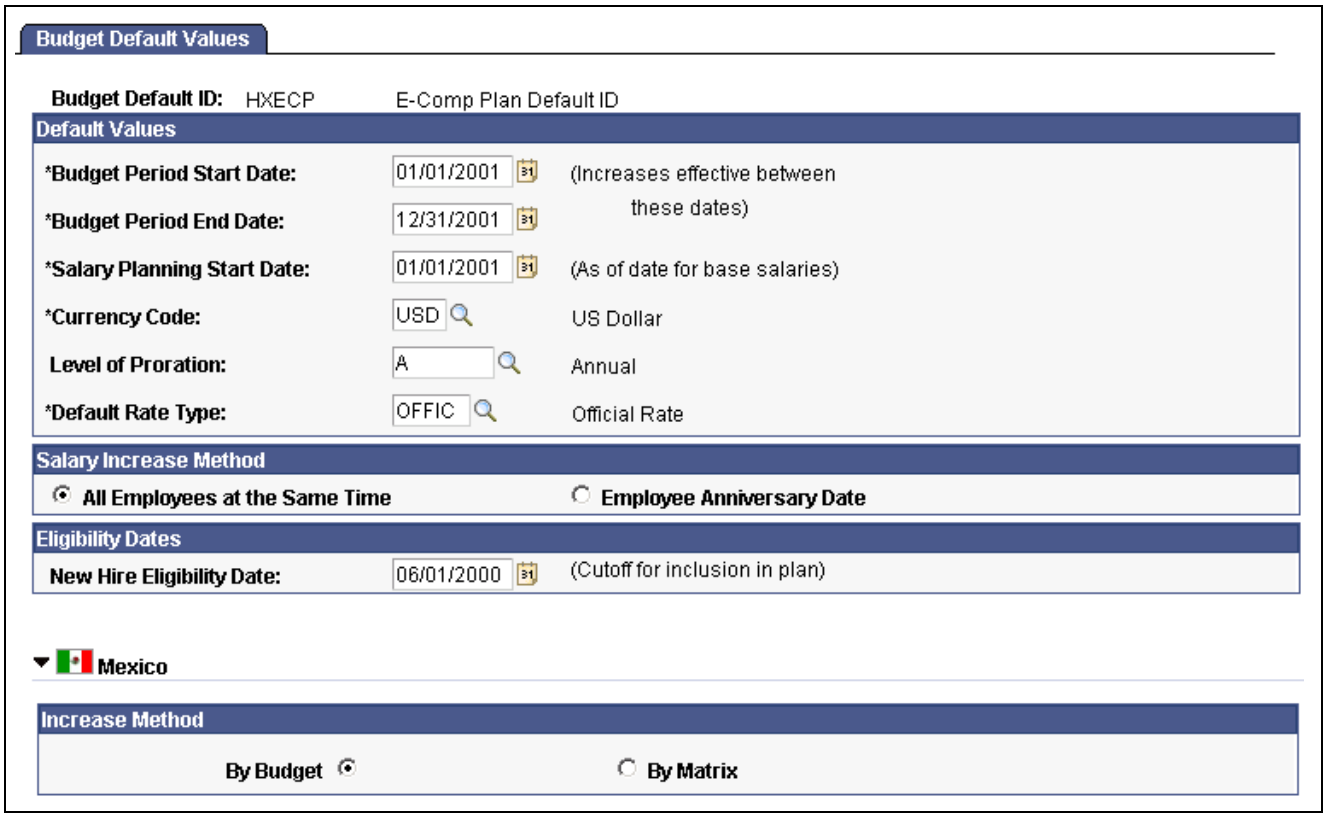
**Status** Select *Active* or *Inactive*. Only budget types with a status of Active can be used.

**Action** Select a value. Values come from the Action Table.

**Reason Code** Select a value. Values come from the Action Reason Table.

# Defining Budget Default Values

Access the Budget Default Values page.




Budget Default Values page

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

## Default Values

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

**Salary Planning Start Date** Enter the salary planning start date. The system basis its calculations for new increases on the salary planning start date.

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

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

**Default Rate Type** Select the rate type that you want the system to enter as the default for your salary increase plans. Valid values are the exchange rate types that you

previously established on the Currency Rate Type Table. The system uses this rate type for all currency conversions.

## Salary Increase Method

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

**All Employees at the Same Time** Select if you want all salary increases under your salary plans to be implemented for all workers 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 workers' 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 worker's anniversary date. The anniversary date can be the worker'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 worker's anniversary date will be the effective date of the increase in the worker's job data row.

  You cannot define multiple increases by effective date and effective sequence if administration is by worker 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 workers 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 workers to be included in the plan. Any workers 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

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

- By Budget (standard budget raise method).

  With the standard method, you can take the budgeted percentage and insert it into the worker's salary plan.
- By Matrix (salary increase matrix method).

With the salary increase matrix method, you can take the percentage from the salary increase matrix.

Once you select the By Matrix method on the Budget Default Values page and the Group Default Values page, you need to calculate the salary increase for the worker.

# Establishing Group Default Control Values for Base Compensation 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

**Budget 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 Budget Default IDs on the Budget Default Values page.

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

# CHAPTER 4

# Administering Salary Plans, Grades, and Steps

This chapter provides overviews of salary plans, salary increase guidelines, and salary grades and steps, and discusses how to:

- Administer compensation with salary plan defaults.
- Administer salary increases.
- Report worker salary structure information.
- View worker salary structure information.

## Understanding Salary Plans

This section discusses currency defaults and conversion in salary plans.

Set up each salary plan with a unique ID. The series of grades within all salary plans have the same IDs, such as grades 001 to 010. Similarly, the steps that are within grades have the same IDs, such as steps 1 to 10. Therefore, the 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 workers. These defaults ease the administrative burden both at hire and when a worker has a job change. For example, assume that you hire a worker into a particular grade and step at one location, then transfer the worker to another location. When you enter the location change, the system automatically assigns the salary plan of the new location to the worker, if you are storing salary plans on the Location Table. The new salary plan brings with it the same grade and step structure, but with the compensation that is appropriate to the new location.

### Currency Defaults 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 the organization's needs.

The system performs compensation frequency conversion in the currency that is 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.<br>Salary Plan Table setup page. | The currency code that you select for the organization on the Installation table. | None (for defaults only). |
| Salary Grade.<br>Salary Grade Table setup page. | The currency code that you select 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.<br>Salary Step Components setup page. | The currency code that you select 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.<br>In the grid on the Salary Step Components setup page. | The currency that you define 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. |

# Understanding Salary Increase Guidelines

The system ties the data in the Salary Increase Matrix table to salary increase plans and worker Pay Rate Change pages. It determines where a worker falls in the range by taking salary minus the minimum divided by the spread. For example, a worker with a salary of 26,000 USD in a salary grade range of 25,000 to 30,000 falls 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 the compensation plans, you can set up salary grades only or salary grades and salary step components. Salary grades define an appropriate salary range for a worker that is assigned to that grade. Step Components define the actual recommended pay rate by component for a worker who is assigned to that step.

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

# (JPN) Setting Grade Advance Criteria

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

## Weighted and Non-Weighted Sample Results

The decision to use weighted or nonweighted reviews has an effect on the results. In the examples that follow:

A is the worker's results.

B1 and B2 are settings for weighted and nonweighted (simple average) methods respectively.

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

## A: Worker'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: Nonweighted (Simple Average) Method

| No. of Reviews | Review Weight |
|---|---|
| 2 | N/A |

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

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

### C2: Result of Using Nonweighted (Simple Average) Method: = (80 + 100) / 2 = 90

| Review | Final Review Band Code | Eligibility Points | Result of Nonweighted 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

Use the LOCATION_TABLE and CI_JOB_CODE_TBL component interfaces to load the data into the tables for these component interfaces.

This section discusses tying salary plans to job codes, locations, or labor agreements.

You specify a worker's salary administration plan, labor agreement, grade, and step on the Job Data - Salary Plan page. When you hire or transfer a worker, the system enters default values in these fields. You can assign default salary plans, grades, and steps to a worker 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.
- Associate a salary plan with a labor agreement on the Salary Plan Table page.
- Assign a salary plan directly to a worker 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 worker's compensation record, where you can change it. The system verifies that any combinations of salary administration plans and grades that you select are valid and exist in the system. If the combination does not exist, the system issues a warning message.

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

## Tying Salary Plans to Job Codes, Locations, or Labor Agreements

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, location, or labor agreement.

To set up a salary structure reflecting location differences, tie salary plans to locations in the Location table. The salary plan that is associated with the location overrides the salary plan that is tied to the job code. When you select a location for a worker 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 a worker in the Job Data pages, the system enters the salary plan from the Job Code table.

To set up a salary structure reflecting compensation differences reflecting wage agreements, associate the salary plan to the labor agreement on the Job Data - Salary Plan page.

### See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps, page 14

# Administering Salary Increases

To administer salary increases, use the Automated Step Increment (RUNCTL_CMP007) and Automated Step Increment EG (RUN_CMP107) components.

This section provides an overview of salary increase administration, lists common elements, and discusses how to:

- Enter salary changes in the Job Data pages manually.
- Enter salary increases by using the Automated Step Increase process.
- Move workers to the next step.
- (E&G) Move workers to the next step.

## Understanding Salary Increase Administration

You administer salary changes in one of the following ways:

- Manually enter salary changes in Job Data Pages or Pay Rate Change pages.
- (CAN, USA) Implement automated step increases by using the Automated Step Increase process.

- Tie salary increases to the worker's performance review.
- Create salary increase budgets and plans and load the mass increases to the job records.
- Process mass salary changes across the organization based on percent, pay group, or job code.

### See Also

Chapter 2, "Understanding Base Compensation and Budgeting," page 3

Chapter 9, "Processing Mass Salary Increases," page 153

## Entering Salary Changes in the Job Data Pages Manually

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

If you input salary ranges on the Salary Grade when you enter a compensation rate on the Compensation page in the Job Data or Pay Rate Change components, the system compares the new compensation rate against the values in the salary ranges. 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 the organization, then the system changes the warning to an error message so that no out-of-range salaries can be entered.

### See Also

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Updating Person and Job Information"

## Common Elements Used in This Section

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

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

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

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

**Review Rating** Enter the minimum criteria for workers if the rating scale that you select is an average scale type.

## Pages Used to Run the Automated Step Increase Process

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Automated Step Increase | RUNCTL_CMP007 | Compensation, Base Compensation, Maintain Plans, Automated Step Increment | Automatically move workers to the next salary step when they complete the required time in the current step. |
| (E&G) Load Auto Step Increments | RUNCTL_CMP107 | Compensation, Base Compensation, Maintain Plans, Automated Step Increment EG | Automatically move workers to the next salary step when they complete the required time in the current step. |

## Entering Salary Increases by Using the Automated Step Increase Process

If you enter *Date Based, Hours Based,* or *Either* in the Increment Type field on the Salary Step Components setup page, you can use the Automated Step Increase process (CMP107) to automatically move qualified workers into the next step. The system automatically inserts a new job data row for workers 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 a worker 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.

---

**Note.** When you run the Automated Step Increase process with an increment type of *Hours Based* or *Either,* you must have installed PeopleSoft Payroll for North America. The Automated Step Increase process retrieves the number of hours that you work from one of the following PeopleSoft Payroll for North America tables: US Earnings Balance and Canadian Earnings Balance.

You do not need to have PeopleSoft Payroll for North America installed to run the Automated Step Increase process with an increment type of *Date Based.*

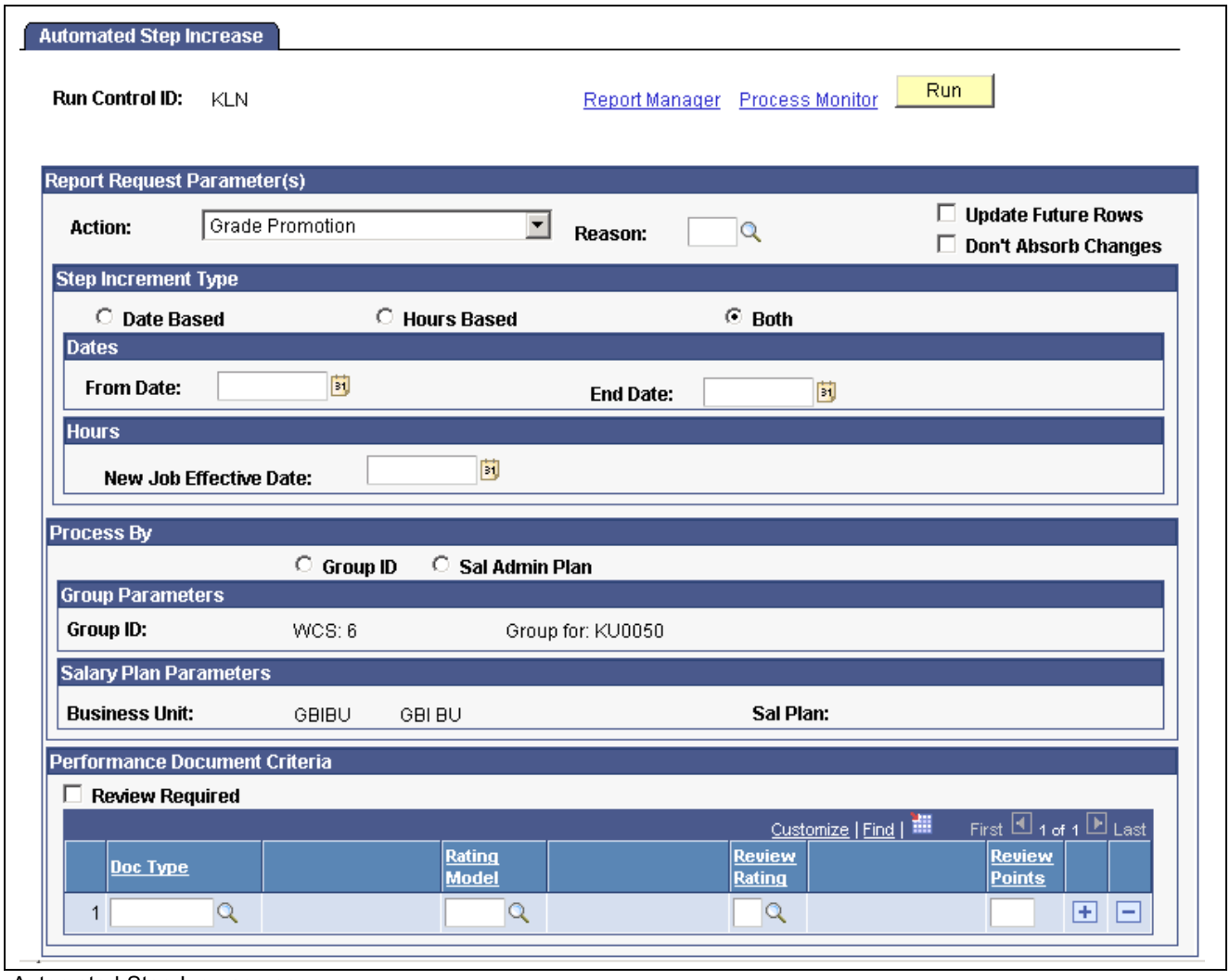
---

To run the Automated Step Increase process:

1. (Optional) Run the Late Reviews process to notify supervisors about worker reviews that are late. This process selects all workers whose last review effective date is on or before the date that the process runs and whose next review date is before the date that 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 workers have not yet received a review.
2. Run the process (CMP007) by using PeopleSoft Application Engine to find the workers 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 that is created by running PeopleSoft Application Engine.
4. Run the process (HR_SP_CI) by using Application Engine to load all the data to the Job Data pages for your workers.

## Moving Workers to the Next Step

Access the Automated Step Increase page.



Automated Step Increase page

**From Date** and **End Date** Enter the date range that 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 that is later than the End Date) in addition to the effective dated rows it is adding.

**Action** and **Reason** Enter the action and reason for the workers who are receiving a step increase.

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

This option only applies to workers who have a target compensation rate and are assigned to a salary plan with the auto calculated premium function enabled.

See Chapter 3, "Setting Up Base Compensation and Budgeting," Defining Salary Plan Characteristics, page 17.

**New Job Effective Date** If you use 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 becomes available for you to select the group ID of the worker group that you want to process.

**Sal Admin Plan** (salary administration plan) — Select to process by salary administration plan. The Business Unit and Sal Plan fields become available for you to select the salary plan that you want to process.

### Performance Document Criteria

**Review Required** — Select this check box if a performance review is required.

**Doc Type** (document type) — Select a value for the performance review.

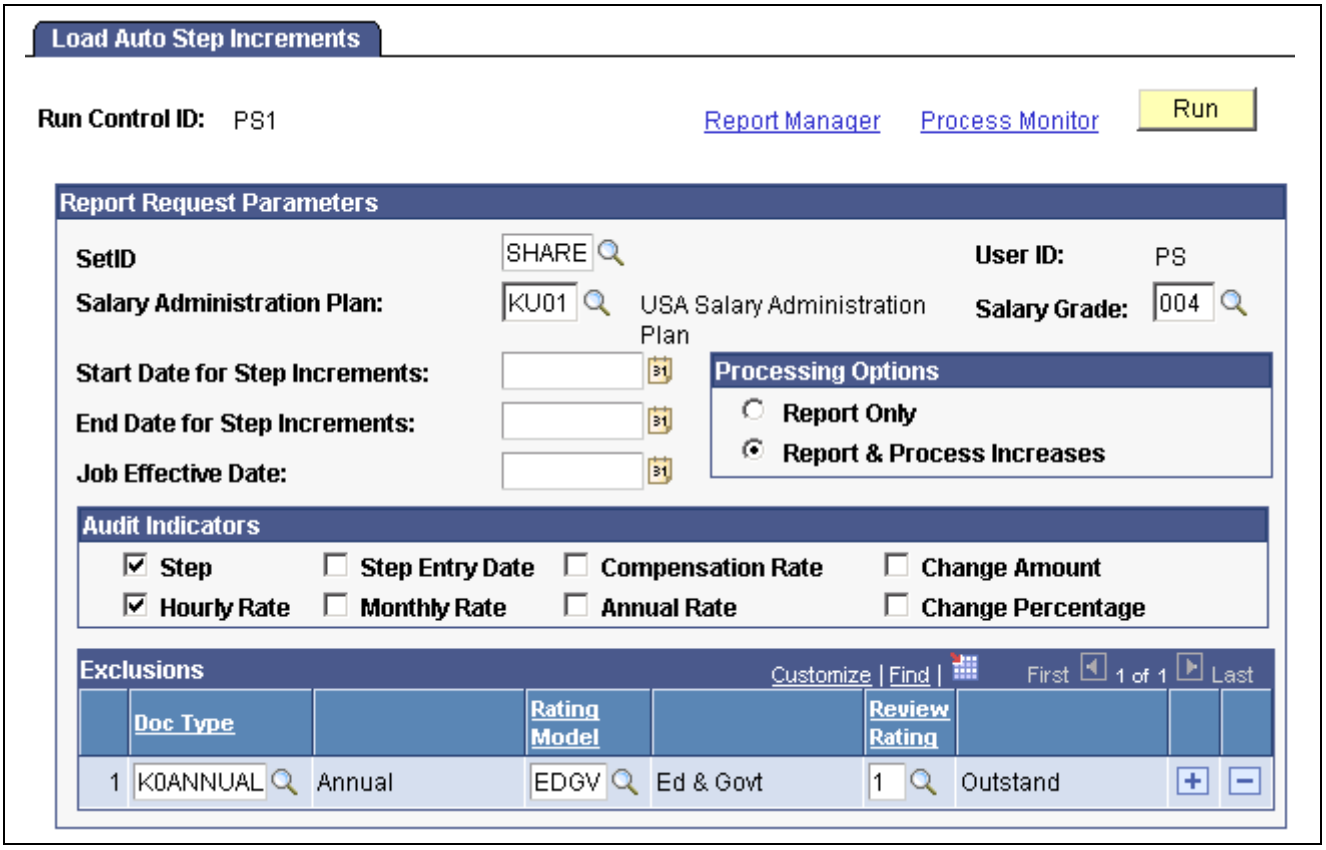
**Rating Model** — Select a value. These values come from the Rating Model Table.

**Review Rating** — Select a value. These values come from the Rating Model Table.

**Review Points** — Enter the number of points associated with the performance review.

## (E&G) Moving Workers to the Next Step

Access the Load Auto Step Increments page.




Load Auto Step Increments page

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

### Processing Options

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

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

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

# Viewing Worker Salary Structure Information

This section discusses how to:

- View compa-ratios.
- View range calculations.

## Viewing Compa-Ratios

Use the compa-ratio calculation to see where workers' salaries lie in relation to the midpoint range for their salary grades. The ratio appears in the Job Data - Compensation page for each worker.

The system calculates the ratio by comparing the worker salary to the midpoint amount of the salary grade. If the worker'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 workers' 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 worker.

The range percent indicates where the worker's salary falls within the worker's salary grade range. The system calculates the range percent as follows:

- If the worker falls below the minimum range, then $Range\ \% = \left(\frac{\text{EE Salary - Min of Range}}{\text{EE Salary}}\right) \times 100.$
- If the worker falls above the maximum range, then $\text{Range } \% = \left(\frac{(\text{EE Salary - Max of Range}) \times 100}{\text{Max}}\right) \times 100.$
- If the worker falls in the range, then $\text{Range } \% = \left(\frac{\text{EE Salary - Min of Range}}{\text{Max - Min}}\right) \times 100.$

# Reporting Worker Salary Structure Information

To run worker salary structure information, use the Job Grading by Evaluation Pts (RUN_CMP002), Ratio Analysis (RUN_CMP003), Below Minimum Analysis (RUN_CMP004), Above Minimum Analysis (RUN_CMP005), Salary History by Department (RUN_PER012), and Grade Advance Candidates JPN (PER062_JPN) components.

This section discusses how to run the Grade Advance candidate report.

After assigning salary plans, grades, and steps to locations, job codes, or workers, 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 Worker Salary Structure Reports

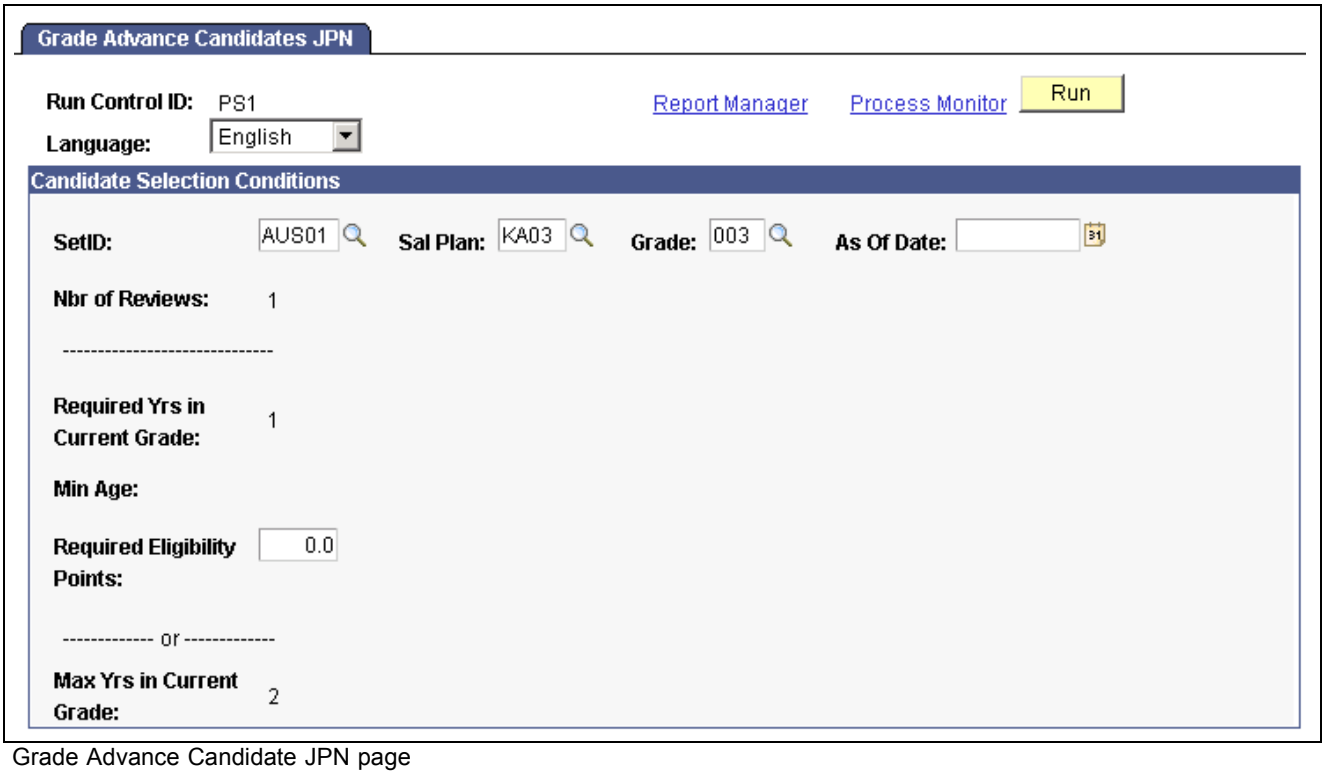
| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Job Grading by Evaluation Pts. | RUNCTL_ASOFDATE | Compensation, Base Compensation, Salary Plan Reports, Job Grading by Evaluation Pts. | Generate the Job Grading by Evaluation Points report (CMP002). This report lists each salary grade in the organization, with salary data for all the titles that are within that grade that is ordered by the job evaluation point assignment. The report includes all titles that are within that grade that is ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in the 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_ASOFDATE | Compensation, Base Compensation, Salary Plan Reports, Ratio Analysis | Generate the Compa-Ratio Analysis report (CMP003). The report lists each worker in the salary grade and the midpoint amount of the salaries that are in that grade. For each worker, the report lists job code, title, name, and department ID. The report displays those workers whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.* |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Below Minimum Analysis | RUNCTL_ASOFDATE | Compensation, Base Compensation, Salary Plan Reports, Below Minimum Analysis | Generate the Below Minimum Analysis report (CMP004). This report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose worker status is active, leave of absence, suspended, or leave with pay. |
| Above Maximum Analysis | RUNCTL_ASOFDATE | Compensation, Base Compensation, Salary Plan Reports, Above Maximum Analysis | Generate the Above Maximum Analysis report (CMP005). For each worker, the report shows the job code and title, name, department ID, the maximum amount, the worker's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those workers whose worker status is active, leave of absence, suspended, or leave with pay. |
| Salary History by Department | PRCSRUNCNTL_LC_HR | Compensation, Base Compensation, Compensation Reports, Salary History by Department | Run the Departmental Salaries report (PER012). This report provides an alphabetical list of workers 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, Base Compensation, Salary Plan Reports, Grade Advance Candidates JPN | Run the (JPN) Grade Advance Candidate List report (PER062JP) that lists workers who are eligible to advance from the grade that you enter.<br><br>The Grade Advance Candidate List Report is the output from the RUNCTL_PER062_JPN process. It lists all workers who are candidates for a grade advance because they meet the appropriate criteria. The criteria for eligibility for advancement is defined at grade level. The criteria include the results of worker reviews. |

## (JPN) Running the Grade Advance Candidate Report

Access the Grade Advance Candidate JPN page.




Grade Advance Candidate JPN page

**SetID** Enter the setID. This is necessary because salary plans can be used in multiple sets.

**Sal Plan** (salary plan) Enter the salary plan of the grade for which you want the candidate list.

**Grade** Enter the grade on which you want the eligibility report.

**Nbr of Reviews** (number of reviews) Displays the number of reviews that you specify for inclusion in the eligibility points count. This information comes from the Grade Advance Criteria page.

**Required Yrs in Current Grade** (required years in current grade) Displays the number of years that workers must be in this grade before they become eligible to advance from this grade. This information comes from the Grade Advance Criteria page.

**Min Age** (minimum age) Displays the minimum age that workers must reach before they can advance from this grade. This information comes from the Grade Advance Criteria page. The system uses the worker's education level age when determining this minimum age.

**Reqd Elig Pts** (required eligibility points) Even though you 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 workers become eligible to advance from this grade if you reduce or increase the required points respectively.

*—or—*

**Max Yrs in Current Grade** (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 workers who reach the maximum years for the grade, irrespective of all other criteria.

**Review ID** Displays the review IDs and descriptions of all the reviews that are included in the eligibility points count. There are be as many as you specify 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 or review ID and the next most recent effective date or review ID.

**Review Type** Displays the review type from the Review Definition page.

**Review Weight** Displays the review weight that you enter on the Grade Advance Criteria page. If you use the nonweighted, or simple average, method and don't add any review sequences or weightings, these fields are blank. The system just totals the review points and divides by the number of reviews from which those points came.

# CHAPTER 5

# Using Configurable Matrices

This chapter provides an overview of configurable matrices, and discusses how to:

- Define sources for configurable matrices.
- Define results for configurable matrices.
- Define and maintain configurable matrices.
- Use special rules to create configurable matrices.
- Copy matrices.
- Build a special rate matrix—tutorial.

## Understanding Configurable Matrices

A configurable matrix is a special type of lookup table that can be designed and populated by the administrator. The administrator specifies the inputs (or criteria) that will be used as lookup variables and the outputs (or results) that the table will return for specific combinations of input values.

### Examples of Configurable Matrices

These examples illustrate the concept of matrices and their intended usage.

#### Simple Rate Matrix

This matrix is used to determine the compensation rate for a worker based on his department.

| Department ID — Input | Rate (US per hour) — Output |
|---|---|
| 10012 | 10.00 |
| 10013 | 12.00 |
| 10014 | 14.00 |
| 10015 | 16.00 |

In this example, the single input is the *Department* of the worker and the output is the *Rate*. If a worker is in Department 10012, the pay rate is 10.00 USD per hour

#### Matrix with Two Inputs and One Output

This is an example of a matrix with two inputs and one output:

| Time with Company (months) — Input | Site Risk — Input | Rate (USD per hour) — Output |
|---|---|---|
| 0–24 | Low | 10.00 |
| 0–24 | Medium | 12.00 |
| 0–24 | High | 14.00 |
| 25–60 | Low | 12.00 |
| 25–60 | Medium | 14.00 |
| 25–60 | High | 15.00 |
| 61–120 | Low | 14.00 |
| 61–120 | Medium | 14.00 |
| 61–120 | High | 16.00 |
| 121–7200 | Low | 16.00 |
| 121–7200 | Medium | 17.00 |
| 121–7200 | High | 18.00 |

In this matrix, the rate is determined by a combination of the time in company and the risk level of the work site. A worker who has been with the company for 50 months and works at a Medium risk site will be compensated at the rate of 14.00 USD per hour.

## Matrix with Multiple Outputs of Different Types — Market Pay Matrix Example

The outputs of a matrix can be of different types, and the following example is a matrix with multiple outputs, one of which is a percentage. This matrix is used to track the compensation rates for a job at various percentiles and different geographical areas. It also tracks rates for standard compensation figures such as Total Cash Compensation.

In this example, the only input is the geographical area. All other columns are outputs. This matrix can be associated with a specific job code, so that the compensation administrator can track market pay for that job code across different geographical regions.

| Geography | Currency | Base 25th | Base 50th | Base 75th | Base 100th | Base Market Reference | Variable Target Percent | Mean Total Compen-sation | Total Compen-sation Reference |
|---|---|---|---|---|---|---|---|---|---|
| NORTHWEST REGION | USD | 26,000 | 27,00 | 27,500 | 28,000 | 27,000 | 12.00 | 29,000 | 30,000 |
| MID ATLANTIC REGION | USD | 24,000 | 25,000 | 25,500 | 26,000 | 25,000 | 10.00 | 27,000 | 28,000 |
| SOUTHWEST REGION | USD | 27,000 | 28,000 | 28,500 | 29,000 | 28,000 | 11.00 | 30,000 | 31,000 |

### Matrix With Calculated Results

You can also embed calculations in the results returned by a matrix. In this example, the matrix returns rates calculated by applying a formula:

| Step — Input | Reference — Output | Percentage to Apply — Output |
|---|---|---|
| 1 | Base Salary | 5 |
| 2 | Grade Range Maximum | 90 |
| 3 | Base Salary | 4 |

For example, if the worker's base salary was 10,000 USD and if he was on Step 1, this matrix will return a rate (Base Salary x 5%) = 10,500 USD.

**Note.** The system performs the appropriate checks to find the worker's *current* base salary. The base salary was not stored on the matrix.

## Understanding Matrix Inputs and Outputs

This section discusses matrix inputs, outputs, and matrix evaluation rules for configurable matrices.

### Matrix Inputs

Each matrix can have one or more inputs. These inputs are the search criteria against which you will evaluate a specific worker. The maximum number of inputs is 15. Each input is defined in the form of one or more source IDs.

Human Resources contains a number of predefined source IDs as system data. You can use those to build your configurable matrices. However, you can create also additional custom source IDs.

See Chapter 5, "Using Configurable Matrices," Defining Sources for Configurable Matrices, page 55.

### Matrix Outputs

The outputs of a matrix are available in the form of Result IDs. You can have a maximum of 30 outputs for one matrix. The outputs are categorized into *result types*, based on their data format or the rules used to derive the result.

Base Compensation contains a number of predefined Result IDs as system data. These results can be used as outputs for the configurable matrices. However, you can create additional custom result IDs.

See Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices," page 213.

### Matrix Evaluation Rules

Whenever the matrix is invoked, the system attempts to match the worker's data with keys in the matrix. The system checks all input variables against the keys defined for each input. The order of checking will be the same as the order in which the inputs were defined. At the first row where all input variables match the keys specified in the matrix, the system will return all result IDs for that row. When you are defining search keys, the system ensures there are no duplicate rows. You cannot have any blank search keys.

### Using Wildcards as Search Keys

You can use wildcards when defining search keys. After you have entered your specific key values for one input, you can optionally add a wildcard key. This means that if there is no explicit match against any of the other key values, the wildcard key will be considered a match. For example, assume you defined Dept ID as an input. You want to list specific non-zero rates for Dept ID's 101, 102, 103, and 104. However, for all other departments, you want a rate of 0. In this case, you would specify a total of five keys for the input, 101, 102, 103, 104 and '*' which represents a wildcard. Any worker not in Dept 101, 102, 103, 104 would match the wildcard and would get a rate of 0. This allows you to have a default rule defining what to do if the worker's data does not match any of the key values.

## Understanding Matrix Types

This section discusses the three types of matrices you can create using the configurable matrices feature.

- Market pay matrix.

  This matrix that captures market pay information for a given job. The market pay matrix can then be associated with specific job codes by using the Associate Mkt Pay to Job Codes page (Set Up HRMS, Product Related, Compensation, Market Pay, Associate Mkt Pay to Job Code). You can also associate the matrix directly on the Market Pay Match page of the Job Code definition component (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match).

- Rate matrix.

  This matrix is used to store compensation rates based on multiple criteria. You can then associate a rate matrix to a rate code defined in the Comp Rate Code Table page (Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table). The rate matrix can return compensation rates which are directly listed in the matrix, or derived using formula-based result IDs.

- Salary increase matrix.

  This matrix is used to store the salary increase guidelines, as percentages of base salary. These guidelines are usually based on the worker's performance ratings and ratios such as Compa-Ratio and Percent-In-Range. You can attach this matrix to specific rate codes on a group budget (Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, Budget Components). The system applies the appropriate increases to workers when calculating the budget, based on the criteria in the matrix.

**Note.** Depending upon the page, you can only associate a specific type of matrix to that page. For example, the system will only retrieve rate matrices when searching on a rate code definition page. Similarly, you can only associate market pay matrices to a job code.

**Important!** You cannot associate configurable matrices to seniority pay rate codes.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Setting Up Administer Compensation," Defining Rate Codes.

See Chapter 7, "Budgeting and Planning Salary Increases," page 109.

### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Market Pay"

# Understanding Matrix Displays

This section discusses how the system displays a configurable matrix.

## Matrix Display

There many instances within compensation processes where data is presented and used in a two-dimensional table, or matrix form. An example is in salary increase guidelines which store increase percentages for different performance ratings and percent-in-range ratios. How this data is presented affects how easily it can be understood. When defining inputs for a matrix, you have the option to specify one of the inputs to be the column header instead of the row header. The following section explains this concept further.

## Displaying Inputs as Columns — Example

Assume that you have 2 inputs (step and department) and one output (the rate). The matrix can be displayed in 2 ways.

Example 1: Each combination of inputs is like a row header.

| Step | Department | Percent Rate |
|---|---|---|
| 1 | 100 | 2 |
| 1 | 122 | 4 |
| 2 | 100 | 6 |
| 2 | 122 | 8 |
| 3 | 100 | 10 |
| 3 | 122 | 12 |
| 4 | 100 | 14 |
| 4 | 122 | 16 |

Example 2: One input as a column header

This display is easier to understand because the Department input was set to *Column* rather than *Row*, which is the standard.

| | Department | |
|---|---|---|
| Step | 100 | 122 |
| 1 | 2 | 4 |
| 2 | 6 | 8 |
| 3 | 10 | 12 |
| 4 | 14 | 16 |

# Defining Sources for Configurable Matrices

To define sources for configurable matrices, use the Define Sources (WCS_SOURCE_DEFN) component.

**Note.** You cannot create new source types.

This section discusses predefined source types and discusses how to:

- Define sources based on addresses.
- Define sources based on dates.
- Define sources based on ratios.
- Define sources based on performance ratings.
- Define sources based on employee information.
- Define sources for related employee information.
- Define sources based on position information.
- Define sources based on related position information.
- Define sources based on geographical areas.
- Define sources based on salary grade step rates.
- Define sources based on length of time.
- Define sources based on supplied information.
- Define sources based on a matrix.

### See Also

Appendix A, "Predefined Source IDs and Result IDs for Configurable Matrices," page 213

## Understanding Source Types

This table explains the predefined source types that are available and shows you which type to use when defining your own source IDs. These sources types are system delivered:

| Source Type | Description |
|---|---|
| ADDRESS | Employee Address. You can select fields from worker's address information. |
| DATES | Significant Dates. You can select a date from a predefined list of significant dates, such as date of hire, date of termination, and so on. |
| EMPINFO | Employee Information. You can select fields from core tables directly related to workers. |
| EMPRELATED | Related Employee Information. You can select fields from tables related to core tables for worker information. |

| Source Type | Description |
|---|---|
| GEOGRAPHY | Geography. You can define Source IDs to represent Geographical Areas. |
| MATRIX | You can define Source ID that represents a value indirectly derived from another matrix. |
| POSINFO | Position Information. You can select fields from core tables directly related to position information. |
| POSRELATED | Related Position Information. You can select fields from tables related to core tables for position information. |
| RATING | Performance Rating. You can define sources to represent performance rating by (performance) document type. |
| RATIOS | Rate Ratios. You can define sources to represent one of the three available ratios: Compa-Ratio, Job-Ratio, and Percent-in-Range. |
| STEPRATE | Step Rate from Employees Plan. You can define a Source to represent the compensation rate for a specific Salary Grade Step from the worker's Salary Admin Plan. |
| SUPPLIED | Supplied by Caller. This type is used when there is no lookup to any table field required, and the calling program or component will directly supply the actual value for the source. |
| TIMESPAN | Length of Time. You can define sources that measure the timespan between current date and a pre-specified date or significant dates on the worker's JOB record. |

## Common Elements Used in this Section

**Effective Date** The effective date of the source ID definition.

**Description** Description of the source ID.

**Source ID** The unique name for the input to be used in the configurable matrix.

**Source Type** Indicates the type of data to which the source refers. These are system delivered and you cannot create additional source types.

**Status** Select *Active* or *Inactive*.

**Important!** Sources must have a status of Active to be used to build configurable matrices.

**Comment** Add any relevant comments for this source.

**Default Label** Enter the name for the source that will appear as row or column header when the matrix is displayed.

**Element** Select the element from the available list of values, usually a field from a table. This will become the source of search keys for the matrix.

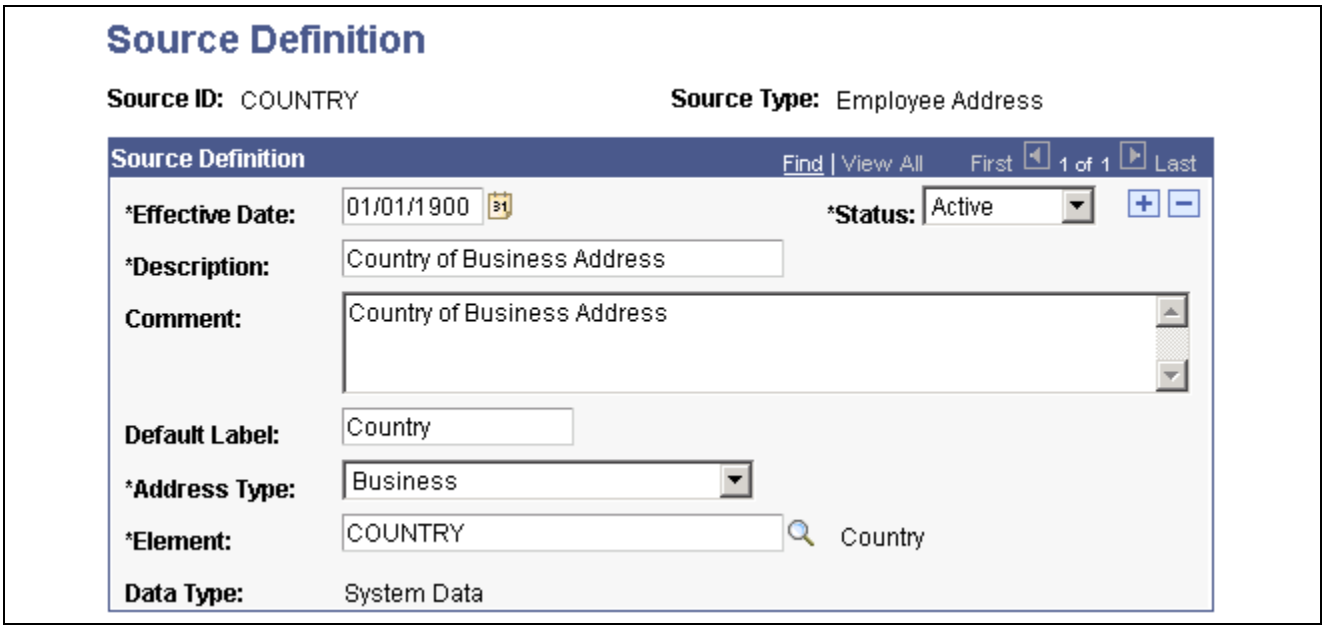
**Data Type** This value is automatically set to *System Data* or *Customer Data*. System-defined source definitions will be set to *System Data*. You should not modify those definitions. When you create new source IDs, the data type will be set to *Customer Data*.

## Page Used to Define and Maintain Sources for Configurable Matrices

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Source Definition | WCS_SO_EMPL | Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources | Maintain sources. Use to provide inputs (row information) for configurable matrices.<br><br>**Note.** The fields on this page differ depending upon the Source Type that you select. |

## Defining Sources Based on Addresses

Access the Source Definition page and select *ADDRESS* as a Source Type when creating a new source.




Source Definition page - Employee Address source type

You can create a source that refers to any address type (home, work, mailing, and so on) and any field (address line, city, state, country) on the address.

**Address Type** Select the type of address.

**Element** Select the field that will define this source.

## Defining Sources Based on Dates

Access the Source Definition page and select *DATES* as a Source Type.

**Type of Date** Select the date type for this matrix. Values are:

- *Date of Last Increase*: The date of the last increase which is the Comp Rate on the worker's COMPENSATION record.
- *Date of Last Var Comp Award*: The date of last award paid out using the Variable Compensation functionality.
- *Hire Date*: The hire date on the EMPLOYMENT view which is specific to Empl Record number.
- *Seniority Date*: The company seniority date on the EMPLOYMENT view.
- *Start of Current Grade*: The grade entry date on worker's JOB record.
- *Start of Current Job*: The job entry date on worker's JOB record.
- *Start of Current Position*: The position entry date on worker's JOB record.
- *Start of Current Step*: This is the Step entry date on worker's JOB record.
- *Termination Date*: The termination date on the EMPLOYMENT view.

## Defining Sources Based on Ratios

Access the Sources Definition page and select *RATIOS* as a Source Type.

The system will calculate the appropriate ratio for the worker dynamically at runtime. The system uses the salary ranges based on the effective date of the transaction.

**Rating Type** Select one of the values:

- *Compa Ratio*
- *Job Ratio*
- *Percent in Range*

## Defining Sources Based on Performance Ratings

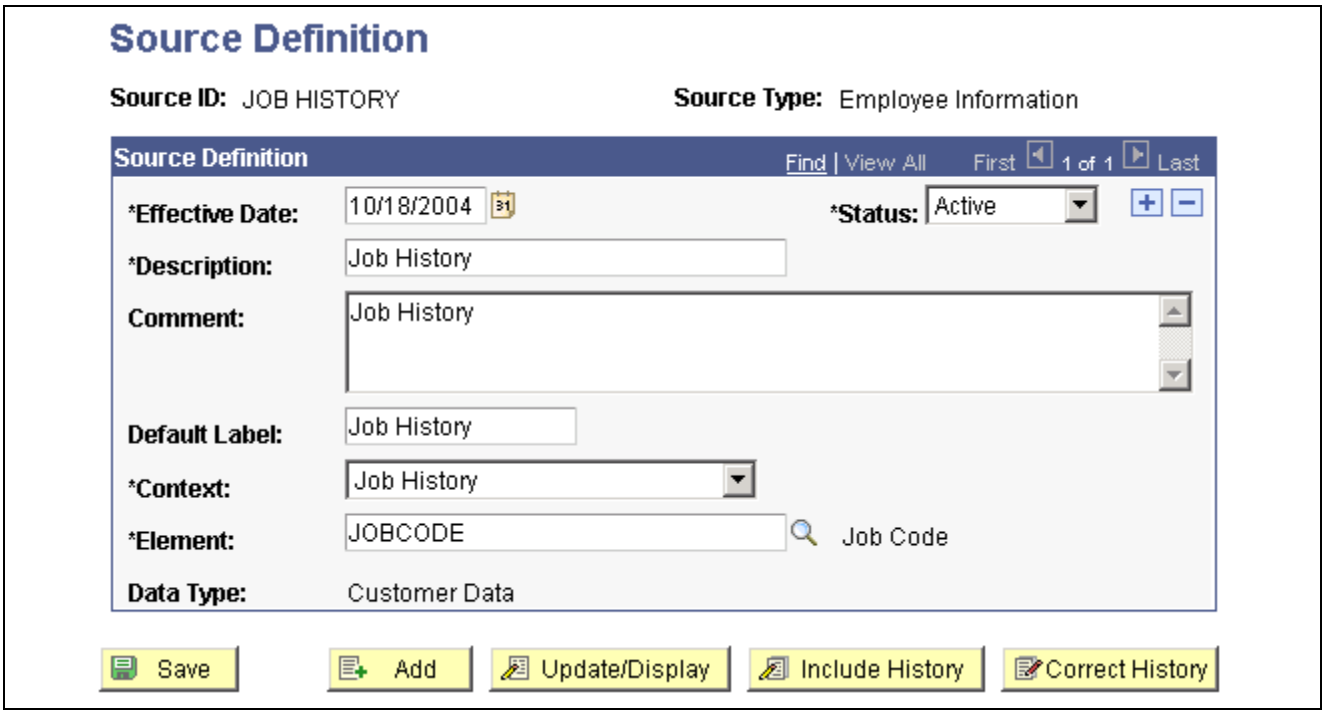
Access the Sources Definition page and select *RATING* as a Source Type.

**Document Type** Select a performance review document type from the available values. The list of document types will change based on the effective date of the Source ID.

**Element** Select the element that will define this source. The available values come from the EP_APPR record.

## Defining Sources Based on Employee Information

Access the Sources Definition page and select *EMPINFO* as a Source Type.




Source Definition page - Employee Information source type

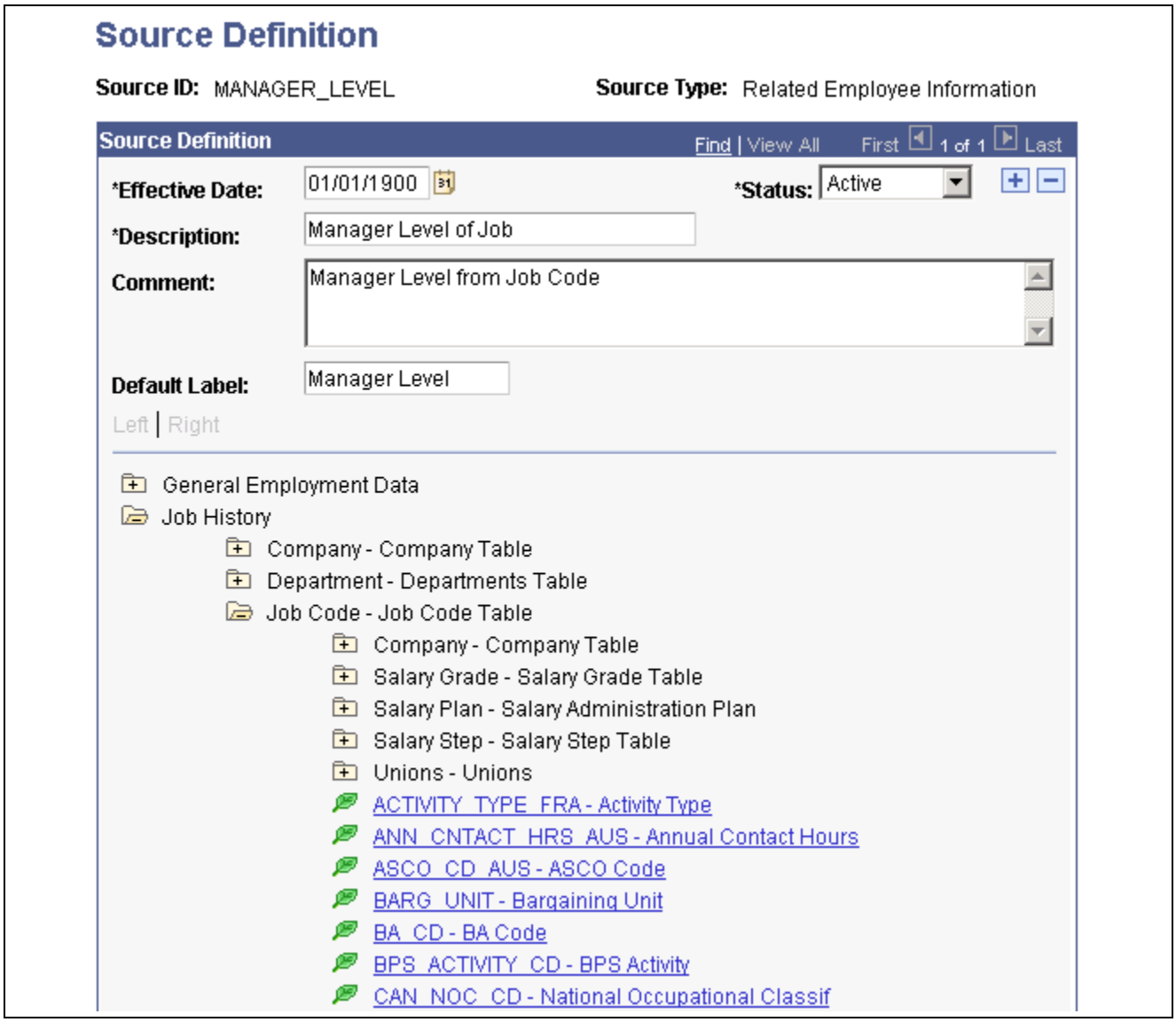
**Context** Select a value. The system will allow you to select an element that is available through one of these contexts. This is the list of contexts, along with sample list of elements that are available within each context:

- *Effective Dated Personal Data*: Full-time student, Highest Education Level
- *Employee Time Profile*: Time Period ID, Rule Element, Time Reporter Status
- *General Employment Data*: Date Last Worked, 5% Owner, Probation Date
- *Job History*: Company, Business Unit, Labor Agreement, Salary Plan, Grade
- *Job Jr*: Assignment ID, Category Rate, Intercompany Transfer Data
- *Names*: First Name, Last Name, Middle Name, Prefix
- *Person Core Objects*: Birth data
- *Person Org Assignments*: Benefit Record, Organizational Instance

**Element** Select the field that will define this source. The prompt list is based on the selected Context.

## Defining Sources Based on Related Employee Information

Access the Source Definition page and select *EMPRELATED* as a Source Type.




Source Definition page: Related Employee Information source type (1 of 2)

Source Definition page: Related Employee Information source type (2 of 2)

Click the folder icon in the tree to open the appropriate related table and then select the appropriate element by clicking the leaf node.

This tree allows you to derive a value from any table related to worker's Job record using the EmplID as a starting point. For example, if you want to use the Manager Level of the worker's Job Code as the source, you can link to it by opening the JOBCODE folder and clicking the Manager Level leaf node. You can use this source type to create source IDs for fields that are not available as system-defined source IDs.

**Element** Select the element that will define this source. The available values are based on the selected Context.

## Defining Sources Based on Position Information

Access the Sources Definition page and select *POSINFO* as a Source Type.

**Element** Select the field that will define this source.

## Defining Sources Based on Related Position Information

Access the Sources Definition page and select *POSRELATED* as a Source Type.

View various worker related information such as general employment data, job history, names, and so on.

**Position Data** Click the folder icon in the tree to open the appropriate related table and then select the appropriate element by clicking the leaf node.

This tree allows you to derive a value from any table related to the position of the worker using the position number as a starting point. For example, if you want to use the Grade of the worker as the source, you can link to it by opening the Salary Grade folder and clicking the Grade leaf node.

## Defining Sources Based on Geographical Areas

Access the Sources Definition page and select *GEOGRAPHY* as a Source Type.

This source type is intended to be used to create sources that will always refer to Geographical Area definitions. There is one system-defined Source ID of *GEOGAREA*. However, you can create another source if you want a different name and label.

---

**Note.** There is no automatic validation of key values for geographical areas. However, you can specify the prompt table GEOGRAPHY_TBL, and prompt field GEOGRAPHY_ID when you add GEOGAREA as the input in the matrix component.

---

## Defining Sources Based on Salary Grade Step Rates

Access the Sources Definition page and select *STEPRATE* as a Source Type.

This source returns the standard compensation rate for a given grade and step, within the worker's salary administration plan. This type of source can be used to create rate matrices where the rates are dependent upon or related to rates on one or more grades and steps on the worker's salary administration plan.

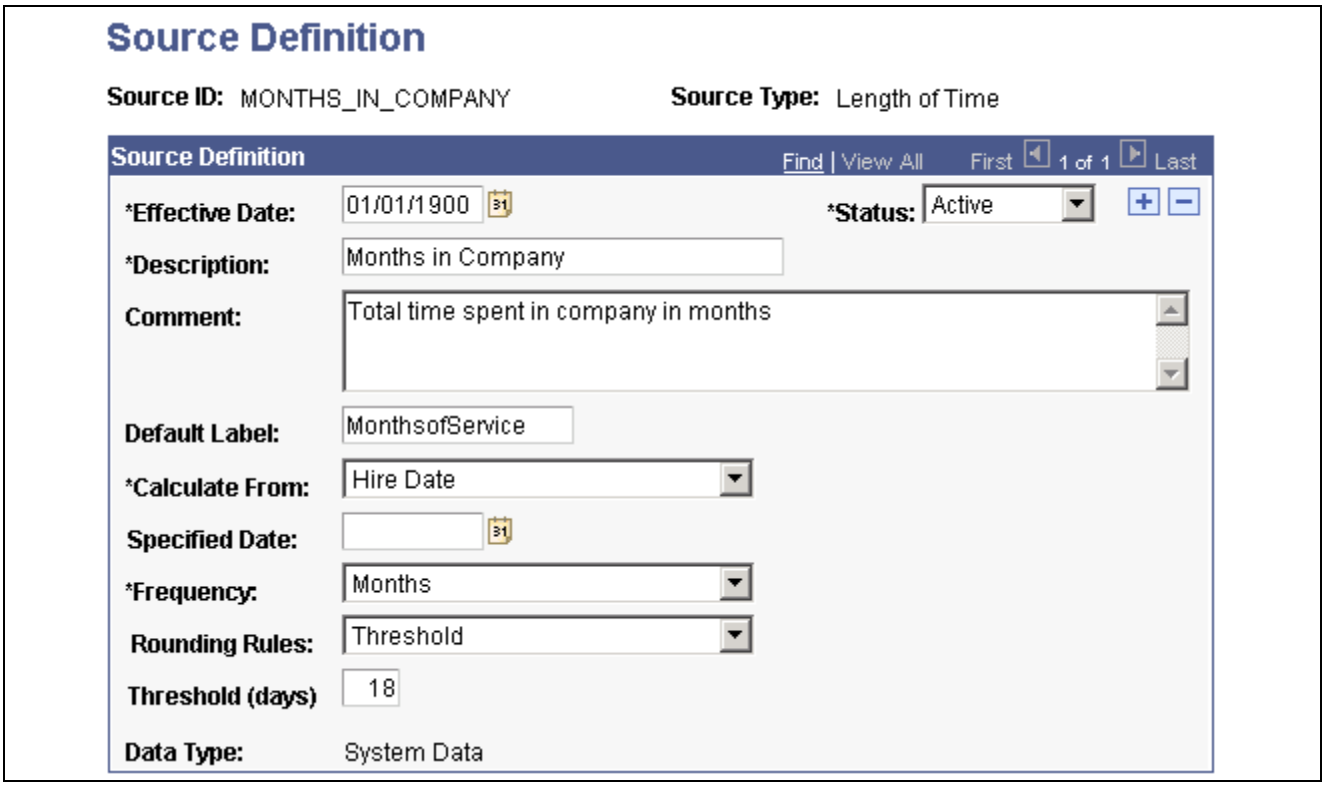
**Salary Grade** Enter the grade (from the worker's salary plan) to which this source will refer.

**Step** Enter the Step within that grade whose rate you want to use as the source.

**Frequency** Enter the frequency in which you want the rate returned: (*Annual*, *Daily*, *Hourly*, or *Monthly*.

## Defining Sources Based on Length of Time

Access the Sources Definition page and select *TIMESPAN* as a Source Type.




Source Definition page - Timespan source type

This source allows you to define as input the length of time elapsed between current (as of) date and a specified reference date. For example, if you want to create a rate matrix that will include pay rates based on how long the worker has been in the company, in that job, or in that grade, then you will define a source of this type.

**Calculate From** Select the type of date from which you want the length of time to be calculated. The available dates are:

- *Date of Last Increase*
- *Date of Last Var Comp Award*
- *Hire Date*
- *Seniority Date*
- *Specific Date*
- *Start in Current Grade*
- *Start in Current Job*
- *Start in Current Position*
- *Start in Current Step*
- *Termination Date*

**Specified Date** Enter the specific calendar date from which you want the length of time to be calculated.

**Important!** Specified Date and Calculate From options are mutually exclusive. If you enter a specified date, you cannot select a date in the Calculated From field. If you select a date in the Calculated From field, you cannot enter a specified date.

**Frequency** Select the frequency in which you want the length of time to be calculated. You can select *Hours, Days, Weeks,* or *Months*.

**Rounding Rules** Select a value that will represent the type of rounding to be applied to the timespan.

- *Anniversary:* This type of rounding will use anniversary date or time to round up or down. The calculations are performed as follows:
  - Hours and Days: This option does not apply. The system simply returns hours or days based on actual timespan.
  - Weeks and Months: This option will always round down to the nearest *whole* unit. For example, 4 weeks and 6 days will be rounded to 4 weeks, and 8 months and 29 days will be rounded down to 8 months.
- *Threshold:* This type of rounding offers more granular control on rounding. The calculations are performed as follows:
  - Hours and Days: No rounding.
  - Weeks and Months: Rounding depends on the threshold.

    If the number of days in threshold is less than or equal to the remainder from the calculated timespan, the system will add one more unit. For example, assume that the frequency was set to Weeks and the threshold was set to 5 days. If the timespan was calculated as 4 weeks and 5 days, the system will return 4 + 1 = 5 weeks as the final value. However if the threshold was 6 days, the system would return 4 weeks.

    For a frequency of Months, if the timespan was 2 months and 15 days and threshold was set to 20 days, the system will return 2 months. If threshold was 15 days or less, the system would return 3 months.

**Threshold (Days)** Enter the number of days to be used with the Rounding Rules field.

## Defining Sources Based on Supplied Information

Access the Sources Definition page and select *SUPPLIED* as a Source Type.

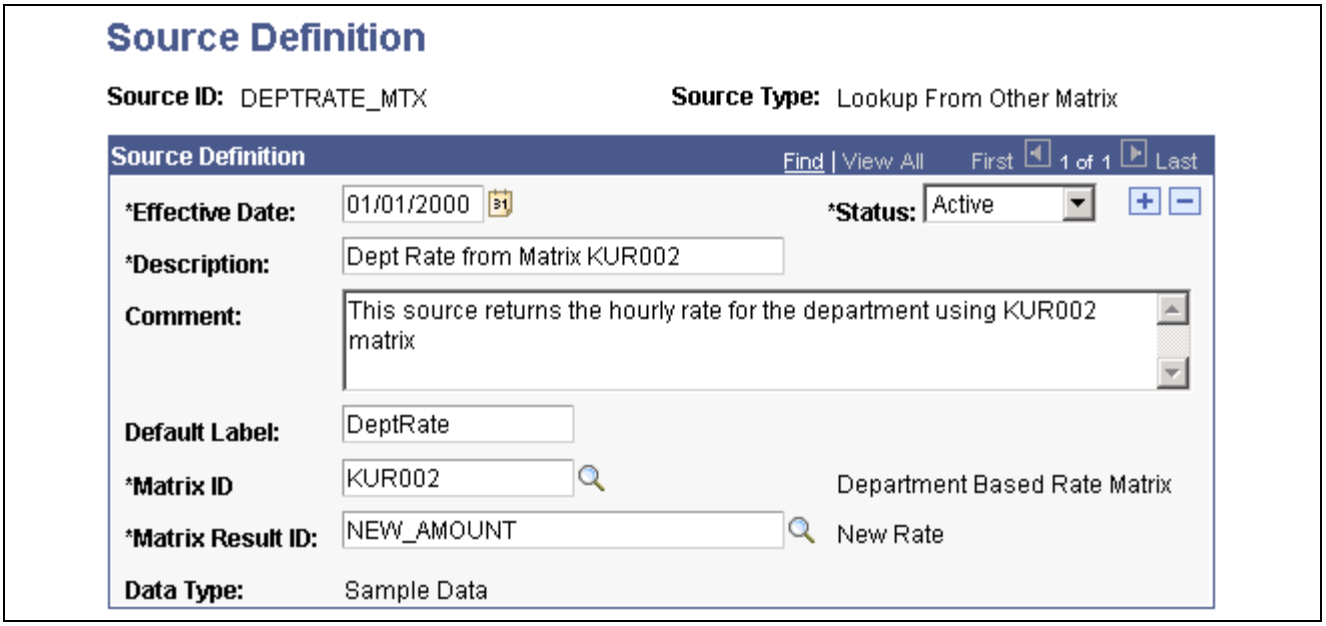
This type of source is used when the component that will use the matrix will pass the appropriate Input value (for the worker) directly, so that there is no lookup to any table to derive the value.

**Type of Data** Select from these values:

- *Character*
- *Date*
- *Number*

# Defining Sources Based on a Matrix

Access the Sources Definition page and select *MATRIX* as a Source Type.




Source Definition page: MATRIX source type

With this source, the system will evaluate the key for the input dynamically by referring to another matrix and use one of the results from that matrix as the key value.

See Chapter 5, "Using Configurable Matrices," Defining Inputs for Matrices, page 80.

**Matrix ID** Select from the list of available matrices.

**Matrix Result ID** Select the result ID (output) from the matrix that will be used as the Source ID.

## Health Benefits Rates Using a MATRIX Type Source ID — Example

Suppose you were creating a matrix to determine health benefit allowance amounts. However you wanted to base the health benefits on standard hourly rates for each department. If the hourly rates are below certain amounts, you will give health benefits. This is an example of what the matrix may look like:

| Std Hourly Rate | Health Ben Rate |
|---|---|
| 10–12 | 4 |
| 13–15 | 3 |
| 16–20 | 2 |
| 21–100 | 0 |

In this case, you need a way to dynamically get hourly rates for the worker's department. This is where a Source of type Matrix is useful. In the previous example, you are defining a source that will return the rate for the worker's department. You specify which matrix has department rates, and which Result ID from that matrix is the Rate value.

In the health benefits table, the Std Hourly Rate would be defined using the DEPTRATE_MTX source ID.

# Defining Results for Configurable Matrices

To define results for configurable matrices, use the Define Results (WCS_RESULT_DEFN ) component.

This section provides an overview of results used in configurable matrices, and discusses how to.

- Define results based on the SIMPLECHAR (simple character) result type.
- Define results based on the SIMPLENUM (simple number) result type.
- Define results based on the SIMPLEDATE (simple date) result type.
- Define results based on the INCRBYAMT (increment by amount) result type.
- Define results based on the PCNTOFBASE (percent of base) result type.
- Define results based on the THRESHOLD result type.
- Define results based on the SOURCE result type.
- Define results based on the MATRIX result type.

## Understanding Results for Configurable Matrices

Results (result IDs) represent outputs for configurable matrices. A result ID is simply a standardized name for one of the outputs from a matrix. By using standardized names, the applications and components that query a matrix can know what set and type of results to expect back after they perform a lookup. For example, if you expect to get a percentage value back, the name PERCENTAGE is more intuitive than NUMBER1. If you expect to get an amount that represents a compensation rate, the name COMPRATE is better that just AMOUNT.

There are system-delivered result IDs, but you can also create new ones. The simplest result IDs are freeform values of type, character string, numbers, or dates. Using freeform values, you would enter values into the matrix that would be directly returned to the calling program when the matrix is evaluated. For example, in a rate matrix, the compensation rate can be stored as an AMOUNT result ID that has values of 10, 12, and so on. Note that currency and frequency concepts are derived automatically based on context. The matrix is simply storing the numbers.

There are also advanced Result types where the system will perform a formula-based calculation or a lookup operation and return the final value as the result.

See Appendix A, “Predefined Source IDs and Result IDs for Configurable Matrices,” page 213.

There are four special result types.

- INCRBYAMT (increment by amount).

  See Chapter 5, “Using Configurable Matrices,” Defining Results Based on the INCRBYAMT Result Type, page 70.

- PCNTOFBASE (percent of base).

  See Chapter 5, “Using Configurable Matrices,” Defining Results Based on the PCNTOFBASE Result Type, page 72.

- THRESHOLD.

See Chapter 5, "Using Configurable Matrices," Defining Results Based on Threshold Amounts, page 73.

- SOURCE.

See Chapter 5, "Using Configurable Matrices," Defining Results Based on SOURCE Result Type, page 74.

## Common Elements Used in this Section

**Status** Select *Active* or *Inactive*.

**Important!** Results must have a status of Active to be used to build configurable matrices.

**Comment** Add any relevant comments for this result.

**Default Label** Enter the name for the result.

**Result Usage** Select one or more values to indicate which type of matrices will use this result:

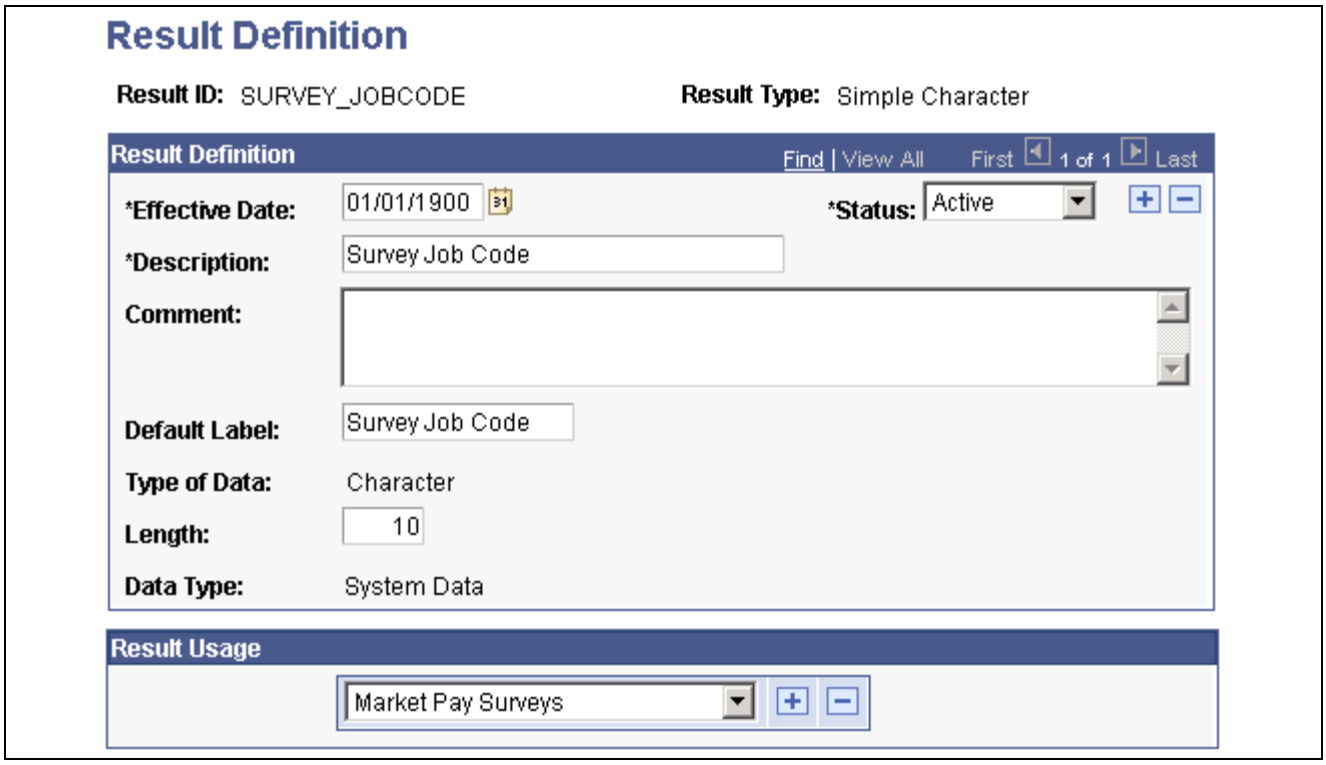
- *Market Pay Surveys*
- *Rate Tables*
- *Salary Increase Matrix*

## Page Used to Define and Maintain Results for Configurable Matrices

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Result Definition | WCS_RES_SIMPLENUM | Set Up HRMS, Common Definitions, Configurable Matrices, Define Results | Maintain results returned from configurable matrices.<br>**Note.** The fields on this page differ depending upon the Result Type that you select. |

## Defining Results Based on the SIMPLECHAR Result Type

Access the Result Definition page and select *SIMPLECHAR* (simple character) as a Result Type.



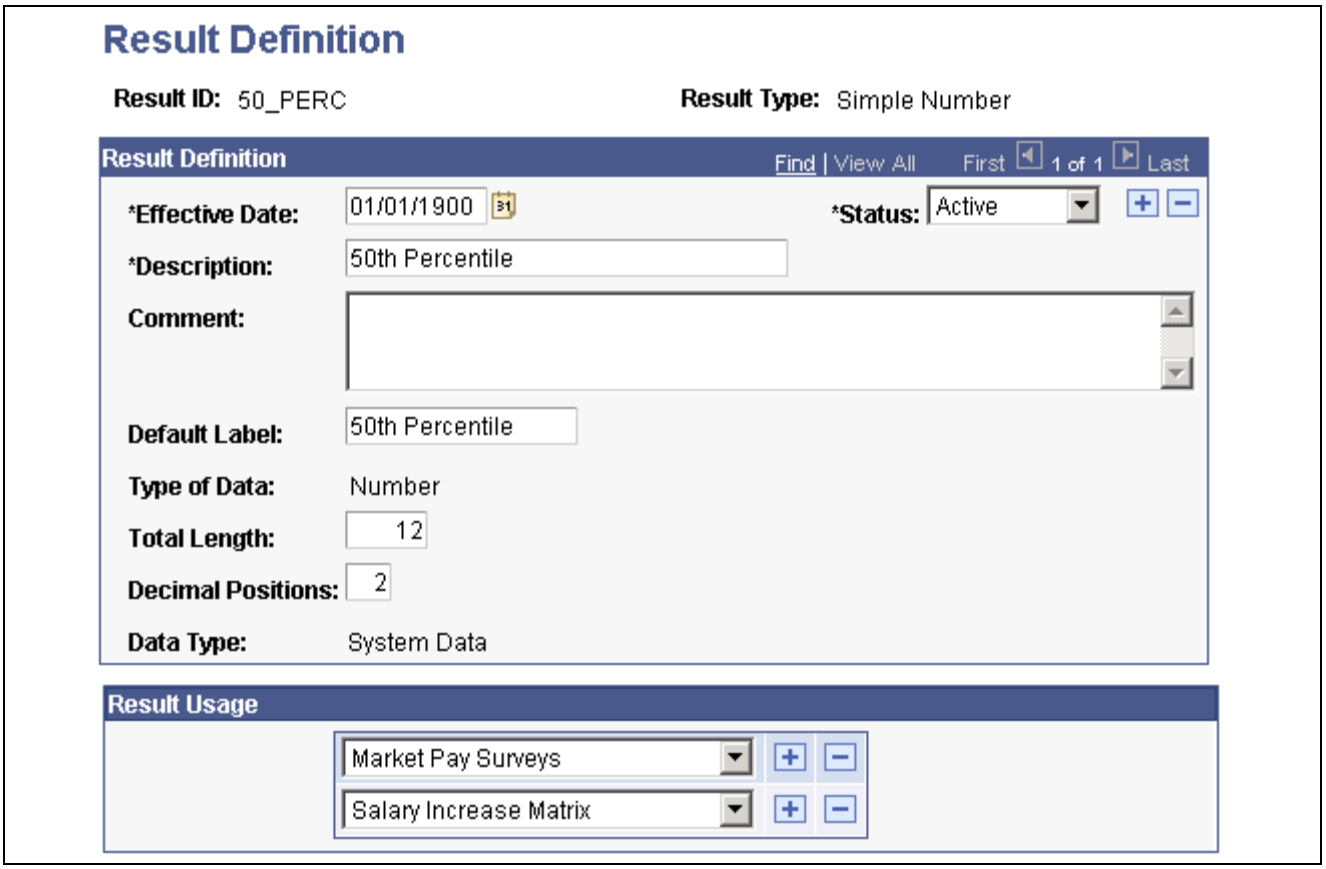

Result Definition page - SIMPLECHAR result type

This type of result ID is used to store simple character string values with an appropriate label. In this screenshot, the result ID SURVEY_JOBCODE is being defined. This Result ID can then be used in a market pay matrix so that compensation specialists can refer to market pay by job code. Since the job code is coming from a survey database, it is stored simply as a character string.

**Length** Enter maximum number of characters allowed to store the value.

## Defining Results Based on the SIMPLENUM Result Type

Access the Result Definition page and select *SIMPLENUM* (simple number) as a Result Type.

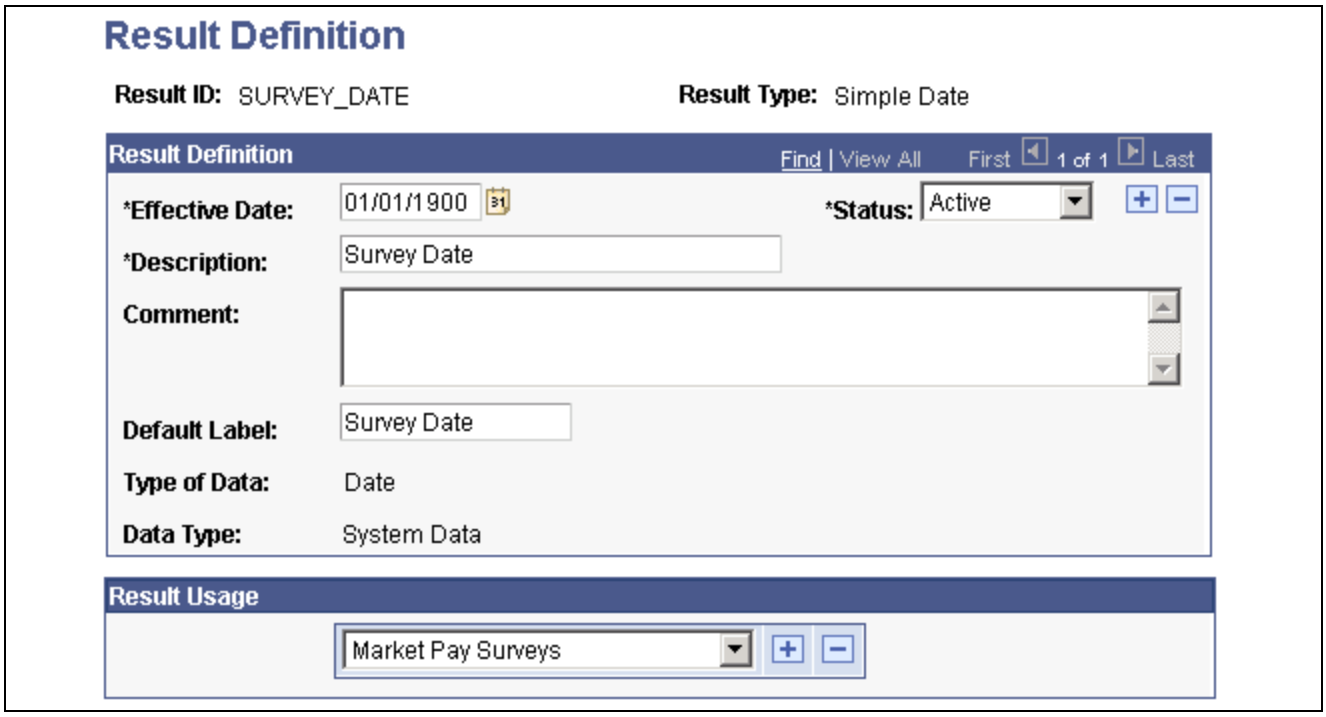



Result Definition page - SIMPLENUM result type

This type of result is used to store simple numbers that represent different values. For example, the 50_PERC result ID can be used in salary increase guidelines matrices and in market pay matrices to track the 50th percentile values for different numbers such as compa-ratios and base compensation market rates.

## Defining Results Based on the SIMPLEDATE Result Type

Access the Result Definition page and select *SIMPLEDATE* (simple date) as a Result Type.

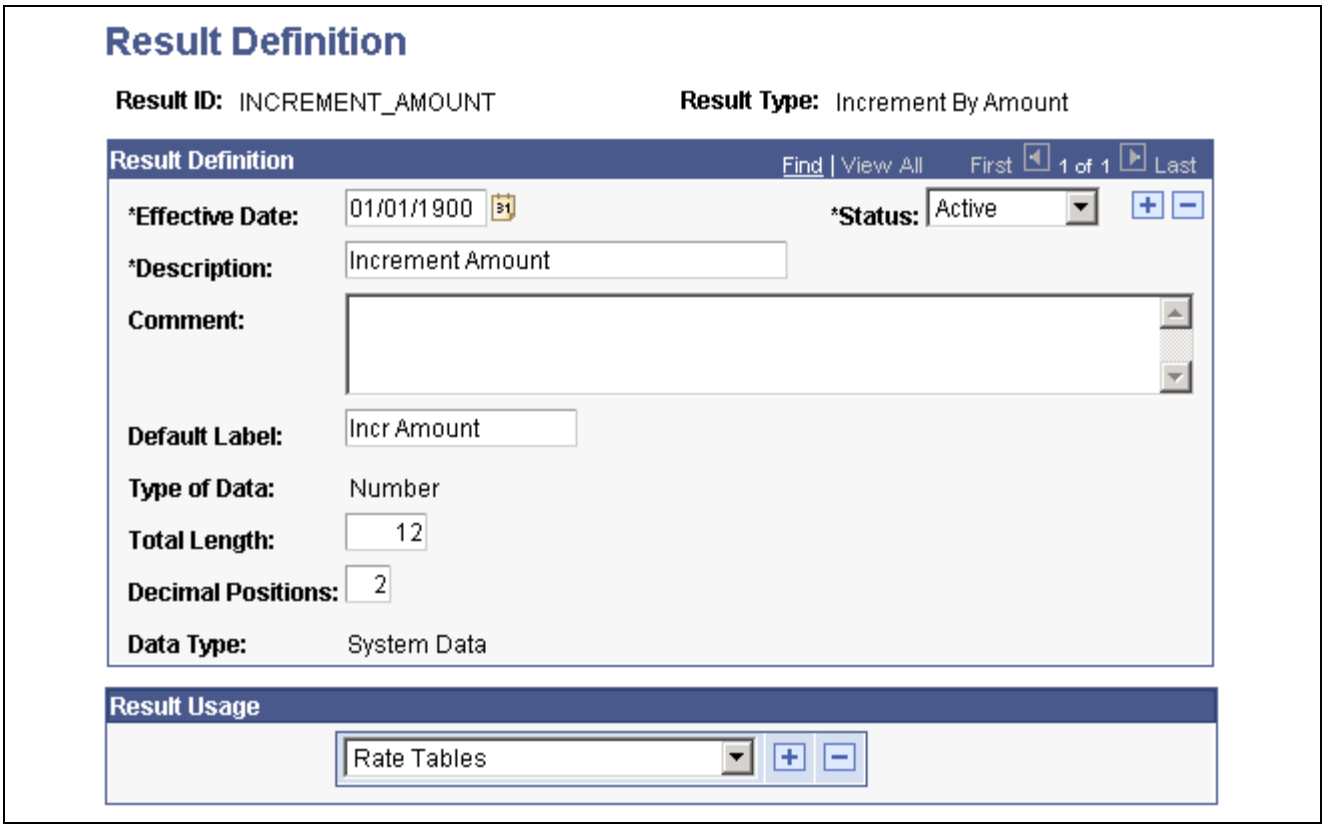



Result Definition page - SIMPLEDATE result type

This result is used to store date values in the matrix. For example, you can use this to track the date of the surveys that are tracked in market pay matrices.

## Defining Results Based on the INCRBYAMT Result Type

Access the Result Definition page and select *INCRBYAMT* (increment by amount) as a Result Type.




Result Definition page - Increment by Amount result type

**Total Length** Enter the number of characters for the result ID.

**Decimal** Indicate how many decimals places to use for the number format.

## Using the Increment by Amount Result Type

This result type will use the number entered as an amount to be applied to another result. It requires you to specify the target Result ID to which this amount will be applied. You can enter both positive and negative numbers, so you can increment or decrement the target value. For example, assume that you have a matrix for calculating rates based on Department. Each department has a fixed base rate (which can vary by department). However you want to calculate the final rate as an increment of the base rate. In this case you will have one Result ID called Base Rate (of type SIMPLENUM), and another Result ID called Final Rate (of type INCRBYAMT). The matrix looks like this:.

This example illustrates the INCRBYAMT result type.

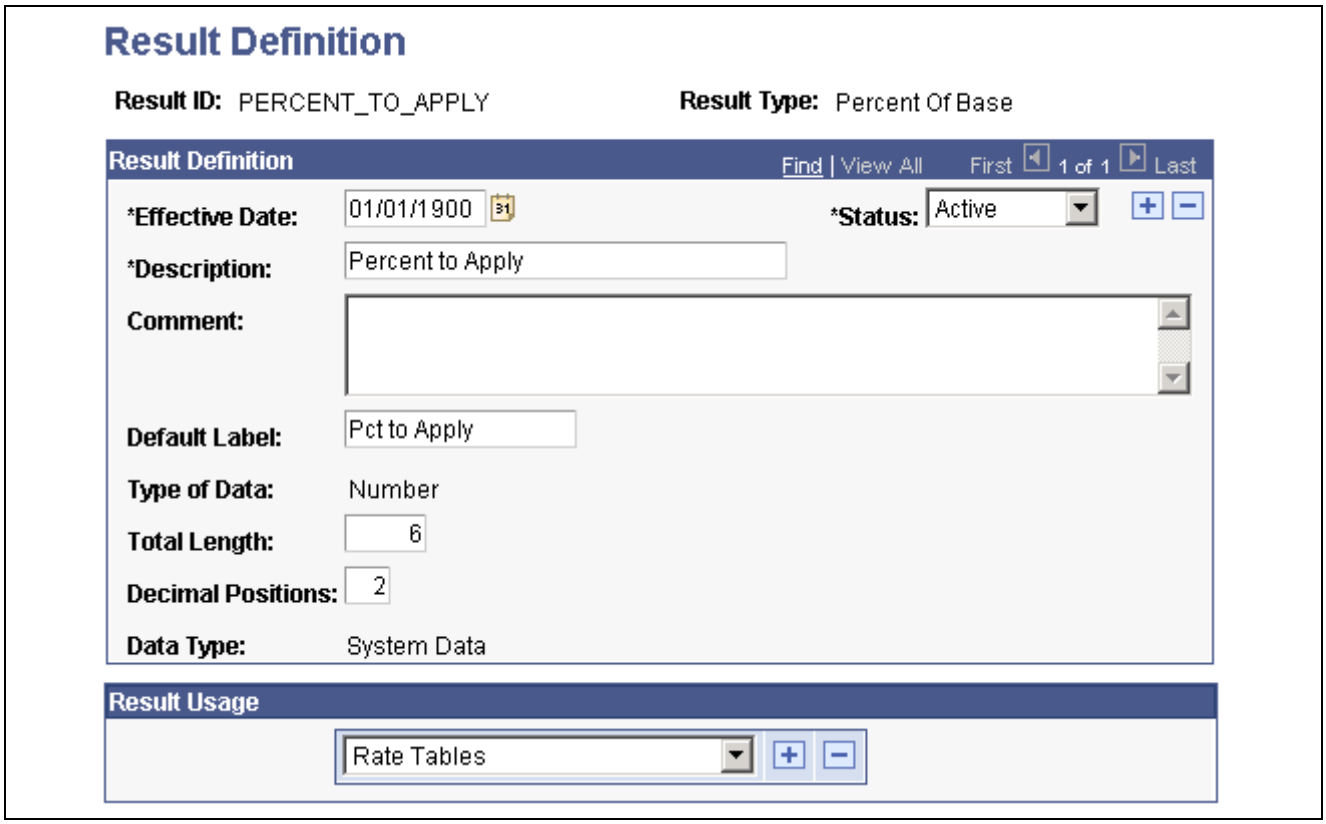
| Dept (Source) | Base Rate (Result) | Final Rate (Result) |
|---|---|---|
| 1010 | 10 | -2 |
| 1020 | 10 | -1 |
| 1030 | 12 | -1 |
| 1040 | 12 | 1 |

Now if a worker is in Dept 1010, the system will return 10 - 2 = 8.00 as the value in Final Rate result ID. Note that when you are defining the matrix, you entered a value "-2" in the cell for Final Rate, but the system uses that value as the amount to add and returns 8 *in the same result ID* at runtime. You do not need to define another result ID to hold the value from the calculation.

If a worker is in Dept 1040, the value in Final Rate result ID will be (12 + 1) = 13.00.

# Defining Results Based on the PCNTOFBASE Result Type

Access the Result Definition page and select *PCNTOFBASE* (percent of base) as a Result Type.




Result Definition page - PCNTOFBASE result type

.

**Total Length** Enter the total length of the number format.

**Decimals** Enter the number of decimal places to use for the number format

## PCNTOFBASE (percent of base) — Example

This result type will use the number entered as a percentage to be applied to another result. You must specify the target result ID to which the percentage will be applied. For example, assume you have a matrix for calculating rates based on Department. Each department has a fixed base rate, (which can vary by department. However, you want to calculate the final rate as a percentage of the base rate. In this case, you will have one Result ID called "Base Rate" (type SIMPLENUM), and another result ID called "Final Rate" (type PCNTOFBASE).

This example illustrates a rate matrix using the PCNTOFBASE result type.

| Dept | Base Rate | Final Rate |
|---|---|---|
| 1010 | 10 | 85 |
| 1020 | 10 | 90 |
| 1030 | 12 | 100 |
| 1040 | 12 | 110 |

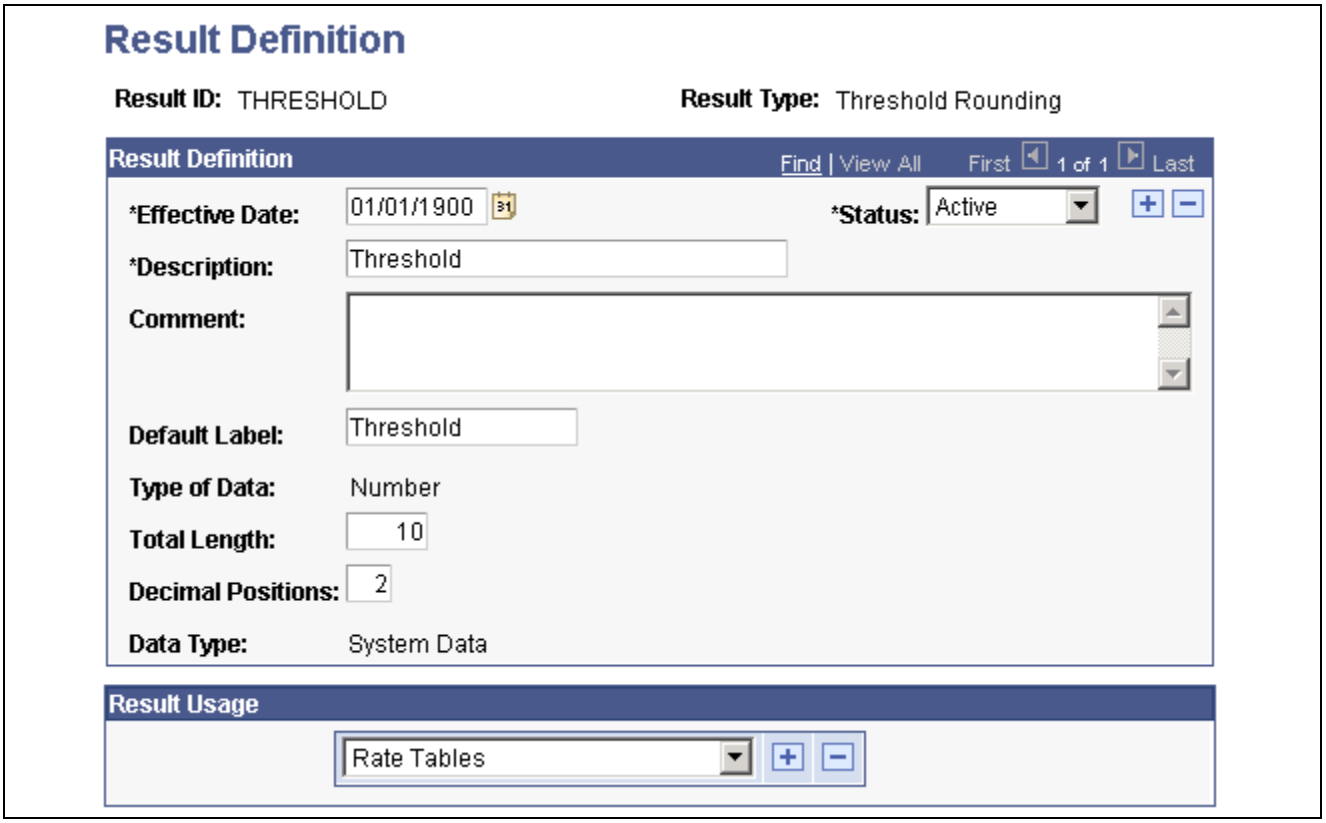
Using this example, if a worker is in Dept 1010, the system will return 10 × 85% = 8.50 as the value in Final Rate result ID.

**Note.** When you defined the matrix, you entered a value 85 for the Final Rate, but the system uses that as the percentage to apply and returns the value *in the same result ID* at runtime. You do not need to define another result ID to hold the value from the calculation.

If a worker is in Dept 1040, the value in Final Rate result ID will be 12 × 110% = 13.20.

## Defining Results Based on Threshold Amounts

Access the Result Definition page and select *THRESHOLD* as a Result Type.



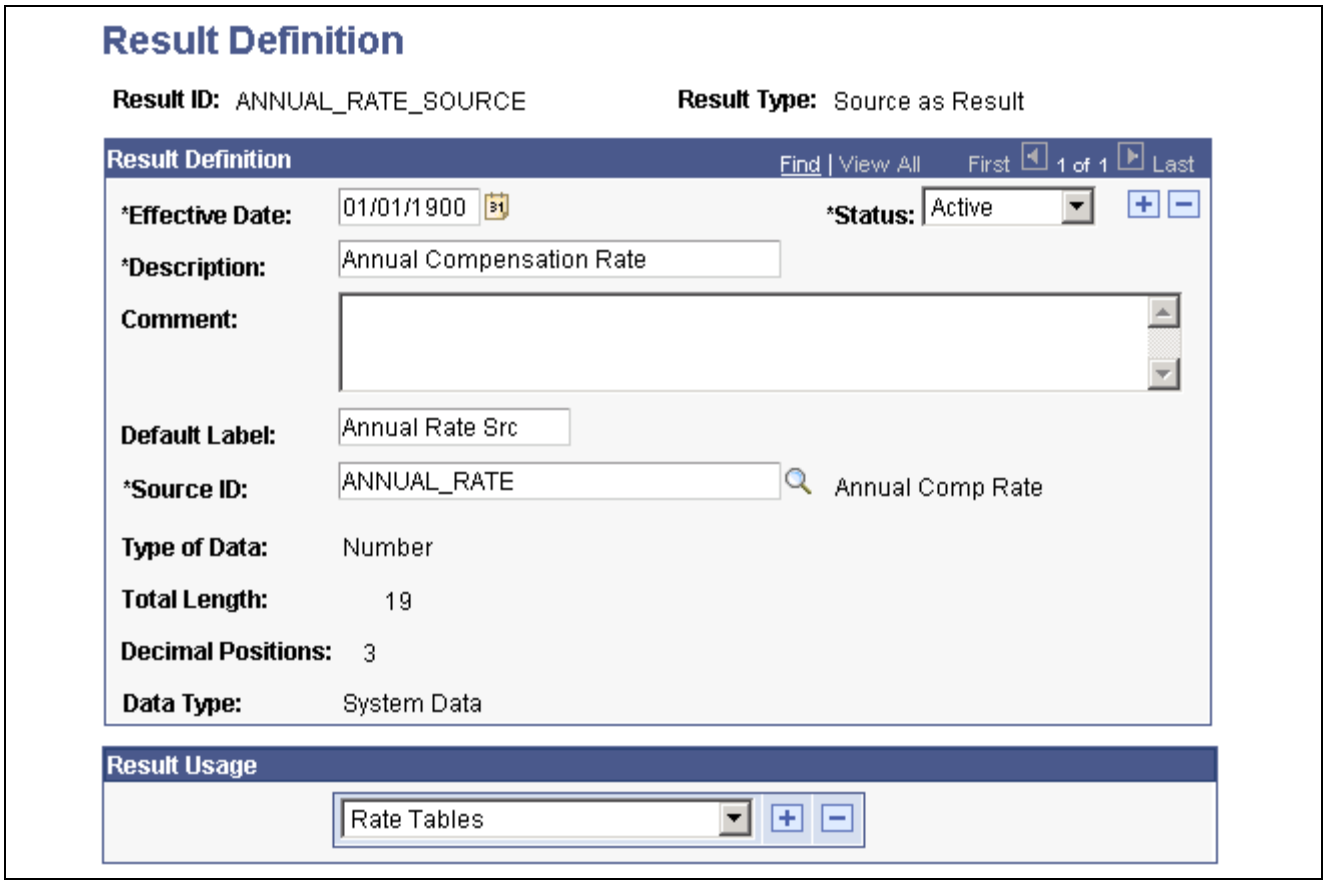

Result Definition page - THRESHOLD result type

This result type allows you to apply rounding based on threshold differences between a *calculated* value and a *reference* value. When used within a matrix, this result requires *two* other Result IDs as parameters. The system takes the first (calculated) result and subtracts it from the second (reference) result. The difference is compared to the amount in the Threshold result. If the difference is less than the threshold amount, the matrix will return the reference value in the Threshold result ID. If the difference is greater, the matrix will return the calculated value.

For example, assume that you are calculating increases in compensation rates based on Salary Steps, but you want to round up to the next step rate when the difference between the calculated rate and the next step rate was less than a specified threshold amount. Assume a worker is on Step 3 at rate of 8.50 USD per hour. The rate for Step 4 is 9.00 USD. For all workers who get a raise such that their new rate is within 0.20 USD of 9.00 USD, you want to automatically set their rate to 9.00 USD. Now if the increase matrix gives the worker a 5 percent increase, the new rate is 8.925 USD. Since this is within 0.20 USD of the 9.00 USD rate for Step 4, the system will automatically return new rate of 9.00 USD.

## Defining Results Based on SOURCE Result Type

Access the Result Definition page and select *SOURCE* as a Result Type.




Result Definition page - SOURCE result type

**Source ID** Select a source ID that this result ID will implicitly evaluate and return the source's value as the final result. The list of possible source ID values come from the Sources Definition.

This type of result ID returns the value of a referenced source ID as its value. The *final* result is the value of the source. As an example, assume you needed to create a rate matrix for calculating bonuses as a percentage of the worker's annual compensation rates. However the bonus percentages will vary by department. Therefore the single input to the matrix is Dept and the two results are Annual Rate and Bonus Pct.

The matrix looks like this:

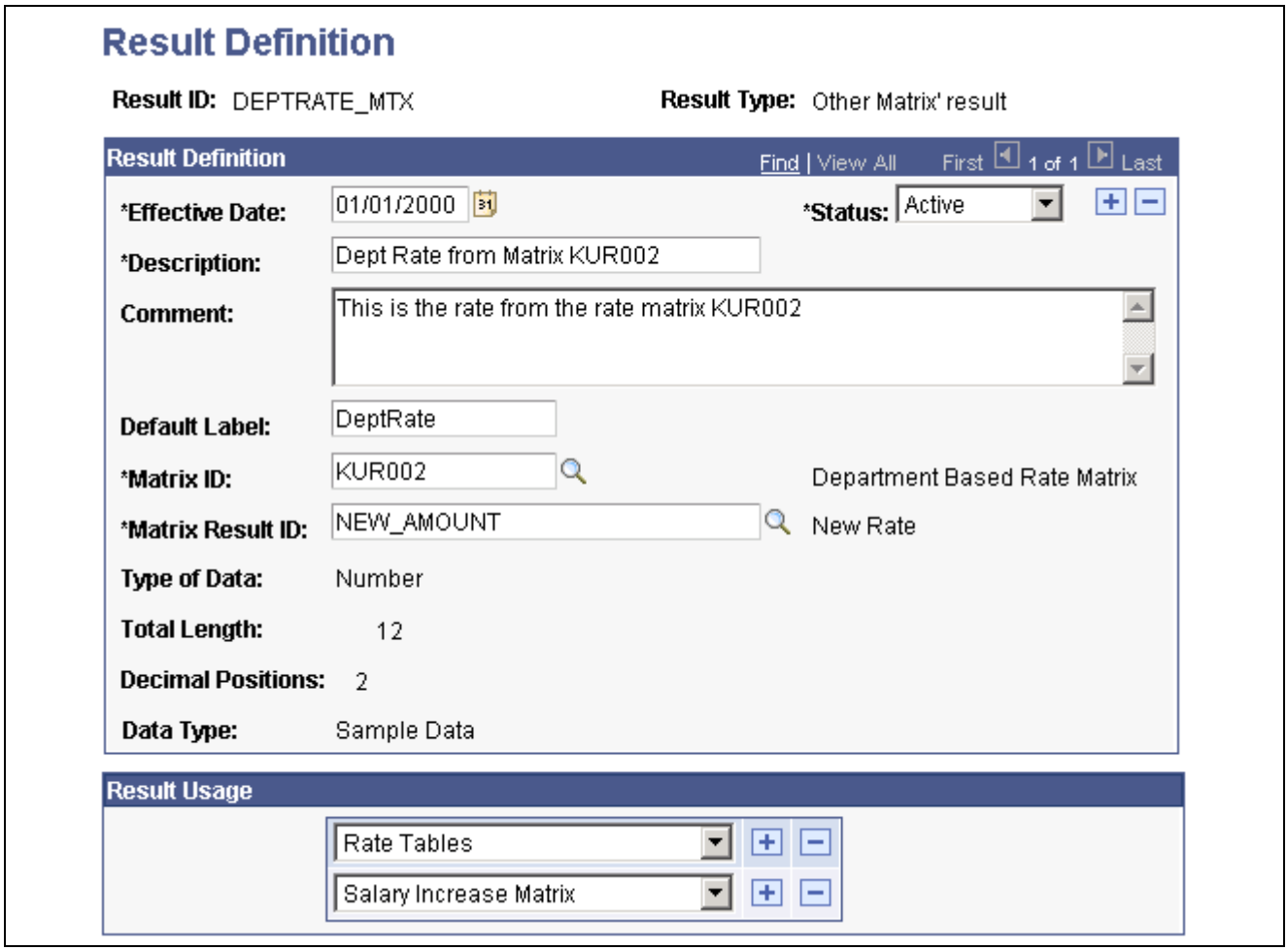
| Dept (Source) | ANNUAL_RATE_SOURCE (Result) | Bonus Percent (Result) |
|---|---|---|
| 101 | ANNUAL RATE | 4 |
| 102 | ANNUAL RATE | 4 |
| 103 | ANNUAL RATE | 5 |
| 104 | ANNUAL RATE | 6 |

Since you do not know the worker's annual rates, you define one result ID of type of SOURCE, called ANNUAL_RATE_SOURCE and associate it to the Source ID "ANNUAL_RATE". You then define a second result ID of type PCNTOFBASE, called BONUS_PCT which tracks the bonus percentages. You specify the ANNUAL_RATE_SOURCE Result ID as the target result ID to which the bonus percentage will be applied. Now when this matrix is evaluated, the following actions will occur:

1. Since department is the required input, system looks up the worker's department (let's say it is 103).
2. System looks up results for Dept 103.
3. For the result Annual_Rate_Source system looks up the ANNUAL RATE of the worker and returns that value (let's say it is 10,000 USD)
4. For the result Bonus Pct, the system applies the 5 % to 10,000 USD and returns a value of 500 USD.

## Defining Results Based on the MATRIX Result Type

Access the Result Definition page and select *MATRIX* as a Result Type.




Result Definition page - Matrix result type

**Matrix ID** Select the matrix on which this result should be based.

**Matrix Result ID** Select a result ID (for the matrix) on which this result should be based.

This type of result uses one of the result IDs of another matrix as its value. When a matrix using this result is evaluated, the system will evaluate the referenced matrix to get the final value. For example, assume that you want to set up a payment structure for health benefits and you decide that the company will pay health benefits at 20% of the standard compensation rates by department. In order to determine a worker's health benefit rate, you need to determine their department's standard compensation rate. However the standard compensation rate itself is dynamically set based on Salary Grade Steps. Assume that the standard rate is derived using the KUR001 rate matrix which has NEW_AMOUNT as the result. Then the system would use the NEW_AMOUNT result of that matrix as the reference rate. Now the system can apply a percentage on that result (using PCNTOFBASE) to get a final health benefit rate.

Therefore in this case, the Matrix ID is KUR001, and the Matrix Result ID is NEW_AMOUNT.

# Defining and Maintaining Configurable Matrices

To define configurable matrices, use the Define Matrices (WCS_LK_TBL_DEFN) component.

This section discusses how to:

- Define matrices.
- Define inputs (source IDs).
- Define matrix output (result IDs) information.
- Specify search keys for configurable matrices
- Load values from the prompt table.
- Enter data content fields.
- View matrix results.

## Common Elements Used in this Section

**Description** Enter a description for the matrix.

**Status** Select *Active* or *Inactive*.

**Important!** Matrices must have a status of Active to be used in any business process.

**Comment** Add any relevant comments for this matrix.

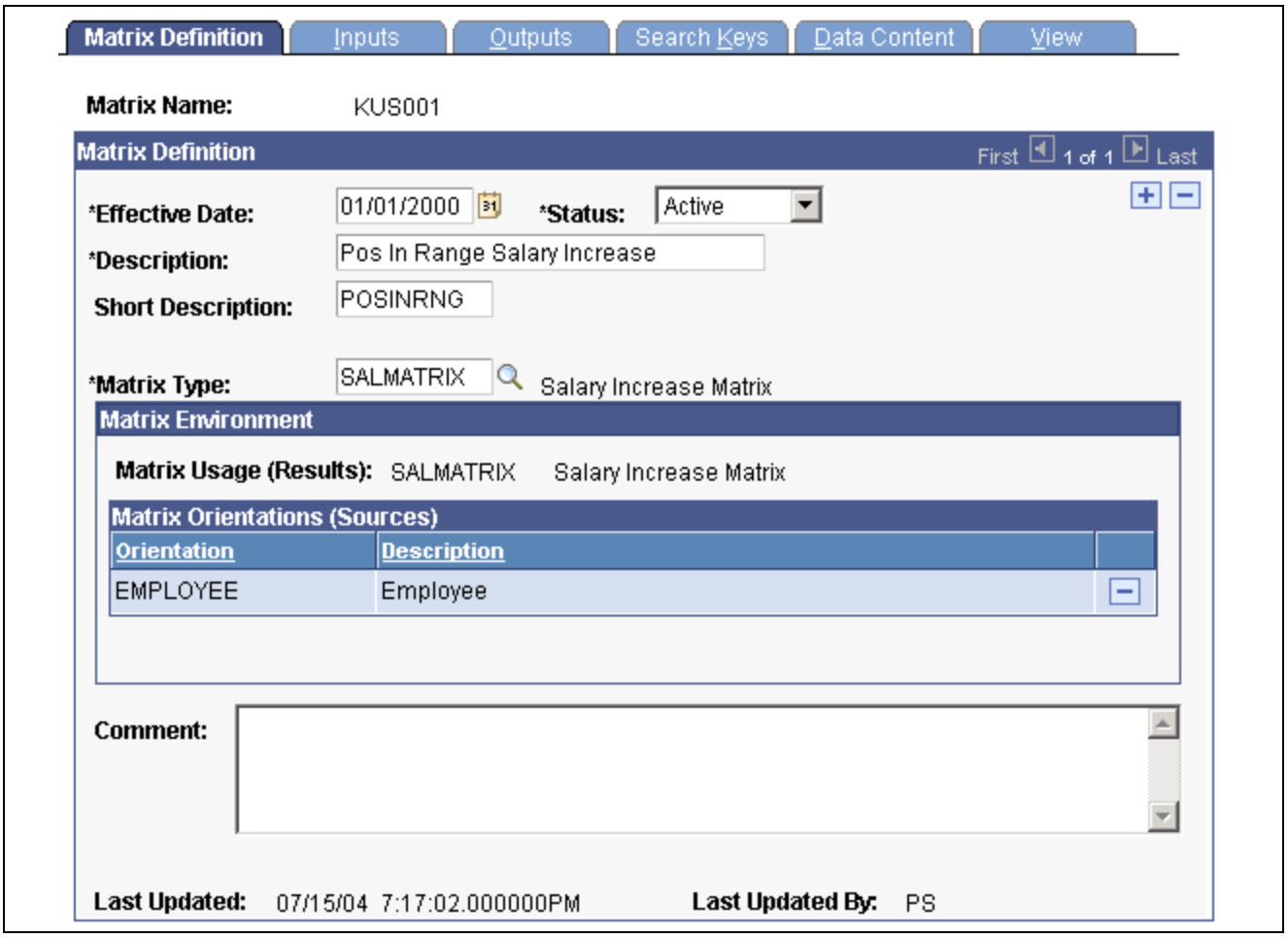
**Default Label** Enter the label.

# Pages Used to Define and Maintain Configurable Matrices

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Matrix Definition | WCS_LK_TBL_DEFN | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices | Define and maintain matrices. |
| Inputs | WCS_LK_TBL_INPUTS | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs | Define inputs to the configurable matrix. |
| Outputs | WCS_LK_TBL_OUTPUTS | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs | Define outputs of the matrix. |
| Search Keys | WCS_LK_TBL_KEYS | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys | Specify the search keys to be used to match worker data. |
| Load Configurable Matrix Keys | WCS_LK_TBL_KEY_SEC | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys<br>Click the Load Values from Prompt link. | Automatically load search keys for specific sources using a prompt table. |
| Data Content | WCS_LK_TBL_DATA | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content | Enter values for the output data. |
| View | WCS_LK_TBL_VIEW | Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View | View the matrix as of the *last* saved version. |

## Defining Matrices

Access the Matrix Definition page.




Matrix Definition page

**Note.** All matrices are created with a state of *Inactive.* You must change the status to *Active* in order to use them.

**Matrix Type**

Select the matrix type on which the configurable matrix should be based. Values are:

- *MARKETPAY* (market pay surveys)
- *RATE* (rate tables)
- *SALMATRIX* (salary increase matrices)

**Orientation**

The orientation indicates the starting point for associating the employee ID to other related fields. If all sources used in the matrix can be evaluated using EMPLOYEE and JOB records only, then you only need the EMPLOYEE orientation. If there are sources that can be evaluated starting from worker's Position information, then you can add POSITION as another orientation.

**Note.** You must have at least one orientation. You are allowed to have both orientations.

If the information available to the calling program is only position data and not the employee ID, then you need POSITION as an orientation to allow the matrix to evaluate the sources.

### See Also

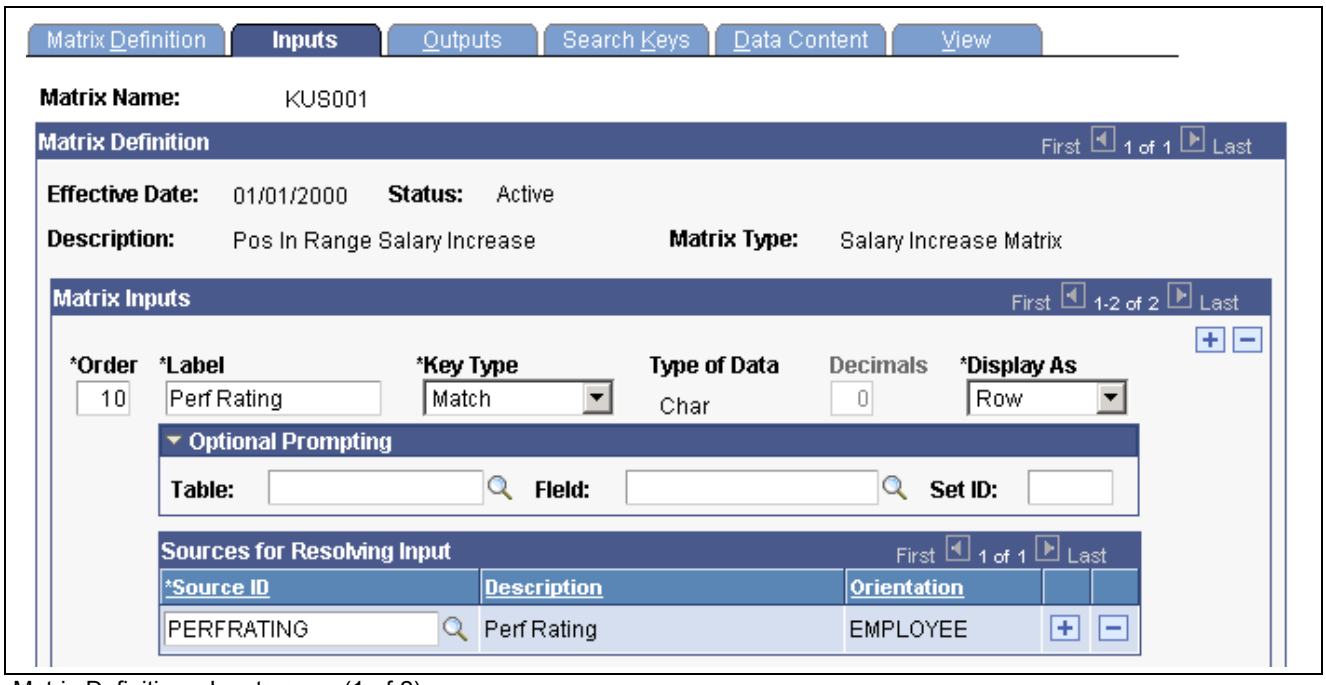
*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Market Pay"

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Setting Up Administer Compensation," Setting Up Rate Codes

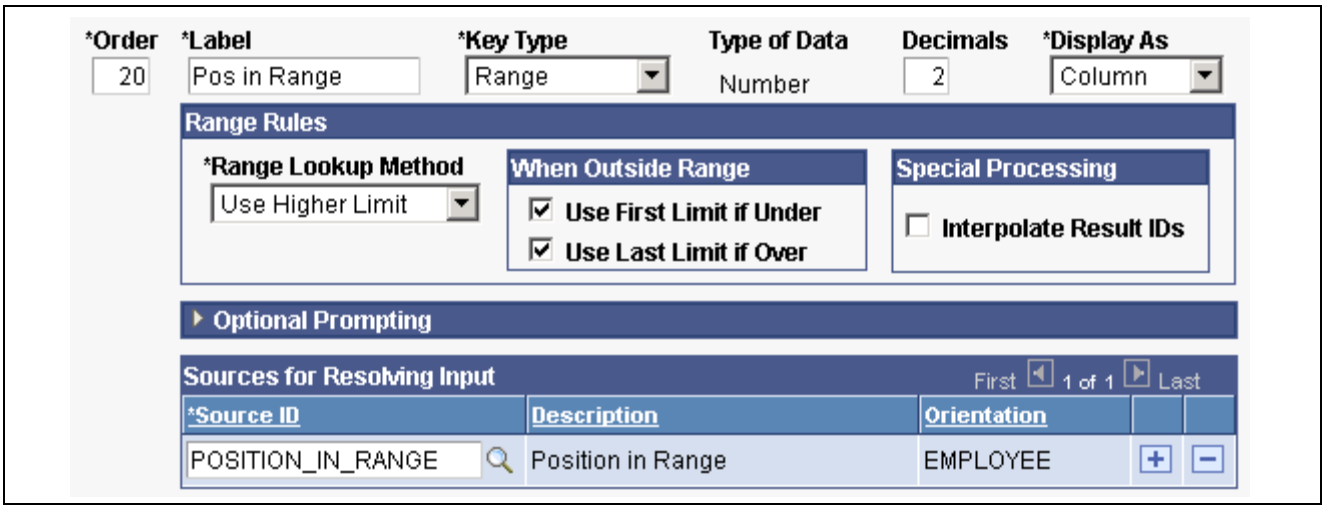
Chapter 7, "Budgeting and Planning Salary Increases," page 109

## Defining Inputs for Matrices

Access the Inputs page.




Matrix Definition - Inputs page (1 of 2)




Matrix Definition - Inputs page (2 of 2)

## Matrix Inputs

**Order** Enter the numerical value to indicate the order in which the inputs should appear in the configurable matrix. This will also determine the order in which the inputs are evaluated against the worker data.

**Label** Enter the label that will be displayed.

**Key Type** Select a value:

- *Match*: The system will check for an exact match, if available.
- *Range*: The system will check against a range of values, if available.

**Decimal** Enter the number of decimal positions to maintain for numeric inputs. This field will be grayed out as applicable.

**Display As** Select whether this input should display as a *Row* or a *Column* header.

**Important!** Only *one* input can be selected as a Column header. However, you can choose to have all inputs displayed as rows.

## Optional Prompting

If you want the ability to enter search keys from a prompt table, you can use this section to specify the Table, Field, and SetID.

**Note.** The system does not enforce that search keys must exist in that table. You are allowed to enter search keys that are new and do not exist in any table.

## Sources for Resolving Input

**Source ID** Select one or more sources that can be used to derive the matrix inputs. For example, if you are defining an input for JOBCODE, you should select the JOBCODE source ID. Every input is defined using at least one source, therefore you must select at least one source.

**Note.** You can leave the label for the input blank, and upon selecting the source, the system will populate the label field with the default label for that source.

## Range Rules

**Range Lookup Method** Select the method that dictates which breakpoint (range) the system should consider as a match. Values are:

- *Use Higher Limit*: The system retrieves the matrix data for the breakpoint higher than the input value.
- *Use Lower Limit*: The system retrieves the matrix data for the breakpoint lower than the input value.
- *Use Nearest Limit*: The system retrieves the matrix data for the breakpoint closest to the input value.

The following example illustrates how ranges work. Assume we have Percent-In-Range as the input. The typical ranges are 0–40%, 41–60%, 61–80% and 81–100%. For this example, we will only use the last 3 ranges (40–100). When defining these ranges in a configurable matrix, we would only enter the range breakpoints, which in this example are 40, 60, 80 and 100. The system interprets these breakpoints as defining the following ranges:

| Range Breakpoints | Range Breakpoints are equal to |
|---|---|
| 40 | All values below 40, up to and including 40. |
| 60 | All values greater than 40, up to and including 60. |
| 80 | All values greater than 60, up to and including 80. |
| 100 | All values greater than 80, up to and including 100. |

Analyzing the Lookup Methods

Assume a worker had a value of 45 percent.

- If the method is Use Higher Limit, the system determines that 60 is the first breakpoint higher than 45, and will use “60”.
- If the method is Use Lower Limit, the system determines that 40 is the first breakpoint lower than 45 and will use “40”.
- If the method is Use Nearest Limit, the system determines that 45 is closest to 40 and will use “40”. (If the worker’s percent-in-range had been 55, it would have used “60”.)

## When Outside Range

**Use First Limit if Under** Use this option if you want the system to consider the first breakpoint a match for all values lower than the first breakpoint. For example, if the worker had percent-in-range of 20%, it would use “40” if this check box was selected. If the box is cleared, the system will find “no match” for that input.

**Use Last Limit if Over** Use this option if you want the system to consider the last breakpoint a match for all values higher than the last breakpoint. For example, if the worker had percent–in–range of 120%, the system would use “100” if this check box was selected. If the box is cleared, the system will find “no match” for that input.

## Special Processing

**Interpolate Result IDs** Use this option if you want the system to calculate and return a numerical value that is proportional to the values tied to specific breakpoints.

## Interpolate Result IDs — Example

For this example, let’s assume that we have a matrix with the same percent-in-range breakpoints and one output that is a rate.

---

**Note.** All values are percentages, unless noted otherwise.

---

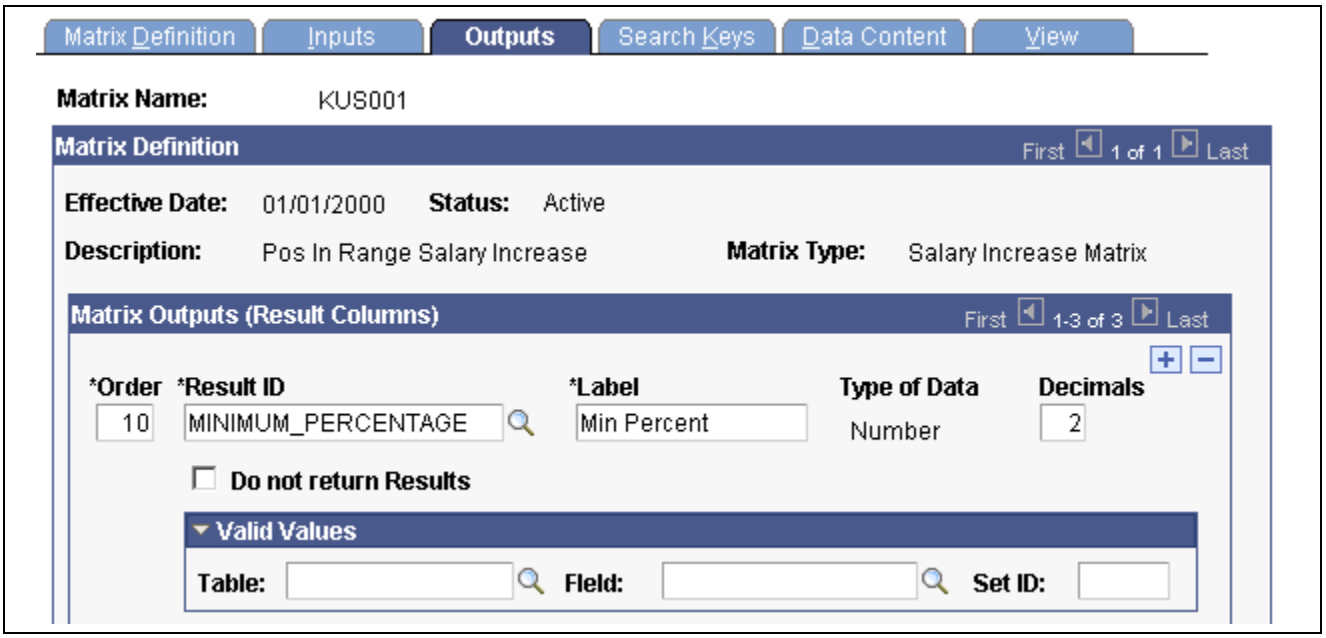
| Step | 40 | 60 | 80 | 100 |
|---|---|---|---|---|
| 1 | 40 | 30 | 20 | 10 |
| 2 | 50 | 40 | 30 | 20 |
| 3 | 60 | 50 | 40 | 30 |
| 4 | 70 | 60 | 50 | 40 |

Now suppose that the worker was on Step 1 and the Percent-in-Range (PIR) was 50. That means the rate could be 40 or 30. However if the Interpolate Result IDs option was set, the system would calculate the ratio of worker's value (50) to the lower limit (40) and use that ratio on the lower rate (40) and return a rate of 35. The worker's PIR of 50 is exactly between the breakpoints 40 and 60, and so the system calculates a rate exactly between the rates of 40 and 30.

If the PIR was 55 (75 percent of the numerical difference between 40 and 60), the system would return 32.50 as the 75 percent rate value between 40 and 60.

# Defining Matrix Output Information

Access the Outputs page.




Matrix Definition - Outputs page

**Note.** Available results on this page will differ depending upon the matrix type.

## Matrix Outputs (Result Columns)

**Order** Enter a numerical value that indicates the order in which the outputs should appear in the matrix.

***Result ID** Select a value that the configurable matrix should return as an output. These values come from the Results ID table.

***Label** Enter the label that will be displayed in the matrix.

**Type of Data** This display-only field indicates if the Result ID has a character, number or date format.

**Decimals** If the result ID has a number format, then you can enter the number of decimal places that you want displayed on the matrix.

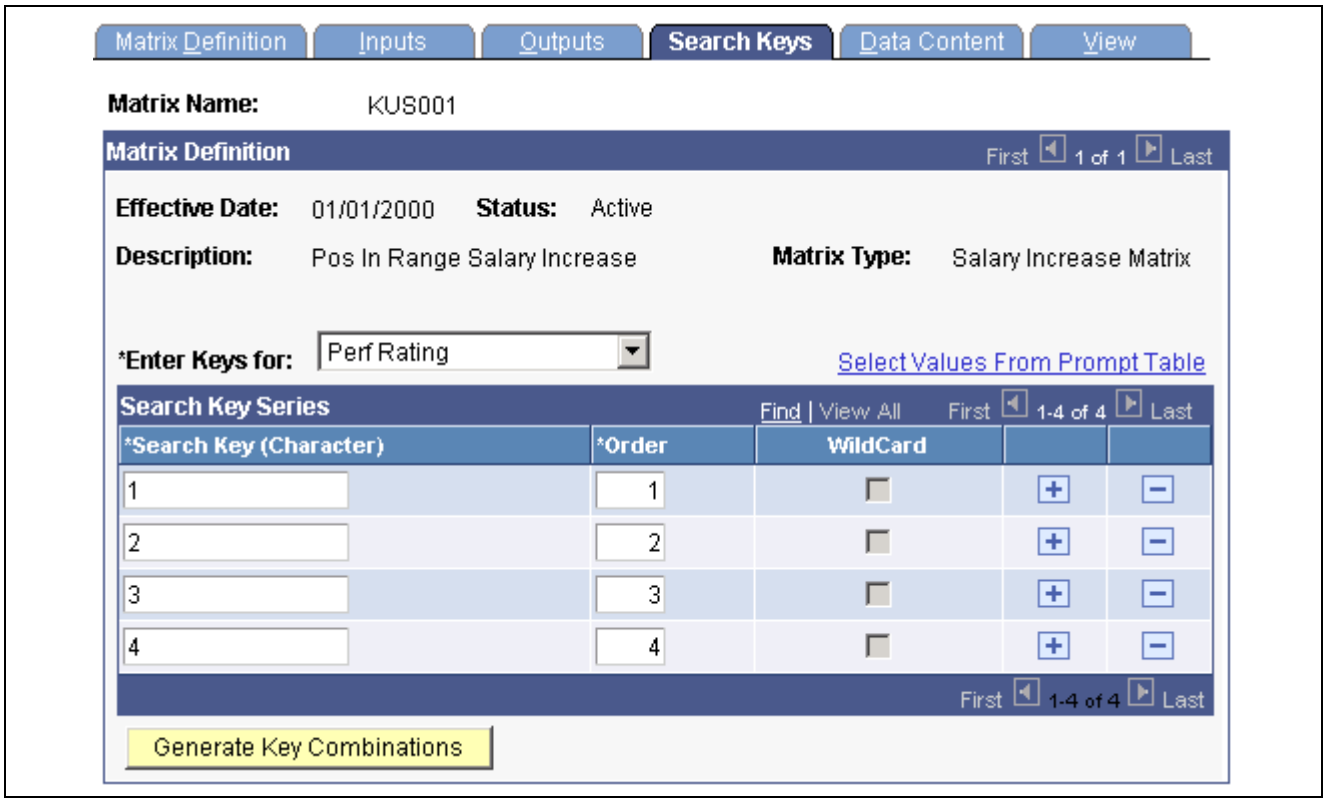
**Do not return Results** Select this check box if the result is to be used as a reference only for a calculation in another result. For example, if you have a PCNTOFBASE type result which uses BASERATE as its reference, you can set this check

box on the BASERATE result ID. This means that the calling program will only receive PCNTOFBASE as an output result ID. It will not receive any other output from the matrix.

**Note.** You will see all defined result IDs on matrix displays, even though this check box may be selected for some results.

## Defining Search Keys for Configurable Matrices

Access the Search Keys page.




Search Keys page

Use this page to enter the key values against which worker data is matched. In the previous example, the system will check for worker's performance ratings to be 1, 2, 3, or 4.

**Note.** For market pay matrices, you are allowed to create the matrix without specifying any search keys and output data values. This is useful when you intend to load data into the matrix from a flat file. In this case you will define the matrix but not specify search keys and output data. You will still update the status to Active. Then you can load data into it from a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you will receive a warning.

For more options, review the sections regarding market pay matrices that explain how to load data into a matrix.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Market Pay".

## Matrix Definition

***Enter Keys for:** Select the input for which you will enter search keys. These values come from the Matrix Definition - Inputs page. You must enter at least one search key for each input (except for market pay matrices). In the previous example, after you have entered keys for performance ratings, you would switch to *Percent-In-Range* and enter keys for that input.

**Select Values From Prompt Table** If you defined the Table and Field in the Optional Prompting group box for the selected input, you can click this link to access a search page that lists the values from that table. This link is not available if the input has a key type of Range.

## Search Key Series

***Search Key (Character)** Enter a value. This will be the key values against which worker data is matched. For example, you would enter rows with key values 1, 2, 3, 4 for the input *Performance Rating.* You would enter key values 40, 60, 80 and 100 for the input *Percent-in-Range*.

**Order** Enter a numeric value that indicates the order in which the search keys will be displayed in the matrix. This field only applies to keys of type Character. Numeric and Date values have an implicit order and do not use this field for display order.

**WildCard** Select if the system should use the search key as a wildcard. This means that if the worker's data did not match any other key, then the system will use this row as a match. For example, assume that there are 4 departments listed in the matrix as keys 101, 102, 103, and 104. Now if you wanted all workers in all other departments to be handled separately, then enter a fifth key for Dept and make it a wildcard.

You can set a wildcard only if the key type was set to Match. Wildcards do not apply for key type of Range.

**Generate Key Combinations** After you have completed entering keys for all inputs, click this button to generate the key combinations for the configurable matrix. The system automatically takes you to the Data Content page where you can enter values for each result ID for different input combination.

Generating Key Combinations — Example

For example, if you had one input as *Dept* with values 101, 102, 103, and 104, and another input of *Job Risk* with values of High, Med, or Low, and a single output of Rate, then the system would generate the following table of combinations automatically.

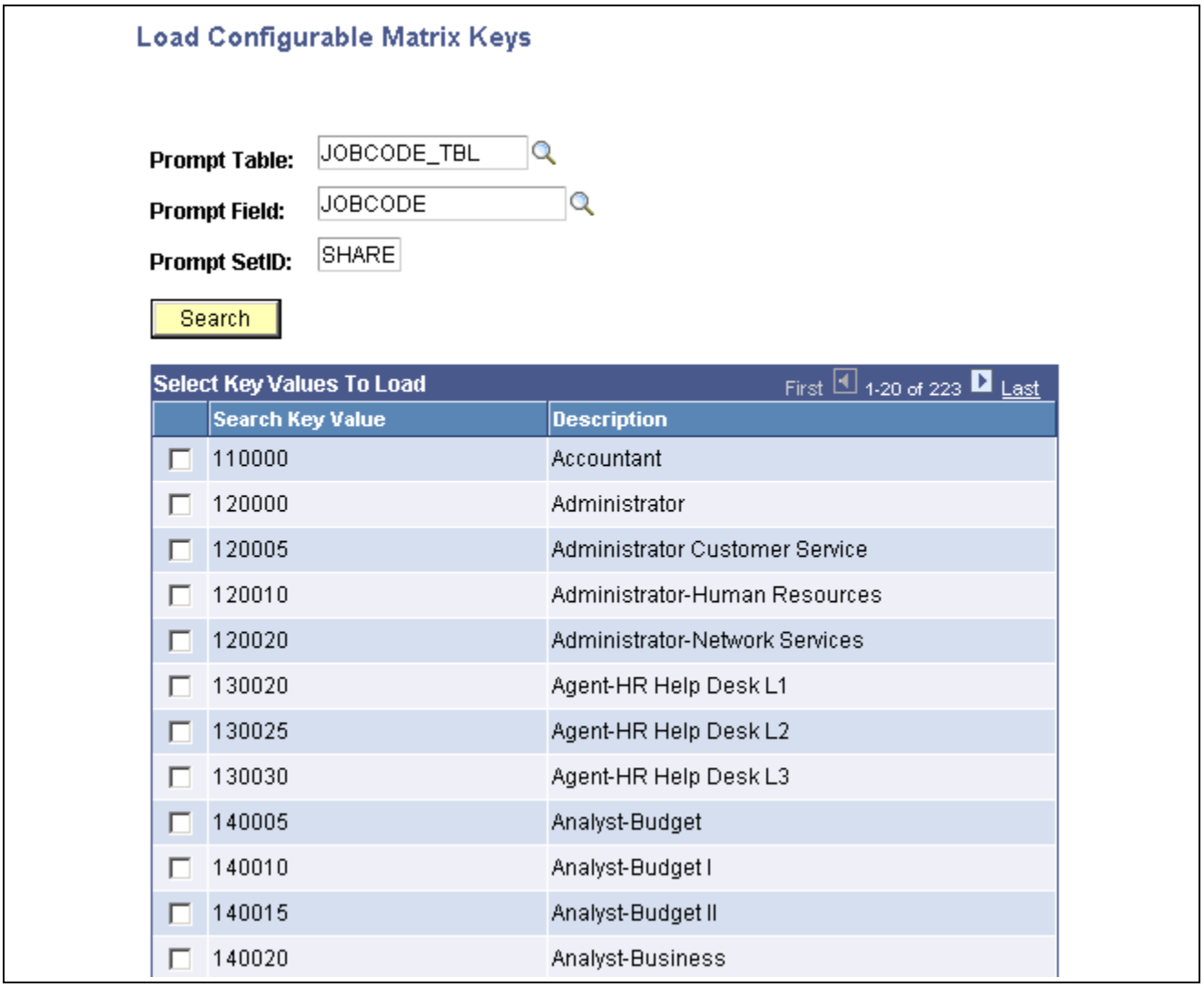
| Dept | Risk | Rate |
|---|---|---|
| 101 | Low | 0 |
| 101 | Med | 0 |
| 101 | High | 0 |
| 102 | Low | 0 |

| Dept | Risk | Rate |
|---|---|---|
| 102 | Med | 0 |
| 102 | High | 0 |
| 103 | Low | 0 |
| 103 | Med | 0 |
| 103 | High | 0 |
| 104 | Low | 0 |
| 104 | Med | 0 |
| 104 | High | 0 |

Now you can simply enter the rates and you do not need to manually enter Dept IDs or Risk levels.

## Loading Values from the Prompt Table

Access the Load Configurable Matrix Keys page.



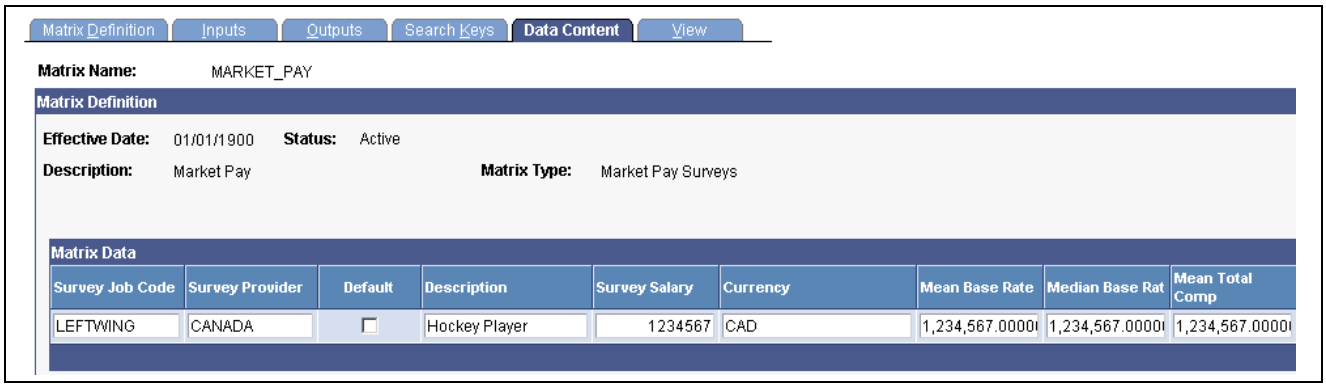

Load Configurable Matrix Keys page

To load values from a specific prompt table:

1. Select the Prompt Table.
2. Select the Prompt Field.
3. Click Search.
4. In the Select Key Values to Load grid, select the check boxes for the values you want to load.
5. Click OK.

## Entering Data Content Fields

Access the Data Content page.



Data Content page

This page lists the combinations of search keys for all inputs that the matrix will evaluate. For each combination, it lists all outputs fields. You can add the character, date, or numerical values of each output here.

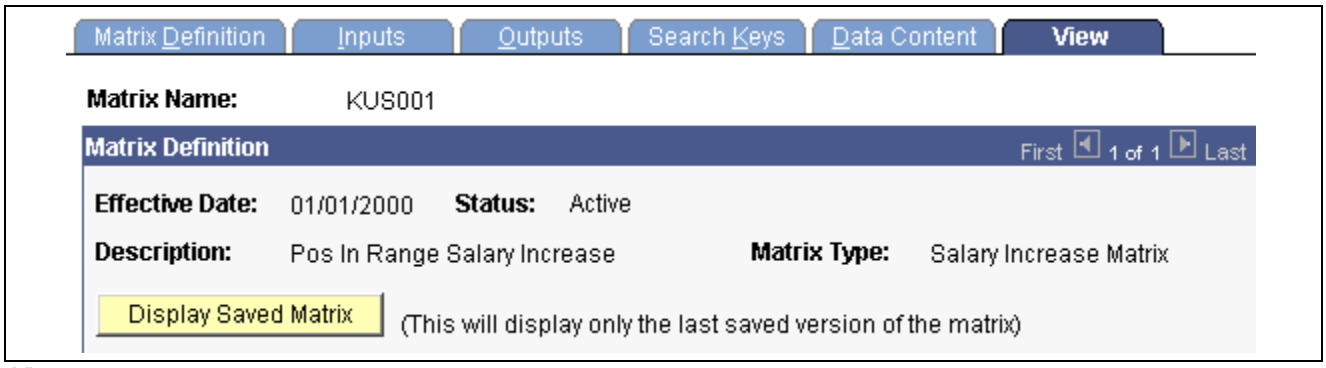
**Note.** All inputs appear to the left of the Default column and all outputs appear to the right of the Default column.

**Default** (Optional) Select the row that you want to use as default results if the system does not find a match between the worker data and any combination of input rows. In the previous example, you can choose a default should a worker be above or below the 40 and 100 ranges or who does not have any performance rating.

**Important!** You can only select one row as a Default.

# Viewing Matrix Results

Access the View page.



View page

After you have entered all data content for outputs, you must save the matrix. You can view the matrix on this page only *after* you have saved it.

When you click the Display Saved Matrix button, the results generated are from the *last saved* version of the matrix.

**Important!** This page will display only the *last saved* version of the matrix.

# Using Special Rules to Create Configurable Matrices

There are special rules to use when you create rate matrices and salary increase guidelines matrices. There are specific result ID values that must exist in each type of matrix in order for the system to be able to process the matrix. This is required because the components where these matrices are invoked will look for and process specific result IDs. If the correct result IDs do not exist, the calling component will not know how to process the output.

## Rate Matrix

This table lists the result IDs that *must* exist in a rate matrix which you plan to associate to a rate code. The list of expected result IDs is based on the Rate Code Type:

**Note.** You do not need every result ID for each type. You only need *one* of these result IDs.

| Rate Code Type | One of these Result IDs must exist |
|---|---|
| Flat Rate | • NEW_AMOUNT<br>• PERCENT_TO_APPLY |
| Hourly Rate + Flat Amount | • NEW_AMOUNT<br>• PERCENT_TO_APPLY |
| Hourly Rate | • NEW_AMOUNT<br>• PERCENT_TO_APPLY<br>• INCREMENT_AMOUNT<br>• THRESHOLD |
| Percent | INCREMENT_PERCENT |
| Points | NEW_POINTS |

If you create a rate matrix that uses calculations, such as result IDs with the type of PERCENT_TO_APPLY, INCREMENT_PERCENT, and so on, you *must* select the Do not return Results check box for all other result IDs. This is necessary because the system requires that a rate matrix attached to a rate code can have only one result ID returned.

## Salary Increase Matrix Attached to a Group Budget

The result IDs in the matrix must match the Rate Code Type. This table illustrates the result IDs that are allowed based on Rate Code Type:

| Rate Code Type | Allowed Combinations of Result IDs |
|---|---|
| Flat, Hourly, or Flat + Hourly | The matrix must have *one* of the following three combinations of result IDs:<br>• DEFAULT_PERCENTAGE<br>• MINIMUM_PERCENTAGE, DEFAULT_ PERCENTAGE, MAXIMUM_PERCENTAGE<br>• MINIMUM_PERCENTAGE, DEFAULT_ PERCENTAGE, MAXIMUM_PERCENTAGE, AMOUNT |
| Percent | The matrix must have *one* of the following two combinations of result IDs:<br>• DEFAULT_PERCENTAGE<br>• MINIMUM_PERCENTAGE, DEFAULT_ PERCENTAGE, MAXIMUM_PERCENTAGE |
| Points | The matrix must have *one* of the following two combinations of result IDs:<br>• DEFAULT_POINTS<br>• MINIMUM_POINTS, DEFAULT_POINTS, MAXIMUM_POINTS |

When the salary increase matrix is attached to a group budget, the system will always look for the DEFAULT_PERCENTAGE, DEFAULT_AMOUNT, or DEFAULT_POINTS result ID, and will use that result ID to calculate the budget or assign increases.

However, the system performs special processing when the matrix includes both DEFAULT_PERCENTAGE and AMOUNT result IDs. In this case, the AMOUNT result ID is treated like a *lump sum* increase amount. Since every row will have both a default percentage and an amount result, the system will first check to see if the value for AMOUNT is greater than 0. If the value is greater than 0, the system uses that value as a lump sum increase amount on the group budget. If the AMOUNT value is 0, then the system uses the value for DEFAULT_PERCENTAGE as a change percentage. This allows you to create a salary increase matrix which handles the cases where worker's compa-ratio or percent-in-range values are outside the standard guidelines.

This example illustrates a salary increase matrix that includes percent-in-range values that are outside the standard guidelines.

| Perf Rating | 0 | | | | 50 | | | | 100 | | | | 1000 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Min Pct | Dflt Pct | Max Pct | Lump Sum | Min Pct | Dflt Pct | Max Pct | Lump Sum | Min Pct | Dflt Pct | Max Pct | Lump Sum | Min Pct | Dflt Pct | Max Pct | Lump Sum |
| 1 | 0.00 | 0.00 | 0.00 | 20.00 | 6.00 | 6.50 | 7.00 | 0.00 | 5.00 | 5.50 | 7.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.00 |
| 2 | 0.00 | 0.00 | 0.00 | 18.00 | 5.00 | 5.50 | 6.00 | 0.00 | 4.00 | 5.00 | 6.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.00 |
| 3 | 0.00 | 0.00 | 0.00 | 16.00 | 4.50 | 5.00 | 5.50 | 0.00 | 4.50 | 4.50 | 5.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.00 |
| 4 | 0.00 | 0.00 | 0.00 | 6.00 | 3.00 | 3.50 | 4.00 | 0.00 | 3.00 | 3.50 | 4.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Note that the matrix includes an explicit breakpoint with Percent in Range (PIR) value of 0. This is required to handle all workers whose PIR is negative as compared to their salary range. Also there is a breakpoint with a value 1000. This is required to handle all workers whose PIR is greater than 100. The value 1000 is just an arbitrarily high value chosen to ensure we can capture all possible PIR values greater than 100.

Note how the LumpSum values are non-zero only for breakpoints 0 and 1000. All other breakpoints have LumpSum=0. This means that worker whose PIR is between 0 and 100 will get increases based on DEFAULT_PERCENTAGE guideline, while those whose PIR is outside the standard range (less than 0 or greater than 100) will get a flat amount increase based on the LumpSum AMOUNT guideline.

# Copying Matrices

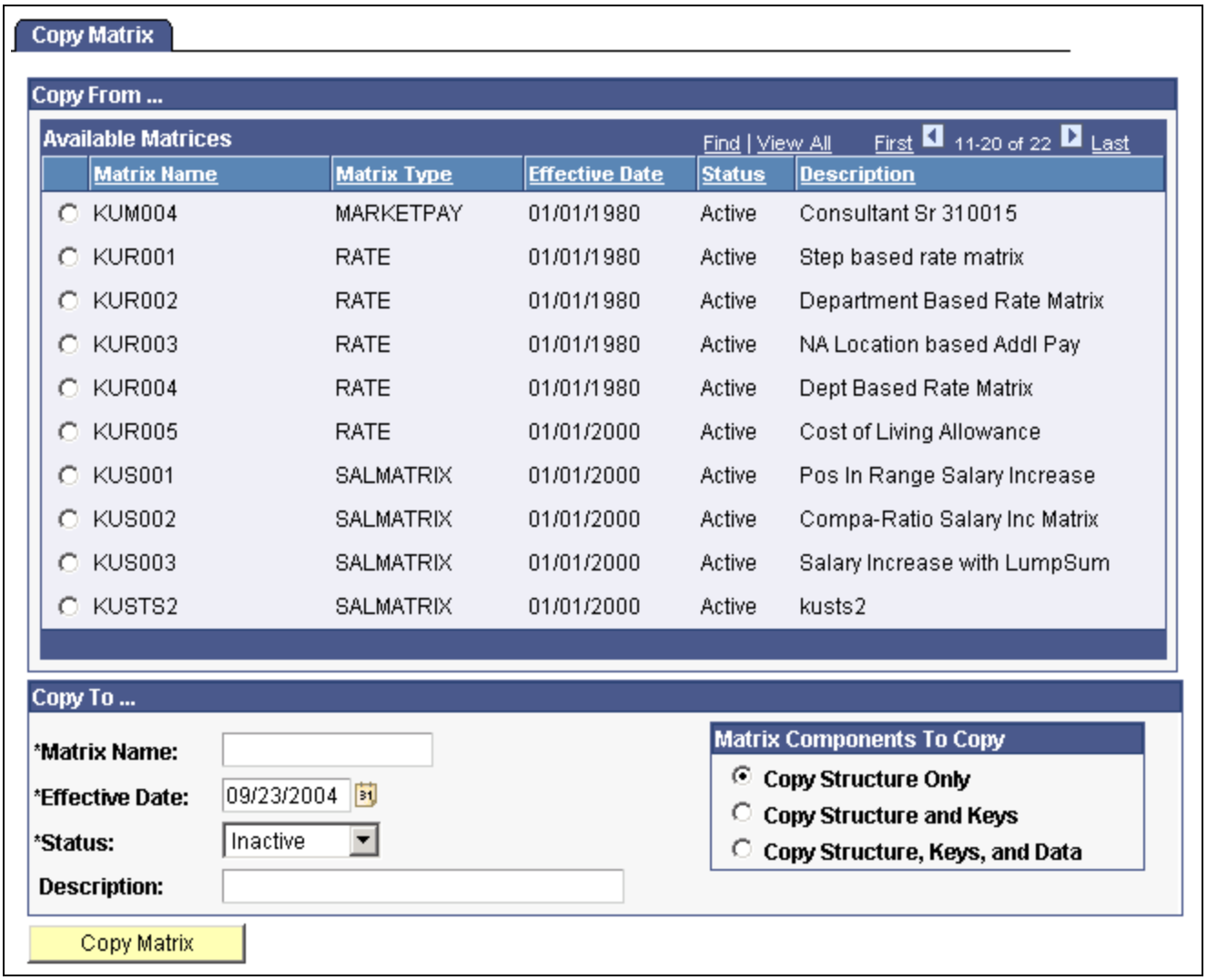
This section discusses how to create new matrices by copying existing matrices.

## Page Used to Copy Configurable Matrices

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Copy Matrix | WCS_LK_TBL_CLONE | Set Up HRMS, Common Definitions, Configurable Matrices, Copy Matrix | Copy matrices. |

## Copying Matrices

Access the Copy Matrix page.




Copy Matrix page

To copy a matrix:

1. Select the matrix that you want to copy from the Available Matrices.
2. In the Copy To... group box, enter a Matrix Name, Effective Date, and Description for the new matrix.
3. In the Matrix Components to Copy group box, select one of these values:
   - Copy Structure Only: This includes just matrix details, input and output definitions.
   - Copy Structure and Keys: This includes the structure plus all search key values for every input.
   - Copy Structure, Keys, and Data: This clones the entire matrix.
4. Click Copy Matrix and the system will create the copy.

   You will get a confirmation message and then see a new link “Edit New Matrix <<matrix name>>. You can click the link to begin editing the new matrix immediately.

# Building a Special Rate Matrix — Tutorial

This section provides the steps to take to build a special rate matrix using the PERCENT_TO_APPLY result ID and RELATED_EMPLOYEE_INFORMATION sources types.

For this tutorial, let us assume you want to set up a rate code of COLA01 to track the cost of living allowance (COLA) for all workers within a certain salary plan. However, you want the actual rate for each worker to be based on the worker's Step in the salary grade and the current minimum hourly rate for that grade. You do not want to create a rate code with fixed (static) rates. Since workers can be on different grades and different steps, you need the rate to be dynamically set at the time the rate code is defaulted onto the worker's compensation record.

## Understanding the High-Level Steps to Build this Special Rate Matrix

These are the high-level steps involved in this tutorial.

1. Define the source that will refer to the minimum hourly rate (by grade range) for the worker.
2. Define the result that will use that source.
3. Define the rate matrix using the percentage calculation.
4. Define the COLA01 rate code, and associate the rate matrix to it.

   This ensures that the rate will always be the default value based on worker's grade and step.
5. Update the salary plan definition and add the new rate code to the step components
6. Default pay components for appropriate workers.

## Background

The rules used in this example are:

- For workers on Step 1 : Rate = (worker's grade min ) * 2%.
- For workers on Step 2 : Rate = (worker's grade min ) * 3%.
- For workers on Step 3 : Rate = (worker's grade min ) * 4% .
- For workers on Step 4 : Rate = (worker's grade min ) * 5%.
- For all other workers, Rate = 0.

To achieve this rule set, the rate matrix will be as follows:

| Source 1 Step | Result 1: Grade Range Min | Result 2: Percent To Apply |
|---|---|---|
| 1 | EMPL_GRD_MINHRLY | 2 |
| 2 | EMPL_GRD_MINHRLY | 3 |
| 3 | EMPL_GRD_MINHRLY | 4 |
| 4 | EMPL_GRD_MINHRLY | 5 |
| * | EMPL_GRD_MINHRLY | 0 |

### Step 1: Create the Source for the Worker Grade Range Minimum (Hourly) Rate

Since we do not have an existing source that refers to a worker's grade range minimum hourly rate, we will create it.

1. Navigate to the Define Sources page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Sources), and click Add a New Value.
2. Enter *EMPL_GRD_MINHRLY* as the Source ID.
3. Select *EMPRELATED* as the Source Type ID.
4. Fill in all other required fields.
5. On the tree, open Job History, Salary Grade - Salary Grade Table, and then click Min_RT_Hourly (minimum pay rate hourly).
6. Click Save.

   Now we have the source.

### Step 2: Create the Result to Refer to the New Source

We already have the PERCENT_TO_APPLY result ID. However, this result can only work in conjunction with another result ID. We can only apply the percentages to another result ID, not to any source.

Therefore, we need to create a result ID that refers to the new source.

1. Navigate to the Define Results page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Results and click Add a New Value.
2. Enter *EMPL_GRD_MINHRLY* as the Result ID so we know this is referring to worker's grade range minimum.
3. Select *SOURCE* as the Result Type ID.
4. Click Add a New Value.
5. Fill in all other required fields.
6. On the Results Definition page, select *EMPL_GRD_MINHRLY* ( hourly rate of grade minimum) as the Source ID .
7. Select *Rate Tables* in the Results Usage group box.
8. Click Save.

   You now have the result.

### Step 3: Define the Rate Matrix

Now we are ready to create the rate matrix.

1. Navigate to the Define Matrices page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices), and click Add a New Value.
2. Enter the name *COLA001* (this is the Matrix name, not the rate code name, but in this example to make it easy, we will use a similar name).
3. Fill in all required fields on the Matrix Definition page.
4. Select the Inputs tab.

   Since we are using just the worker's salary grade step to differentiate the rates, we only need a single source and that is the Step. Select *STEP* as the single source ID in the Sources for Resolving Input group box.

5. Select the Outputs tab.

   Select *EMPL_GRD_MINHRLY* as the first Result ID. Enter label Empl Grd Min.

6. Click Add a Row icon (+) to add another row, and select *PERCENT_TO_APPLY*— this is the formula we want to use.

7. Enter *COLA* as the Label for that result.

8. Select *EMPL_GRD_MINHRLY* as the operand for the formula (Uses Result)

9. Go to the Search Keys page.

   Enter the Search Key (Number); these are the actual step numbers. In this example, we entered values of 1,2,3,4 and * as the wildcard.

   **Note.** In this example, we are using a wildcard as the last row. So workers who are not on any step will be handled with that entry.

10. Click the Generate Key Combinations button.

11. The system has automatically taken you to the Data Content page.

    Enter the percentages you want to apply for each step.

12. Click the Matrix Definition page and change the Status to *Active*.

13. Click Save.

    The matrix is now ready for use.

### Step 4: Create the COLA01 Rate Code

You now need to create the rate code for this example.

1. Navigate to the Define Comp Rate Code Table page (Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table), and click Add a New Value.

2. Enter *COLA01* as the name for this rate code.

3. Enter or select these values for these fields in the Compensation Rate Code Information group box:

   - Effective Date: Enter the effective date for this rate code.
   - Status: Select *Active*.
   - Description: Enter *COLA Rate Code*.
   - Base Pay: Select this check box.
   - Rate Code Type: Select *Hourly Rate*.
   - Rate Code Class: Select *BASSAL* (elements of base salary).
   - Calculated By: Select *Rate Matrix*.
   - Rate Matrix Name: Select *COLA001*.
   - Currency: For this example, select *USD*.
   - Frequency: Select *H* (hourly).

4. Click Save.

### Step 5: Update Salary Plan Definition

You are now ready to add the new COLA01 compensation rate code to the salary step components.

1. Navigate to the Define Salary Grades component (Compensation, Base Compensation, Maintain Plans, Define Salary Grades), and search for the salary compensation plan to which you want to associate the new rate code.
2. Click the Salary Step Components tab.

   Click the Add a Row icon (+) and add the COLA01 rate code to Step 1 of this salary step.
3. Click the Next Row icon to navigate to next Step and add the COLA01 rate code for each additional step.
4. Click Save.

### Step 6: Set the Default Pay Component for One Worker in One Step

In this example, we are using the worker Simon Glenn, who is on step 3 of grade 1. We will set the default pay components for him so that the new rate code is added to his compensation record.

First, let's review the salary ranges for the grade:

| Frequency | Minimum | Midpoint | Maximum |
|---|---|---|---|
| Annual | 24,960.00 | 33,280.00 | 41,600.00 |
| Monthly | 2,080.00 | 2,773.34 | 3,466.67 |
| Daily | 96.00 | 128.00 | 160.00 |
| Hourly | 12.00 | 16.00 | 20.00 |

Simon's current compensation record is as follows:

Starting Annual Salary: 37,440.00

1. Add an effective dated row of 07/01/2003.
2. Add the *COLA01* rate code to this row.
3. Click the Default Pay Components button, the system enters a rate of 0.48 USD as the hourly COLA rate.

| Effective Date | Frequency | Rate Code to be Applied | Compensation Rate (for rate code) |
|---|---|---|---|
| 01/01/2003 | Annual | NAHRLY | 18.000000 |
| 07/01/2003 | Hourly | COLA01 | 0.800000 |

Since Simon is on step 3, using our matrix, that rate was based on 4% of the minimum hourly rate on his grade. Testing this scenario against the rate table, we would get a rate of (0.12 USD * 4% ) = 0.48 USD as the hourly rate amount returned by the matrix.

All new workers who get this rate code will now get the appropriate COLA pay.

# CHAPTER 6

# Reviewing Worker Performance History

This chapter discusses how to:

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

## Common Elements Used in This Chapter

**Rating Model** — A set of codes representing the levels of performance that you assign when evaluating worker 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 workers.

**Rating Scale** — Also known as Review Rating Scale. It provides a means of quantifying the overall results of a worker's review. The rating scale combines a list of competencies with a rating model and a method of calculating the worker'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 a worker'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.

## Viewing Worker Review Information

To view worker review information, use the Review History (EMPLOYEE_REVIEW_1) component.

This section discusses how to:

- Access worker reviews.

- Access reviewers comments.
- Review worker goals.

**Note.** Worker reviews are conducted in the Employee Review business process.

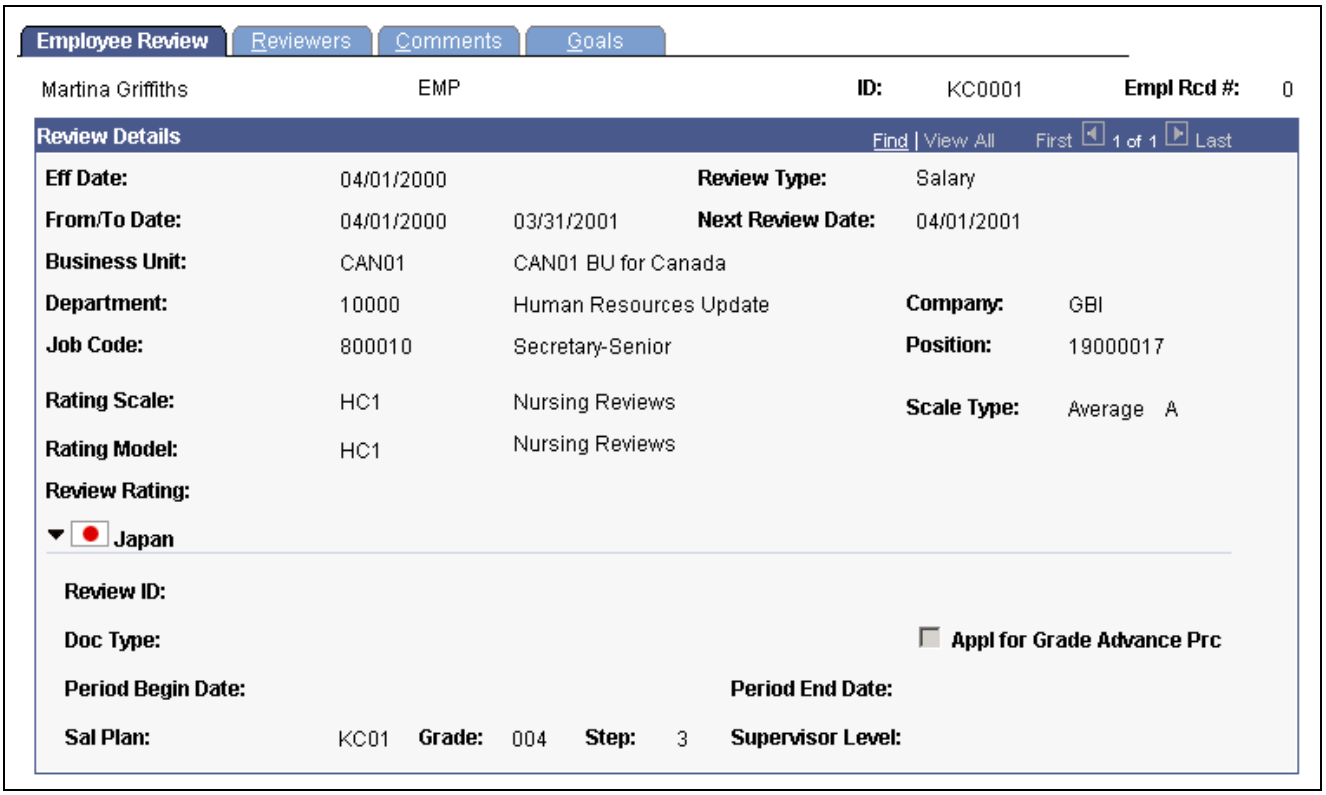
Use the Employee Review pages to review detailed, historical information on salary reviews, performance reviews, or both.

## Pages Used to Access Worker Reviews

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Employee Review | EMPLOYEE_REVIEW_1 | Compensation, Base Compensation, Employee Review History, Review History | View worker reviews. |
| Reviewers | EMPLOYEE_REVIEW_2 | Compensation, Base Compensation, Employee Review History, Review History | Review the list of competencies included in the rating scale and appropriate review fields. |
| Reviewer Comments | 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, Base Compensation, 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, Base Compensation, Employee Review History, Review History | Review worker goals and objectives. |

## Accessing Worker Reviews

Access the Employee Review page.



Employee Review page

## Review Details

**Review Type** Displays one of these values:

- *Both* (both a Salary and a Performance review)
- *Empl Fdbc* (employee feedback)
- *Initl Rtng* (initial rating)
- *Intrm Rtng* (interim rating)
- *Offcl Rtng* (official rating)
- *Performance*
- *Salary*
- *Self Assmt* (self assessment)

**Total Review Points** The system displays the total review points from the Reviewers page if the rating scale type is Summation.

**Total Review Amount, Total Review Percent, or Total Review Salary Points** Depending on the resolution of 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.

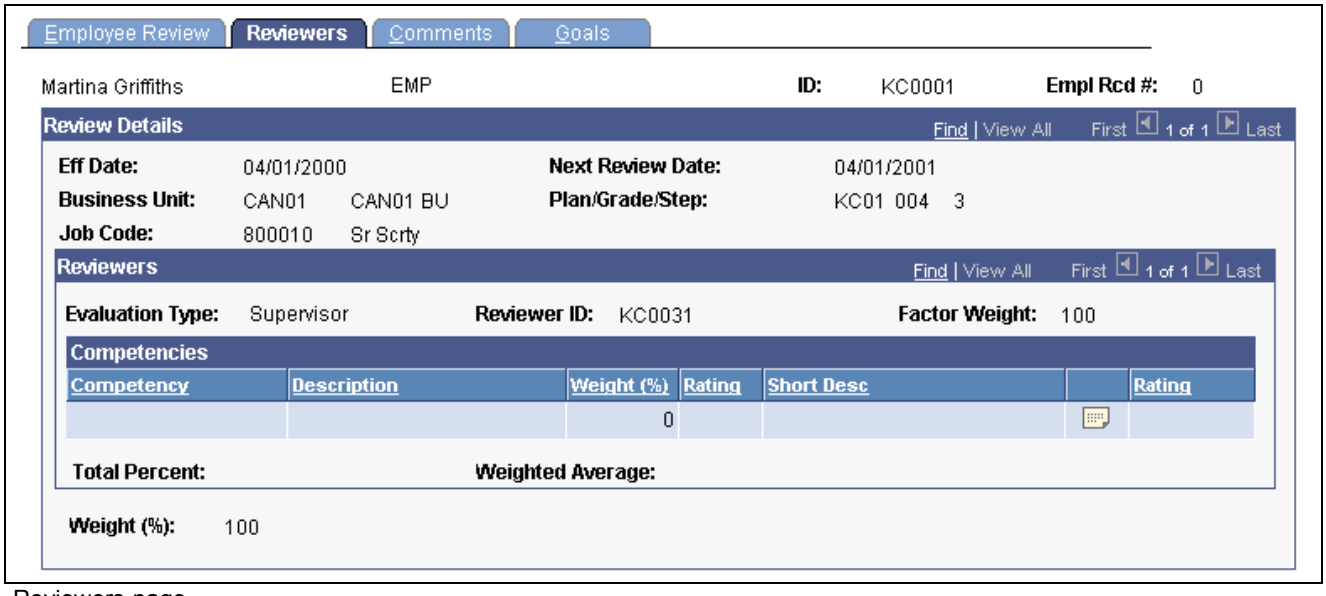
### Viewing Fields on the Employee Review Page

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 |
| NA | Total Review Amount | Final Review Band |
| NA | Total Review Salary Points | Status |
| NA | Total Review Percent | Loaded to Job |
| NA | Status | NA |
| NA | Loaded to Job | NA |

## Accessing Reviewers Comments

Access the Reviewers page.




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 worker'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 |
| Total Percent | Total Review Points | Total Review Points |
| Weighted Average | | |

## Competencies Field Definitions

**Competency** Displays the competencies that you defined for the rating scale on the Rating Scale Table.

**Description** Displays the short description of the competency.

**Weight (%)** (For Average scale only.)

The system displays the weight percent. The total of weight percents equals 100 percent for the worker.

**Rating** Displays the review rating that you want to give the worker for this competency.

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

Displays the points for this competency.

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

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

The system enters the total of the competency weights.

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

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

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

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

### Review Totals

**Weight (%)** Displays the total percent of reviews completed. For example, if reviewer 1 has 50 percent weight and reviewers 2 and 3 each have 25 percent weight, this field will show 75 percent after reviewers 1 and 2 have completed their reviews.

**Total Review Points** (For Summation and Review Band scales.)

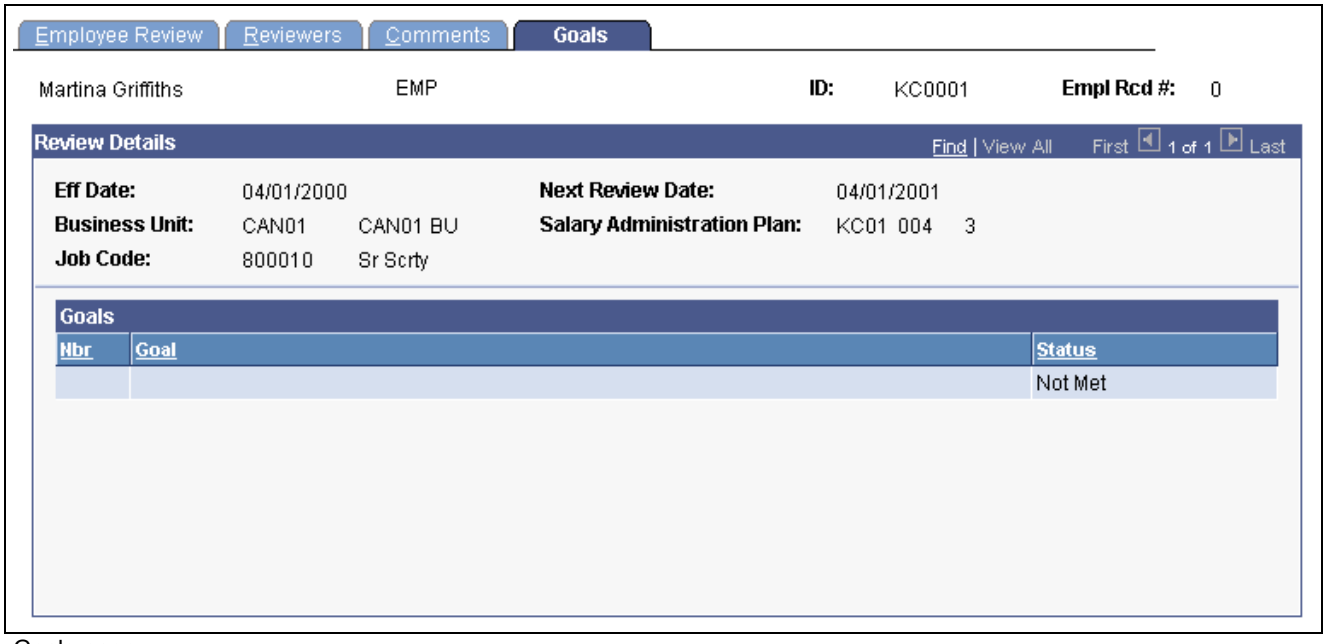
Displays the total review points for the reviews completed up to this point.

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

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

## Reviewing Employee Goals

Access the Review History - Goals page.




Goals page

### Goals

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

**Goal** The system displays goals from the worker's career plan.

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

### See Also

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Plan Careers and Successions*, “Planning Careers,” Creating Career Plans

# Reporting on Worker Reviews

To generate the worker review report, use the Review Audit (RUN_PER008) component.

This section discusses how to run the worker review report.

## Page Used to Run the Employee Review Audit Report

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Employee Review Audit | RUNCTL_PER008 | Compensation, Base Compensation, Employee Review History, Review Audit | Run the Employee Review Audit report (PER008). This report lists the worker review data that appears in the Employee Review component. |

# CHAPTER 7

# Budgeting and Planning Salary Increases

This chapter provides an overview of the Base Compensation budgeting and planning business process and discusses how to:

- Calculate base compensation budgets.
- View budget comparisons.
- Plan group increases.
- Load changes to compensation records.
- (MEX) Define the increase matrix method.

## Understanding the Base Compensation Budgeting and Planning Business Process

The following list outlines briefly the steps in the base compensation budgeting and planning process. You can calculate budget values with or without using the request budget functionality.

To calculate base compensation budgets

1. Create a group using group build pages or through Population Management.

   See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Groups".

   See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Using Population Management".
2. Set up base compensation and budgeting control tables.
3. Create a budget in the Create/Approve Budget component and select the budget type or action reason.
4. Load rate codes and select one of these methods for calculation:
   - Matrix
   - Amount
   - Percent
   - Points
   - Percent of Points
   - Add Percent
5. Calculate the new budget and view the results.

6. (Optional) Compare proposed budgets and make adjustments.
7. (Optional) Request approval from approving manager via workflow.
8. Approve a budget or go directly to the Assign Group Increases component without approving the budget first.
9. Establish a salary increase plan for workers in the group based on the budget.
10. Manually adjust increases of individual workers in the group.
11. Compare salary plan figures with budget figures.
12. Finalize and approve the salary increase plan.
13. Populate worker records with planned, approved increase.

### See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Establishing Group Default Control Values for Base Compensation Budgets and Plans, page 34

## Common Elements Used in This Chapter

| | |
|---|---|
| **Salary Increase Budget** | A budget for increasing base compensation rates for specified pay components. The budget is defined by worker group and calculates increases equally for all group members who have the budgeted rate codes in their compensation packages. |
| **Salary Increase Plan** | A plan for manually increasing the salaries of individual workers in a group. |
| **Requested Budget** | The base salary increase budget as it is defined and submitted for approval on the Group Increases pages. |
| **Current Budget** | The system uses the current salary increase budget for variance calculations in Group Budgets. |

# Calculating Base Compensation Budgets

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 Base Compensation Budgeting Procedures

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

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

  You want to use the batch process if your group is larger than 25 workers.

- 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 Create/Approve Group 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 one of these methods:
   - Use the group build pages.

     See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Groups".

   - Use population management.

     See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Using Population Management".
2. Set up salary plan control values for the group.
3. Assign a budget ID and describe the budget on the Create/Approve Group 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 Create/Approve Group Budget − Budget Requested page.

   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. Load rate codes to view all the rate codes for the group on Budgets Component page.
6. Enter salary increases by selecting a matrix, or entering an amount, a percent, etc. for each rate code as needed on the Create/Approve Group Budget - Budget Components page. You must save the page if you want to run the next step of calculations.
7. Calculate the requested and current budget amounts by clicking the Calculate button on either the Create/Approve Group Budget - Budget Components page or the Create/Approve Group 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 Create/Approve Group Budget - Budget Requested page.
8. If you are not using the requested budget functionality, do not click the Request Approval button.

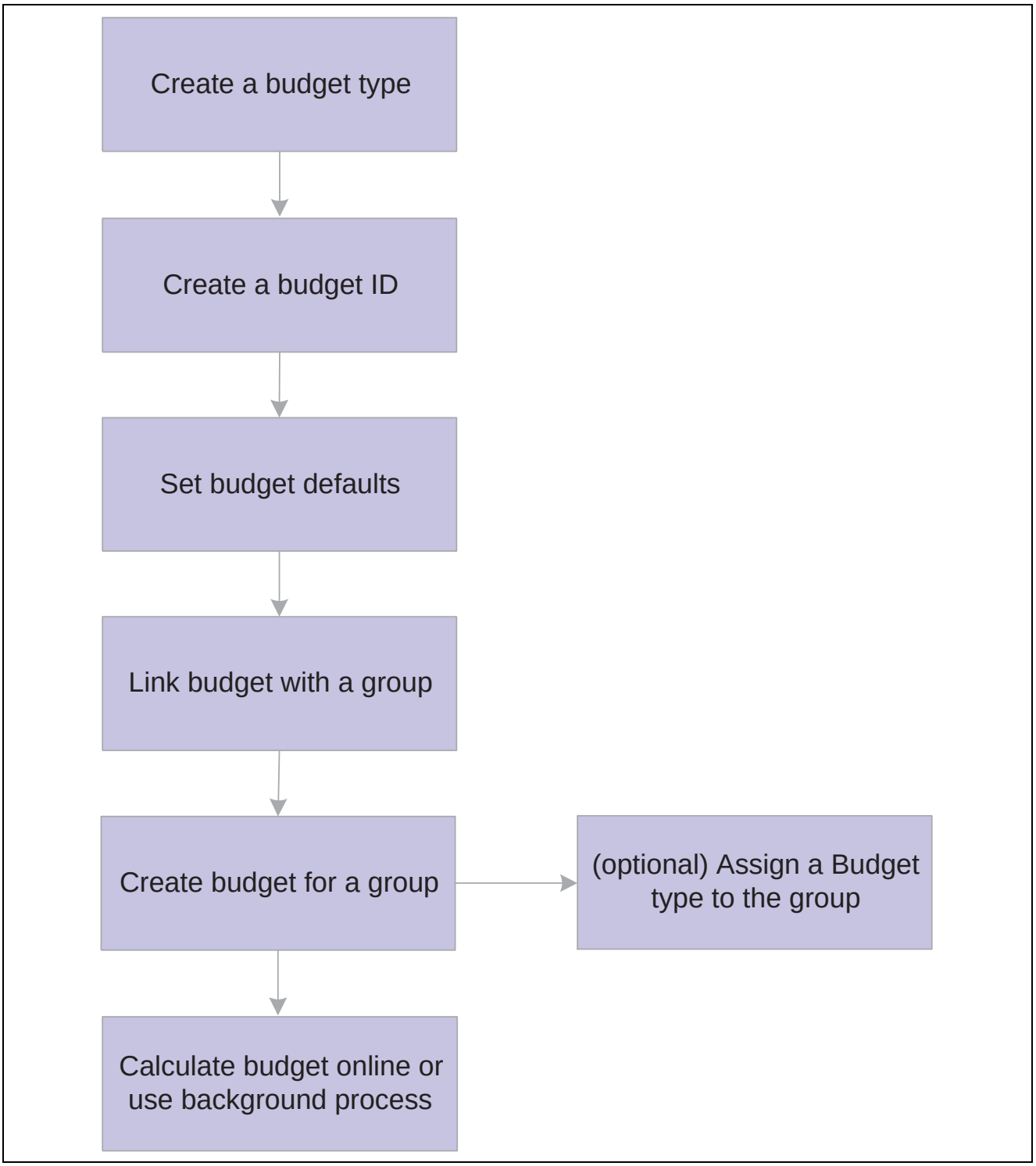
   . Optional: Access the More Budget Details page and select the check boxes for Total Current Annual Salaries, Approved Budget and Allocation Amount. Click the Get Selected Values button to view the calculated budget values. You may also use the new additional fields for Reserve Amount, Vacant Position Budget Amount or New Position Budget Amount. Six user defined fields are also provided.
9. If you are requesting a budget for approval, submit the budget for approval by clicking the Request Approval button on the Create/Approve Group Budget - Budget Requested page.
10. Compare budgets (if you created more than one budget for the same group and budget start date) on the Budget Comparison Inquiry pages.

11. Approve the budget without modification by selecting the Budget Approved check box on the Budget Comparison - Comparison page.
12. 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.
13. To approve the budget, enter dates, check the approve the budget box, and then save
14. Use the approved or unapproved budget as the basis for creating a salary increase plan.

## Understanding Budget Setup and Configuration for Group Salary Increases

This diagram illustrates the process flow required to set up group budgets for group salary increases:




Budgeting Setup Process

## Common Elements Used in This Section

**Budget Period** and **Level of Proration** Displays the control dates and the level of proration that you set up for the group in the Budget Default Values page.

**Total Count** Displays the total count of workers in the group as of the salary plan start date.

**Total FTE** (full time equivalency) Displays the total number of FTEs for the group as of the salary plan start date.

**Total Annual Salaries** and **Total Current Annual Salaries** The field is the total sum of salaries for workers who meet the following criteria:

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

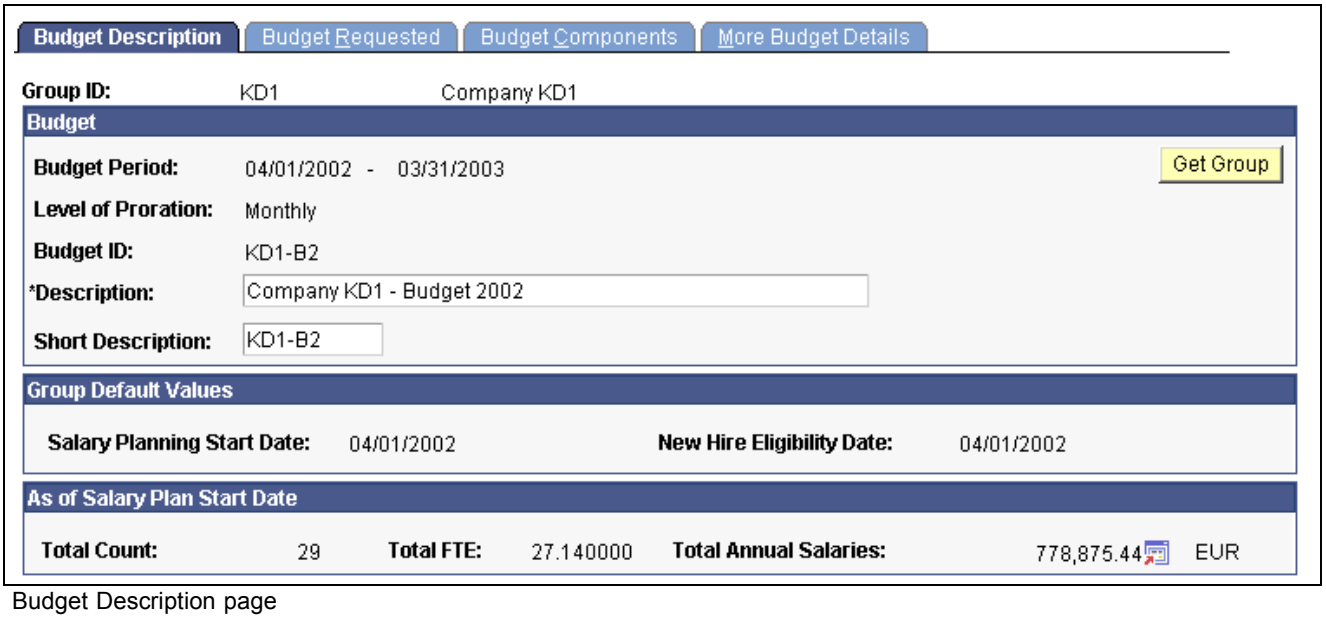
## Pages Used to Budget Group Increases

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Create/Approve Group Budget − Budget Description | GROUP_INCR_BUDGET1 | Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget | Assign a Budget ID and describe a salary increase budget for a group of workers. |
| Create/Approve Group Budget − Budget Requested | GROUP_INCR_BUDGET2 | Compensation, Base Compensation, 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. |
| Create/Approve Group Budget − Budget Components | GROUP_INCR_BUDGET3 | Compensation, Base Compensation, 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 Increases − Budget Requested page. |
| More Budget Details | GROUP_INCR_BUDGET6 | Compensation, Base Compensation, Group Budgets, Create/Approve Group Budget, More Budget Details | View specific budget amounts based on groups and action and reasons combinations.<br>Add more budget fields and create user-defined fields to store additional budget data. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Budget Calculation | RUNCTL_CALCBUDGET | Compensation, Base Compensation, Group Budgets, Calculate Group Budget | 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 Increases - Budget Components page.<br><br>It enters the totals in the Requested and Current data rows on the Create/Approve Group Budget - Budget Requested page.<br><br>You can calculate the budget using online processing if the group is small. For large groups, use this application engine process.<br><br>Define a group increase budget before using this page. |

## Setting Up a Budget Description

Access the Create/Approve Group Budget - Budget Description page.




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 Budget 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.

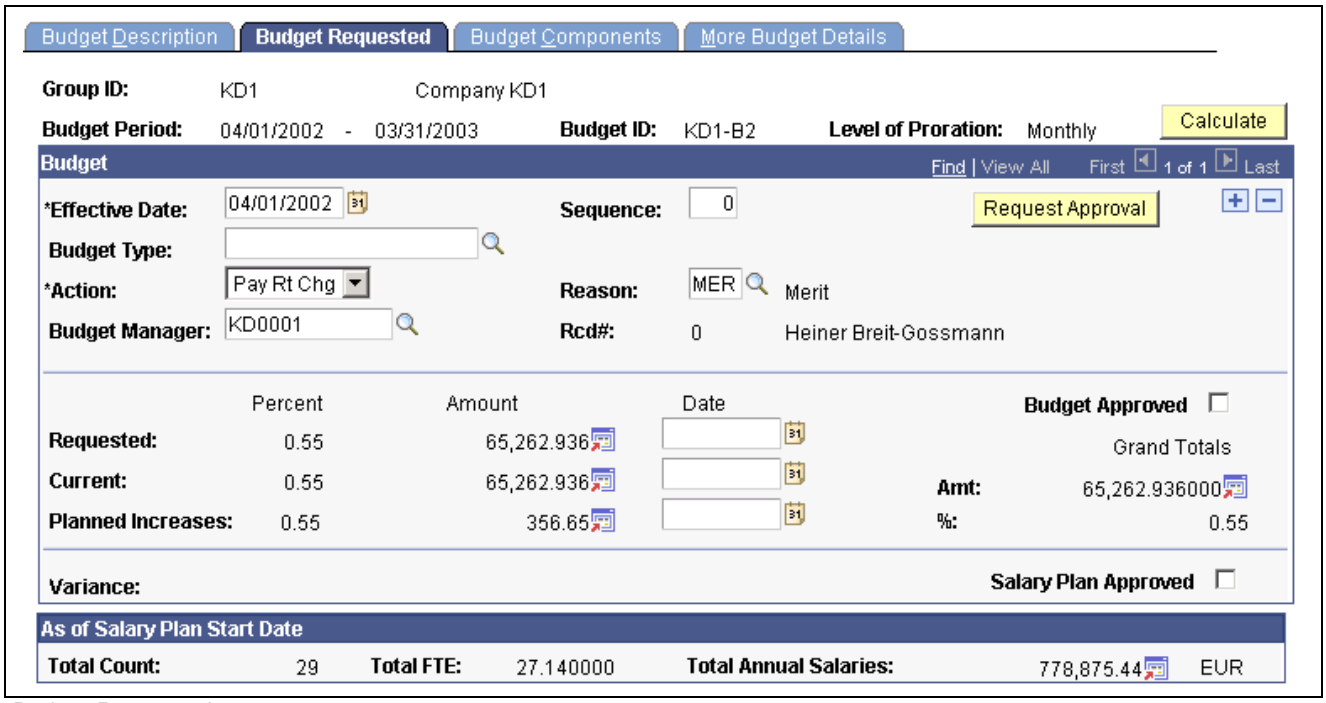
### Group Default Values

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

## Defining Budget Requests

Access the Create/Approve Group Budget - Budget Requested page.




Budget Requested page

**Effective Date** Select an effective date for the action and action reason associated with this budget. This is the effective date which will ultimately be loaded into Job Data.

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 different action reasons.

**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 different 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 an action code and action reason for the same effective date.

You may have the same effective dates for pay rate changes for merit and promotions, and other types, using specific effective sequences.

**Budget Type**

Select a budget type from the available values. The values come from the Define Budgets page. The default value for this field appears.

**Action**

Select from these values associated with this budget: *Demotion, Pay Rt Chg* (pay rate change), *Posn Chg* (position change), and *Promotion.* The default value for this field appears.

**Reason**

Select from the 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 worker record number.

**Rcd#**

The system enters the worker record number of the budget manager you identified.

**Calculate**

After you enter or change rate codes and increase values in the Requested Budget or Current Budget grids on the Group Increases − 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 workers' compensation rate codes that you enter in the Group Increases - 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 Summarize and Approve Raises to *Processed.* If a budget is modified, the status will automatically be set to *Proposed,* even if the status was previously *Approved.*

---

**Request Approval**

(Optional) 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.

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

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

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

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

**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. These 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 Create/Approve Group 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.

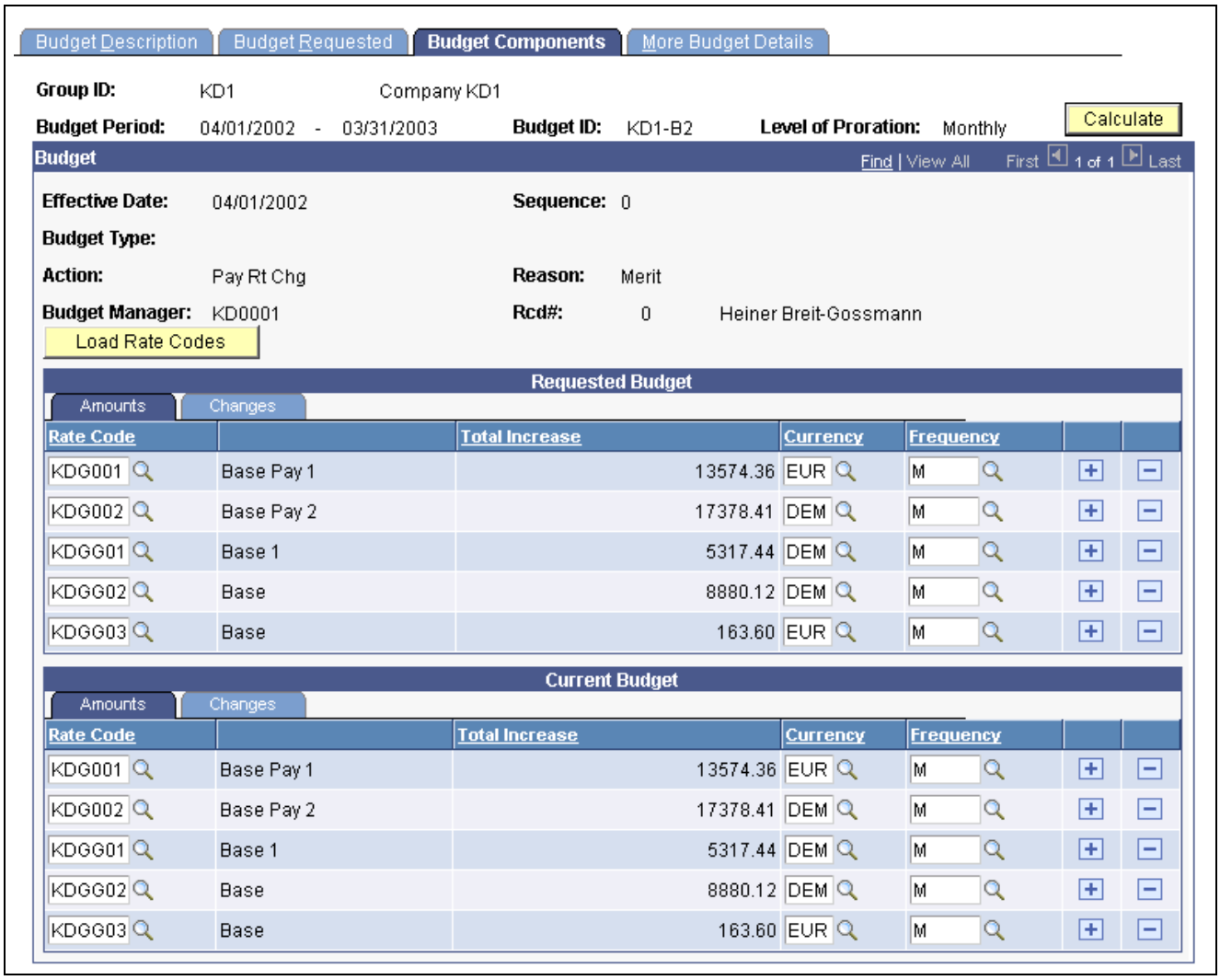
**Salary Plan Approved** The approval manager selects this check box to approve the plan. It must be selected to load the salary increases to Job Data.

### See Also

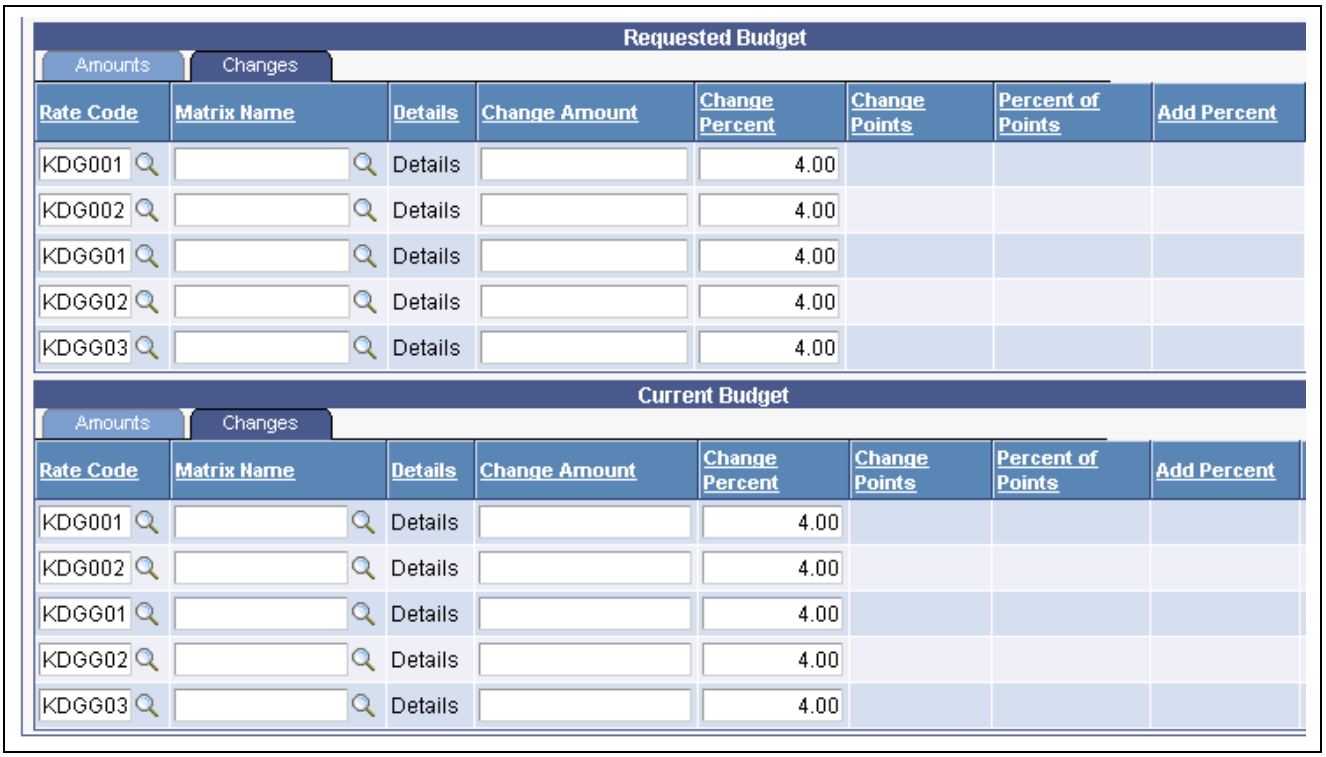
Chapter 3, “Setting Up Base Compensation and Budgeting,” Understanding Salary Increase Budgeting and Planning, page 30

## Entering and Calculating Budget Components

Access the Create/Approve Group Budget - Budget Components page.




Budget Components page




Budget Components: Changes tab

## Common Page Information

**Seq** (sequence) 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.

**Calculate** After entering or adjusting the details of the requested budget or current budget by rate code in the grids, click Calculate to calculate the budget totals. The system updates both the Current budget totals and the Requested budget totals on the Create/Approve Group Budget - Budget Requested page.

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

**Load Rate Codes** Click this button so that the system populates default values for all rate codes for group members as shown on their Job Data records.

## 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 the Propose and Summarize Raises page 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 workers in the group who have this rate code in their compensation package.

**Total Increase** Displays the result of the calculation for all workers 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 workers 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.

**Frequency** Select the frequency for the rate code. Values come from the Frequency ID table.

## Changes tab

The fields on this tab are unavailable if a salary matrix is associated with any rate code on the Amounts tab.

**Matrix Name** Select a salary matrix if you want to calculate a budget using a salary matrix.

You can enter an existing salary increase matrix name that was created using a configurable matrix. Based on the criteria of this configurable matrix, the system will then apply the appropriate increase to workers in the group when calculating the budget. Examples of criteria are performance ratings, compa-ratio or position in range.

PeopleSoft provides sample salary increase matrices. If you populate a matrix name, do not enter values in the Change Amount or Change Percent fields. When you select a salary increase matrix name, the link for Details becomes active. Click the Details link if you want to go to the matrix definition, including its current data content. This will display the relevant values that will be used during budget calculation.

**Note.** If you are using performance review as an input, the review rating must be of PERFRATING type.

**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

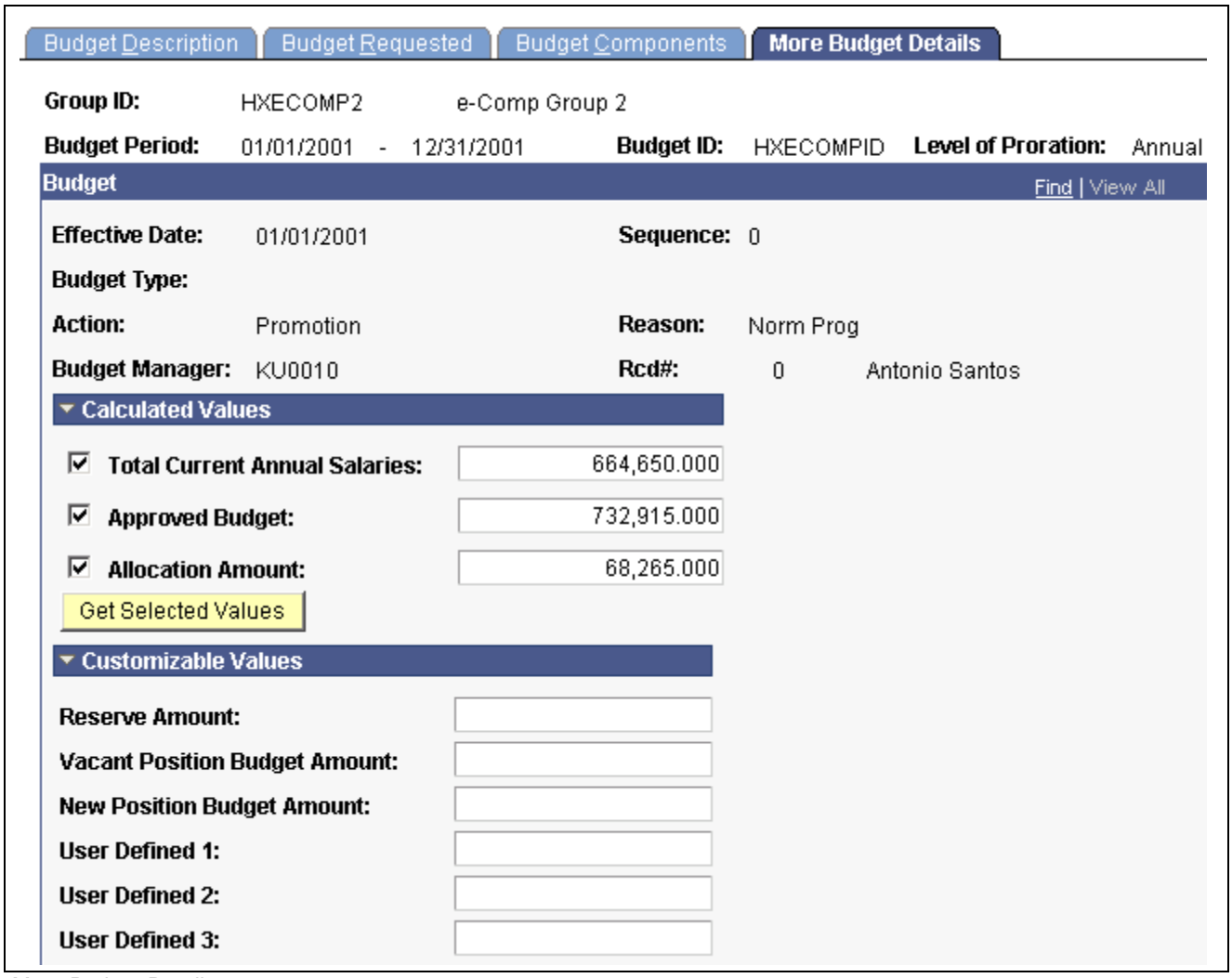
As you enter the Requested Budget details, the system copies them into the Current Budget grid. The approval manager can adjust the budget in the Current Budget grid. When you click Calculate or run the Budget Calculation process, the system calculates and enters the adjusted totals in the Current Budget row on the Group Increases - 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 Amounts and Changes tabs in the Requested Budget section.

## Viewing Budget Details

Access the More Budget Details page.



More Budget Details page

## Calculated Values

**Approved Budget** The budget as revised by the approver on the Create/Approve Group Budget - Budget Components page. This is the amount available for distribution to group members on the Propose Raises page.

**Allocation Amount** The total increase that you define in the salary increase plan associated with this budget. The amount is displayed in the budget currency and frequency.

## Customizable Values

**Reserve Amount** Use this field to store budget amounts to be saved for allocation at a later time.

**Vacant Position Budget Amount** Used to store budget amounts for vacant positions.

**New Position Budget Amount** Used to store budget amounts for new positions.

**User Defined Budget Amounts** Store additional budget values, to have all budget values in one place, and to use for reports.

# Viewing Budget Comparisons

This section discuss how to use the Budget Comparison Inquiry pages to:

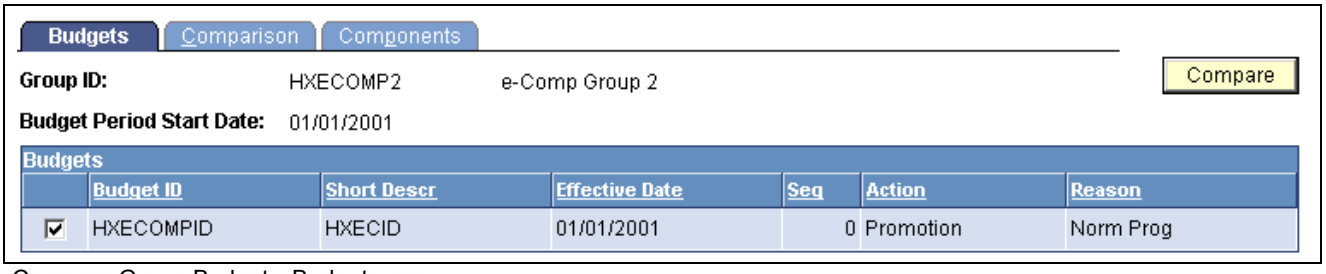
- View proposed budgets.
- View budget variances.
- View budget details.
- Approve a budget.

## Pages Used to View Budget Comparisons

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Compare Group Budgets - Budgets | BUDGET_COMPAR3_INQ | Compensation, Base Compensation, 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, Base Compensation, 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, Base Compensation, 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.




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 Increases - Budget Requested page.

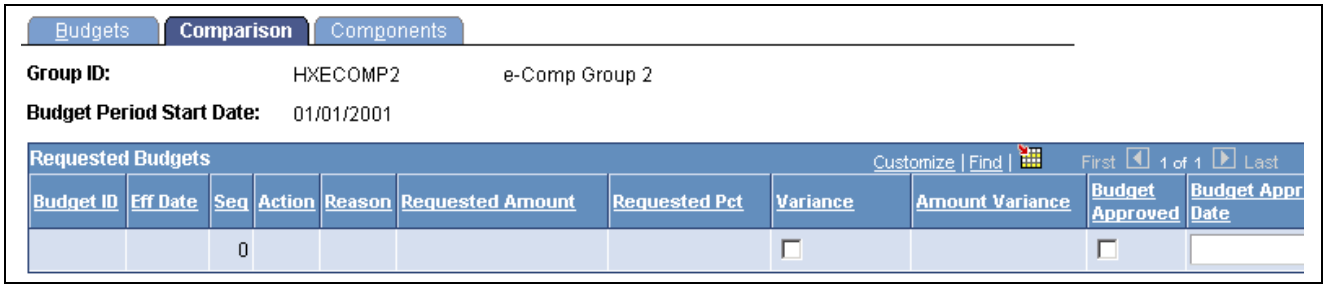
**Note.** Set up more than one group increase budget for the group ID and budget period start date before using this page.

**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.

# Viewing Budget Variances

Access the Compare Group Budgets - Comparison page.




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 Increases - 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 Increases −Budget Requested page.
- The individual worker increases must be marked Approved on the Summarize and Approve Raises page.

# Planning Group Salary Increases

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

- Integrate worker 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 Group Increases components located under Set Up HRMS, Product Related, Compensation, Base Compensation, Group Increases and the Group Budgets components under Compensation, Base Compensation, Group Budgets 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 worker's compensation package by rate code, the pages provide information about the worker's compa-ratio, percent in range, last increase date, salary history, and review results. This information helps you make decisions about adjusting the budgeted increase for individual workers without looking elsewhere in the system.

Here's how you use the Group Increases and Group Budgets components 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 workers in the group.

   For small groups, use online processing instead of the batch process. To use online processing, click the Calculate button 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 button on the Summarize and Approve Raises page to update the current budget on the Create/Approve Group Budget - Budget Requested page.
4. View summary information on the Summarize and Approve Raises page.
5. Approve worker 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 worker individually.
6. Approve the Salary Plan on the Create/Approve Group Budget - Budget Requested page.

### Integration of Worker Reviews and Salary Increase Planning

If you use salary increase guideline matrices that are associated with a salary plan, the system calculates whether the new salary figure is under, over, or meets increase guidelines established for the review rating and percent in range.

### Calculating Salary Increases Based on the Budget

The system can calculate worker increases using either of the following methods:

- The Salary Plan Calculation application engine process.
- Online processing on the Propose Raises page.

If you are using a salary increase matrix created as a configurable matrix to calculate the budget, then the system uses the criteria on the Data Content page to apply increases to each worker.

## Pages Used to Plan Group Salary Increases

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Salary Plan Calculation | RUNCTL_SALPLNGRP | Compensation, Base Compensation, Group Increases, Calculate Group Increases | Run the Salary Plan Calculation application engine process.<br>This process is recommended for calculating large groups. |
| Propose Raises | SALARY_PLAN_GRP | Compensation, Base Compensation, Group Increases, Assign Group Increases | Apply the group increase budget to the pay components of the workers in the group. You can manually enter pay components and modify salary increases for workers in the group. |
| Summarize and Approve Raises | SAL_PLAN _GRP_APPR | Compensation, Base Compensation, 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, Base Compensation, Group Increases, Assign Group Increases | Displays budget information. |

## Calculating Group Increases

Access the Salary Plan Calculation page.

Salary Plan Calculation page

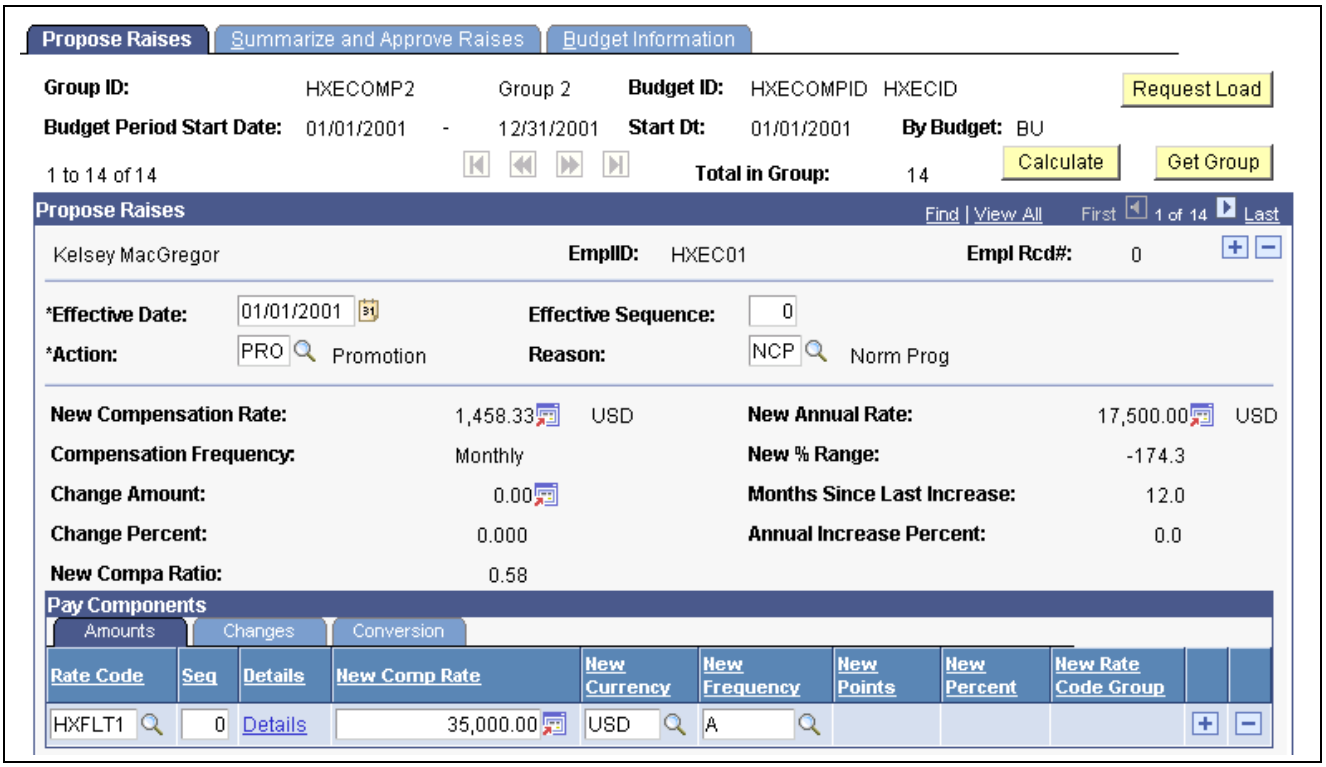
**Approve All Increases?** Select this check box if you want to function as the Approve All button on the On-line Salary Plan Calculation Process page.

Use this page to calculate budgets for large groups of workers.

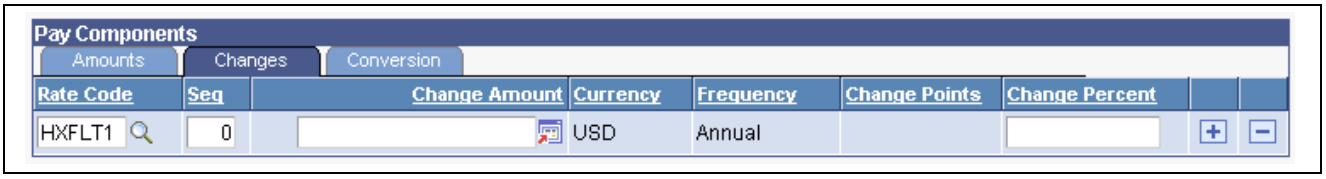
If the check box is cleared, the system calculates the salary plans as indicated.

# Applying Group Increases

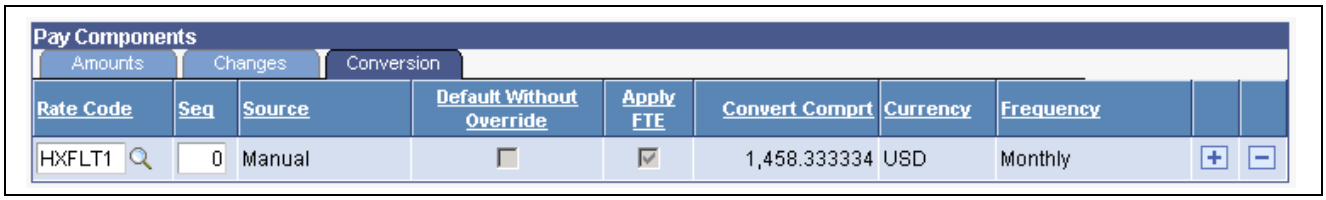
Access the Propose Raises page.



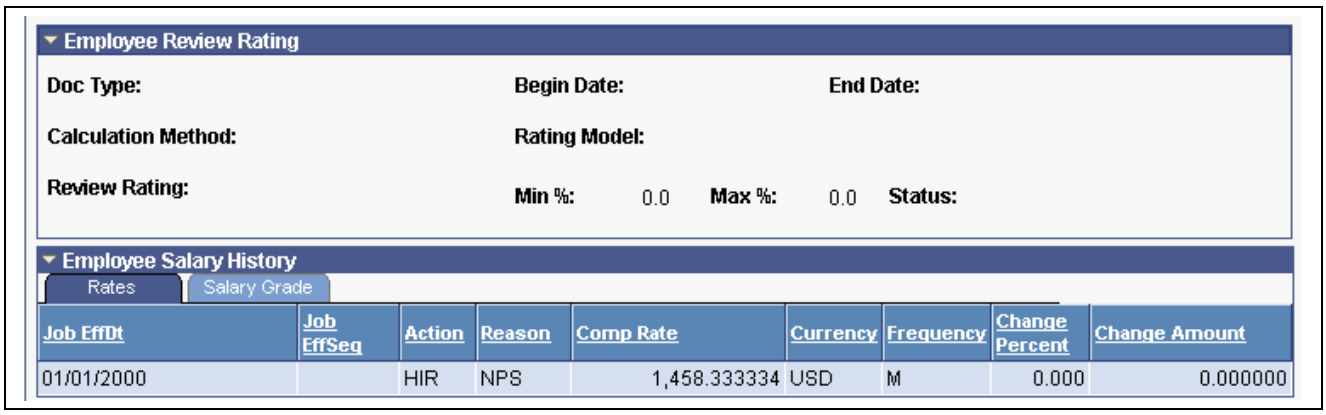

Propose Raises page (1 of 5)



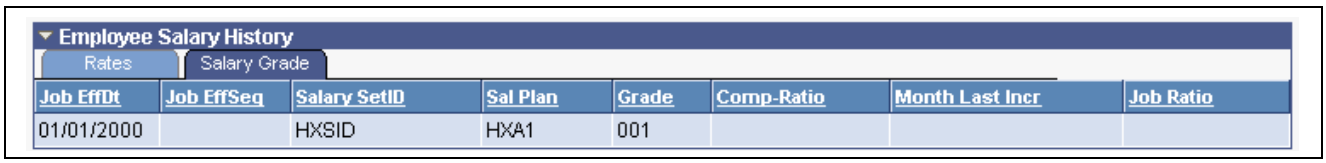

Propose Raises page (2 of 5)




Propose Raises page (3 of 5)




Propose Raises page (4 of 5)




Propose Raises page (5 of 5)

You must create a group increase budget for the worker'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 Create/Approve Group 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 worker 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.

**Calculate** — Click 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.** Do not click this button after adjusting worker raises on this page unless you want to return to the budgeted increases without any modifications.

**Get Group** — Click to load the group into the page and to make sure the workers 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 workers added to the group.

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

**Total in Group** Displays the total number of workers in the group.

## 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 worker's compensation package. If you want to add additional salary components to the worker's compensation package or to increase components that were not originally budgeted, add these manually in the Pay Components grid on this page.

**Effective Sequence** Select the sequence number of the action that you defined for the budget increase on the Create/Approve Group Budget − Budget Requested page.

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

**Action** and **Reason** Select the action and reason that you defined for the budget increase on the Create/Approve Group Budget - Budget Requested page.

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

**Compensation Frequency** Displays the currency code and frequency specified in the worker's Job record. This is the currency and frequency in which the calculations appear.

**Change Amount** Displays the amount of the worker's total increase for this effective date, sequence, action, and reason for all components of the budget that are in the worker's compensation package.

**Change Percent** Displays the worker'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 worker's compensation package.

**New Compa Ratio** Displays the worker's new compa-ratio. The system calculates the compa-ratio figure from the data in the Salary Grade Table.

**New Annual Rate** The system calculates and displays the worker's new annual rate by applying the budgeted increase for this effective date, sequence, action, and reason to the applicable rate codes in the worker's compensation package.

| | |
|---|---|
| **New % Range** (new percent in range) | Displays the worker's new percent in range. The system calculates the percent in range figure from the data in the Salary Grade Table. |
| **Months Since Last Increase** | Displays the number of months since the worker's last increase. |
| **Annual Increase Percent** | Displays the worker's annualized change in terms of percent. |
| **Job Ratio** | Displays the Job Ratio of the job code assigned to this worker. The Job Ratio is derived from the values in the Job Ratio group box on the Job Code − Default Compensation page and the worker's comp rate. |

## 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 Calculate, the system applies the increases to the rate code. To recalculate and refresh the data on the Create/Approve Group Budget - Budget Requested page after you manually add or change data here, click the Refresh button in the Grand Total section of the Summarize and Approve Raises page.

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**Note.** Do not click the Calculate button after you make manual changes on this page because you will lose your manual changes. Instead, click the Refresh button in the Grand Total section of the Summarize and Approve Raises page. The Refresh button updates the requested budget on the Budget Requested page.

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

---

## Amounts tab

| | |
|---|---|
| **Rate Code** | Displays the rate codes in the worker's compensation package. If you are manually entering a new data row you can select a rate code from the valid values. |
| **Seq** (sequence) | Displays the sequence number of the rate code in the compensation package. |
| **Details** | Click to view details for the rate code. |
| **New Comp Rate** (new compensation rate) | Displays the compensation rate for the rate code after applying the new amount, percent, or points. |
| **New Currency** | If you want the rate code to have a different currency, you can select that currency here. For points-type rate codes, this field is not available for change. |
| **New Frequency** | If you want the rate code to have a different frequency, you can select that frequency here. Valid values are stored on the Frequency table. |
| **New Points** | If you proposed an additional point value for the rate code, displays the new point value here. |
| **New Percent** | If you proposed a different percent value for the rate code, displays the new percent value here. |
| **New Rate Code Group Name** | You can select a different rate code group for the percent increase. |

### Changes tab

**Rate Code** Displays the rate codes in the worker's compensation package. If you are manually entering a new data row you can select a rate code from the valid values.

**Seq** Displays the sequence number of the rate code in the compensation package.

**Change Amount** Displays the proposed change in the amount of compensation for the rate code, in the currency and frequency of the rate code.

**Change Points** If the rate code type is Points, Displays the proposed change in the points for the rate code. You can enter a value for a new data row if the rate code type is Points.

**Change Percent** Displays the proposed percent of change in the compensation for the rate code.

### Conversion tab

**Source** Indicates how the pay component got into the pay components grid. Values are:

- *Manual*: Indicates that the pay component was added manually.
- *Salary Step*: Indicates that the pay component was a default value from the salary step.
- *Job Code*: Indicates that the pay component was defaulted in from the Job Code, and so on.

**Default Without Override** Used for multiple components of pay.

**Apply FTE** The system indicates whether Apply FTE is selected for this rate code in the Comp Rate Code Table.

**Convert Comprt** (converted compensation rate) Displays the compensation rate for the rate code converted to the worker's compensation frequency and currency.

### Worker Review Rating

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

### Worker Salary History - Rates tab

In this section, view each salary change in the worker's salary history over time. The fields in this section detail each salary change and are the same as those found in the worker's Job record.

**Job EffDt** (job effective date) and **Job EffSeq** (job effective sequence) The effective date and effective sequence of the change in the worker's compensation.

**Action** and **Reason** The action and reason that resulted in the change in the worker's compensation, as recorded in the Job record.

**Comp Rate** (compensation rate) The worker's compensation in the Job record for the job effective date, job effective sequence, action, and reason.

**Currency** and **Frequency** The currency and frequency of the worker's compensation in the Job record for the job effective date, job effective sequence, action, and reason.

**Change Percent** and **Change Amount** — The percent of change and amount of change in the worker's compensation for the job effective date, job effective sequence, action, and reason.

### Employee Salary History - Salary Grade tab

**Job EffDt** (job effective date) and **Job EffSeq** (job effective sequence) — The effective date and effective sequence of the change in the worker's compensation.

**Salary SetID** — The setID associated with the worker's salary.

**Sal Plan** (salary plan) and **Grade** — The salary plan and salary grade associated with the worker's job row.

**Comp-Ratio** (compa-ratio) — The worker's compa-ratio for this job row, calculated from data in the Salary Grade Table.

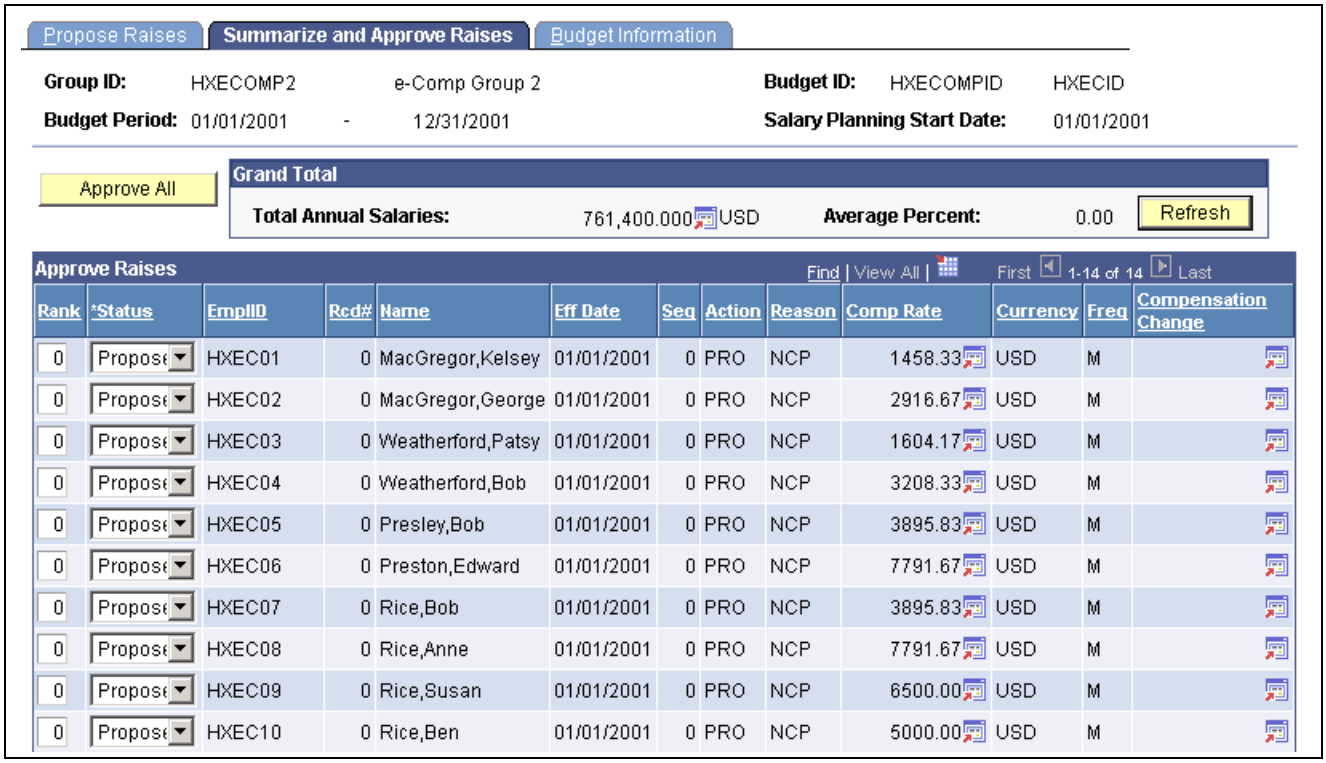
**Month Last Increase** — The number of months since the previous salary increase.

### See Also

Chapter 7, "Budgeting and Planning Salary Increases," Viewing Budget Information, page 135

## Viewing the Salary Plan Summary

Access the Summarize and Approve Raises page.




Summarize and Approve Raises page

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

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

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

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

### Approve Raises

Displays the following information for each worker 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 workers to appear in an order other than by worker ID. Use this field for force ranking, such as listing workers from the highest increase to the lowest.

**Status** Select from the 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.

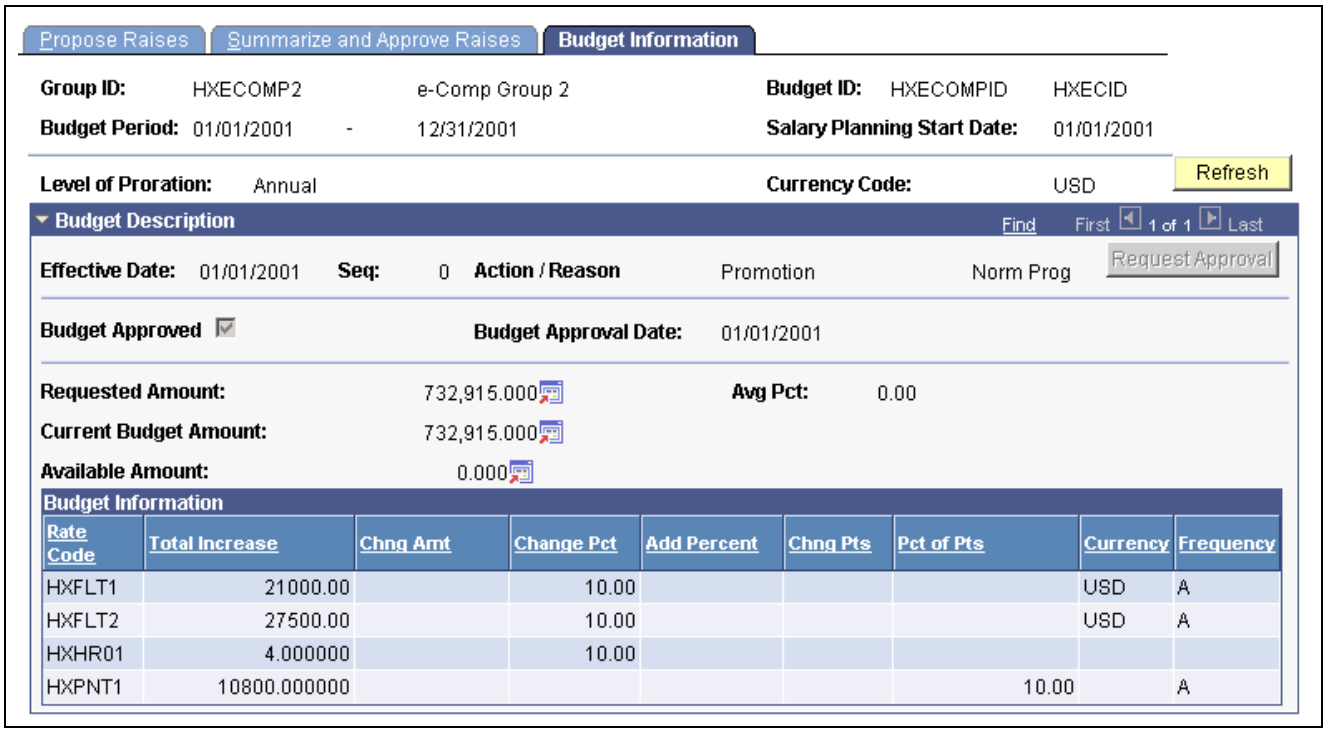
**Note.** If the Status is *Processed,* then you can't modify the Status manually.

**Name** Displays the name of the worker for each member of the group.

**Compensation Change** Displays the change in the worker's compensation.

## Viewing Budget Information

Access the Budget Information page.




Budget Information page

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

**Refresh** Click 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 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.

# 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 workers' 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 worker 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 Create/Approve Group 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:

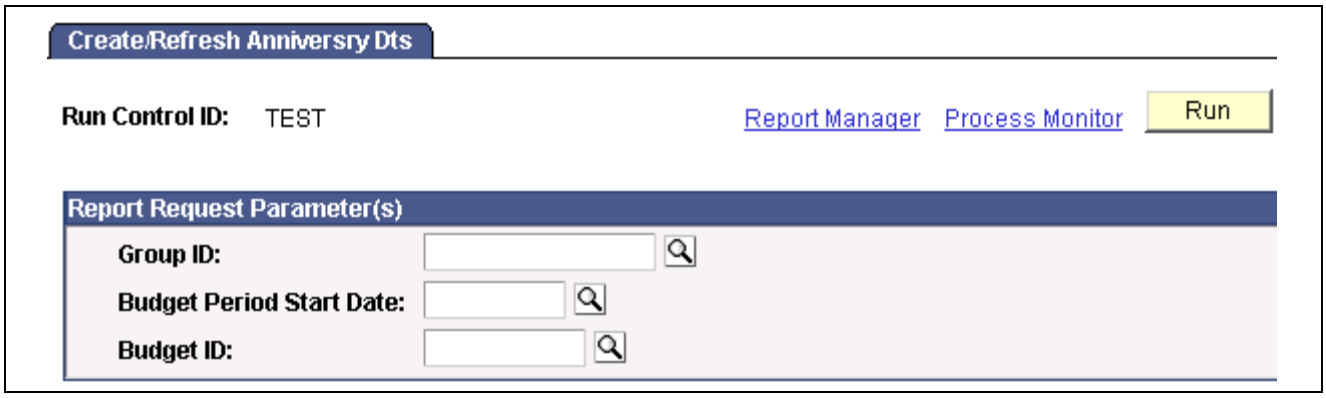
- Salary Plan Approved must be selected on the Create/Approve Group Budget − Budget Requested page.
- The individual worker increases must be marked *Approved* on the Summarize and Approve Raises page.

## Pages Used to Refresh Anniversary Dates

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Create/Refresh Anniversry Dts (create/refresh anniversary dates) | RUNCTL_GRPANNV | Compensation, Base Compensation, 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 workers in your group. |
| Load Salary Changes | RUNCTL_CMP006 | Compensation, Base Compensation, Group Increases, Load Group Increases | Run the Load Salary Changes application engine process. The process loads all the new rows into your workers' job and compensation records for the budget date that you specify. |

## Creating and Refreshing Anniversary Dates

Access the Create/Refresh Anniversry Dts page.




Create/Refresh Anniversry Dts page

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

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

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

## Running Salary Changes

Access Load Salary Changes page.

Load Salary Changes page

Before using this page, the salary increase budget must be approved. Each worker 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 workers who have a position.

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

# (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 worker'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 Budget Default Values page and the Group Default Values page, you need to calculate the salary increase for the worker.

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 worker compensation quartile.
3. Determine the increase percentage.
4. Update worker 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 worker 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 Worker Compensation Quartile

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

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

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

Once we've determined the worker'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 worker's salary grade.

Determine the worker's quartile using this formula:

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

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 worker's monthly salary is 2166.67, we determine that this worker 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 worker 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 worker will receive a salary increase percentage of 7 percent.

### Step 4 - Update Worker Data with the New Raise Percentage

Go to the Budget Components 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 worker's new salary, change amount, and change percent appears.

### See Also

Chapter 3, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps, page 14

# CHAPTER 8

# Defining, Assigning, and Approving Merit Increases

This section discusses how to:

- Define merit increase IDs and groups.
- Assign, approve, and load merit increases.

## Defining Merit Increase IDs and Groups

This section describes how to:

- Define merit increase IDs.
- Define review points resolution.
- Define merit groups.

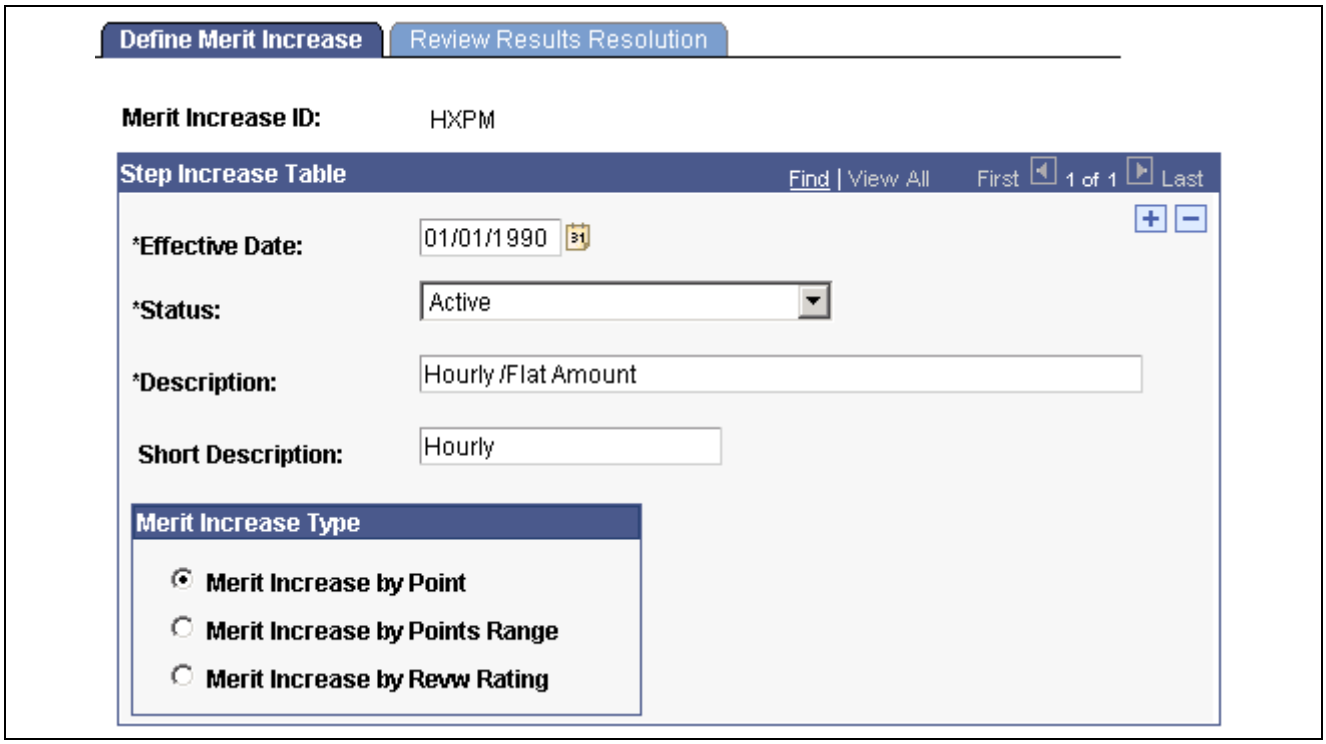
**Note.** Before you can assign and approve merit increases for workers you must first define Merit Increase IDs and Merit Groups.

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

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Define Merit Increase | SP_MERIT_INCR_DEFN | Compensation, Base Compensation, Merit Increases, Define Merit Increase | Use to define Merit Increase IDs for merit points or merit ranges. |
| Review Points Resolution | SP_MERIT_INCREASES | Compensation, Base Compensation, 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, Base Compensation, Merit Increases, Define Merit Group | Define review selection criteria for a Group ID. The system will use the information to retrieve worker reviews. |

### Defining Merit Increase IDs

Access the Define Merit Increase page.



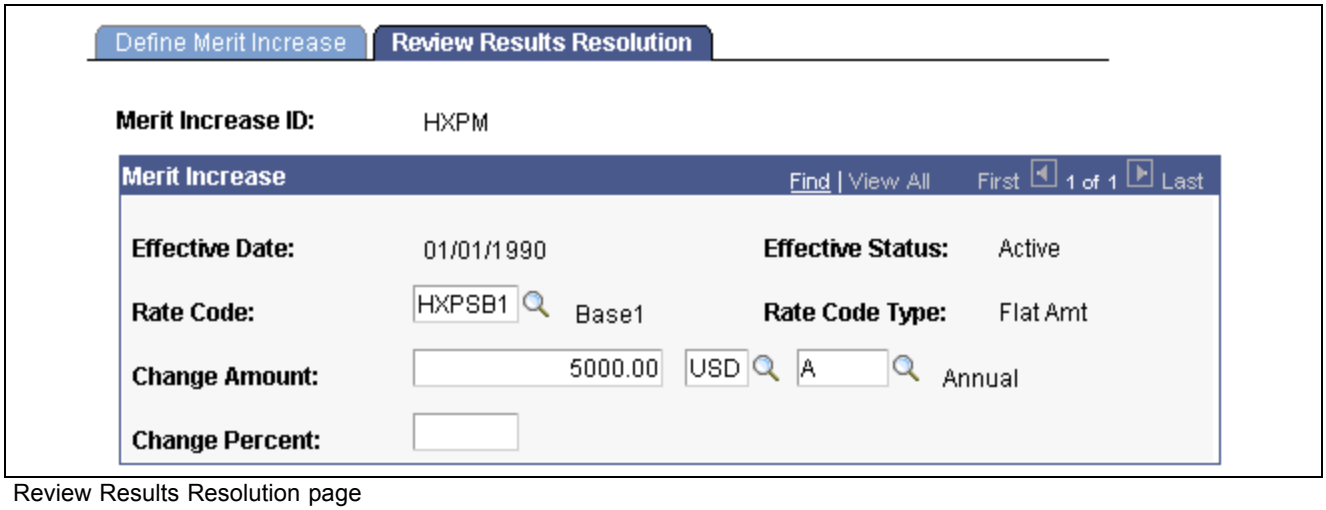

Define Merit Increase page

Enter a description of the Merit Increase ID.

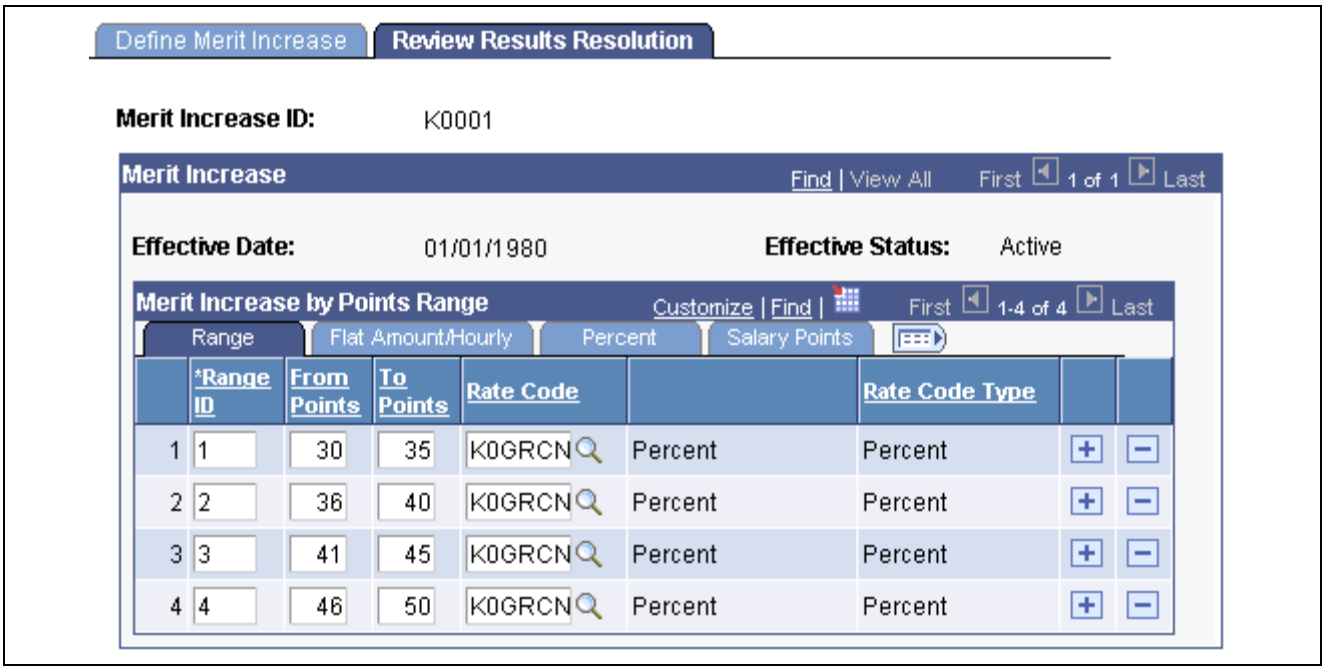
**Merit Increase Type** Indicate if the merit increase is by point (Merit Increase by Point), by point range (Merit Increase by Points Range), or by review rating (Merit Increase by Revw Rating). The system will display different fields on the Review Points Resolution page depending on which option you choose.

# Defining Review Points Resolution

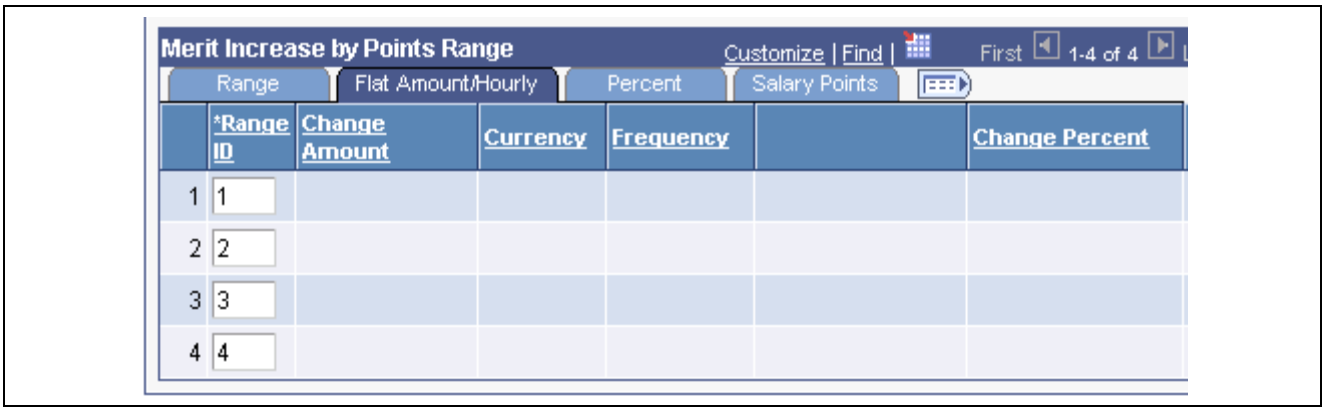
Access the Review Points Resolution page.



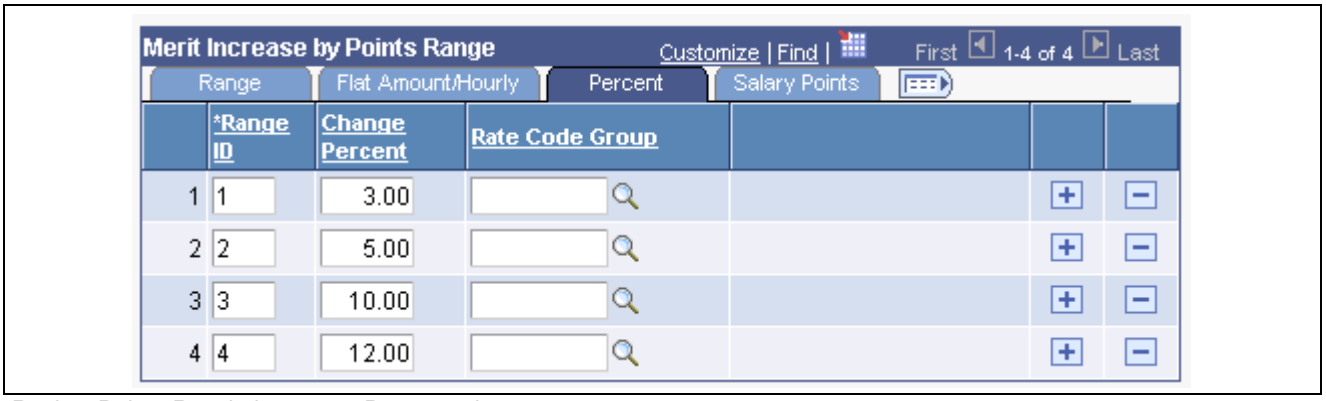

Review Results Resolution page



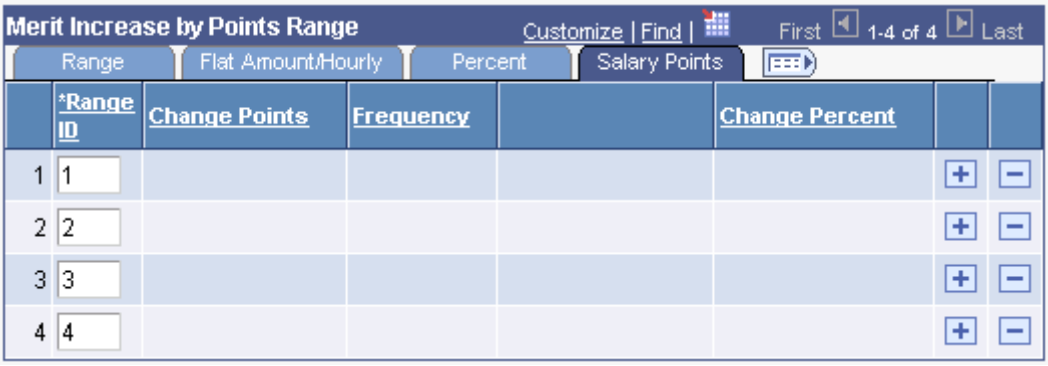

Review Points Resolution page: Range tab




Review Points Resolution page: Flat Amount/Hourly tab




Review Points Resolution page: Percent tab




Review Points Resolution page: Salary Points tab

**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.

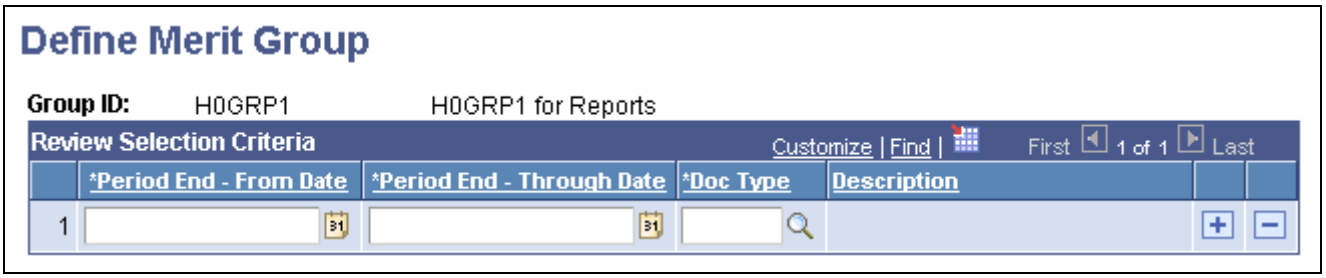
**Range ID, From Points**, and **To Points** Enter a Range ID and the from and to salary points of the range.

**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 workers 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

This section describes how to:

- Assign and approve merit increases.
- Review merit increase details.
- Load merit increases.
- Report merit increases.

Use the Assign/Approve Merit Increases component to:

- View the approved and completed review results for a group of workers (as defined on the Define Merit Group component).
- Calculate merit increases for a group of workers 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 workers in the group.

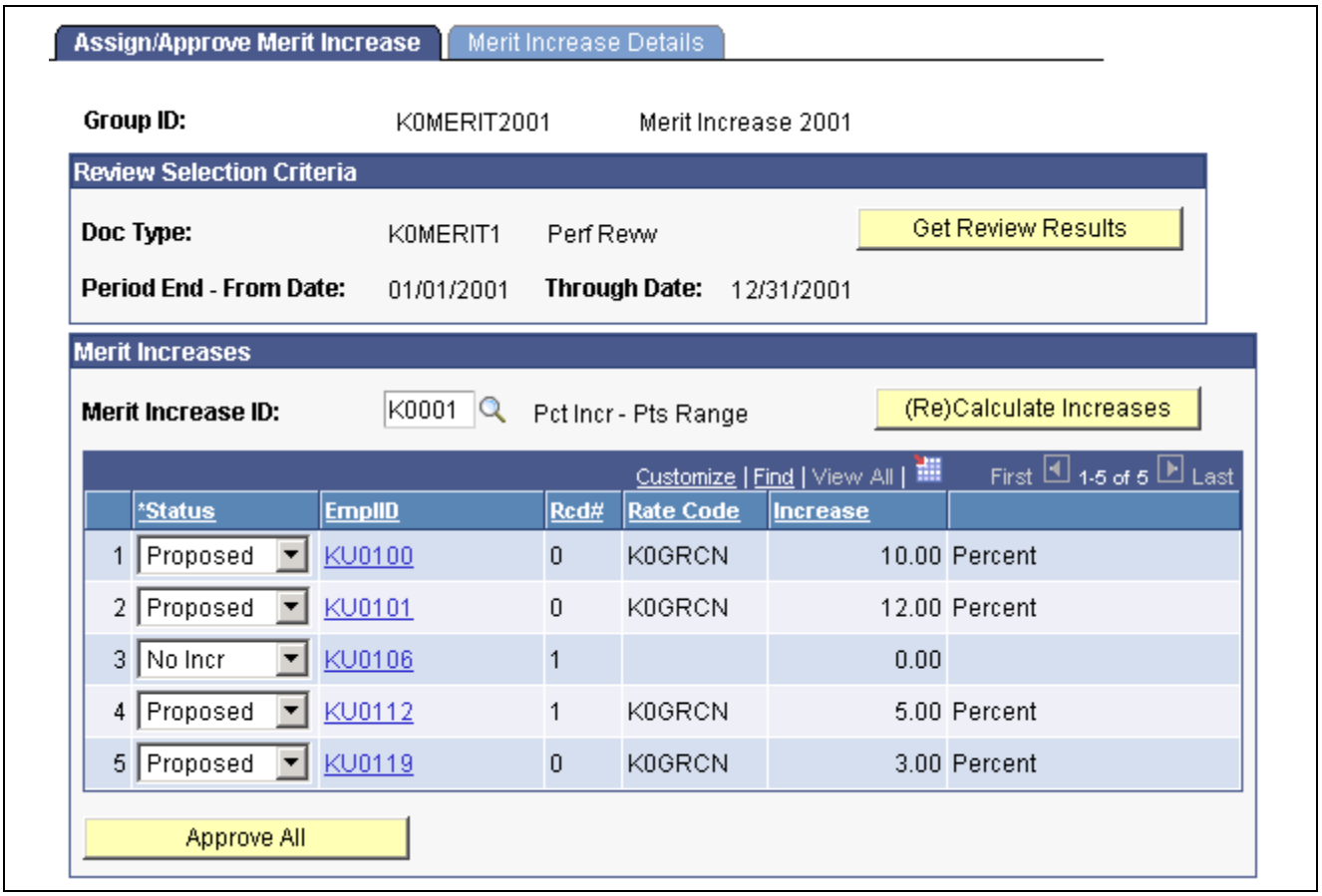
Once you have assigned merit increases and selected to approve or deny the increases, you can load the increase information into the Job table using the Load Merit Increases process.

## Pages Used to Assign and Approve Merit Increases

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

## 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 workers 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 worker 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 worker'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 worker 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 worker 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 worker. You cannot modify the merit increase or status for this worker.

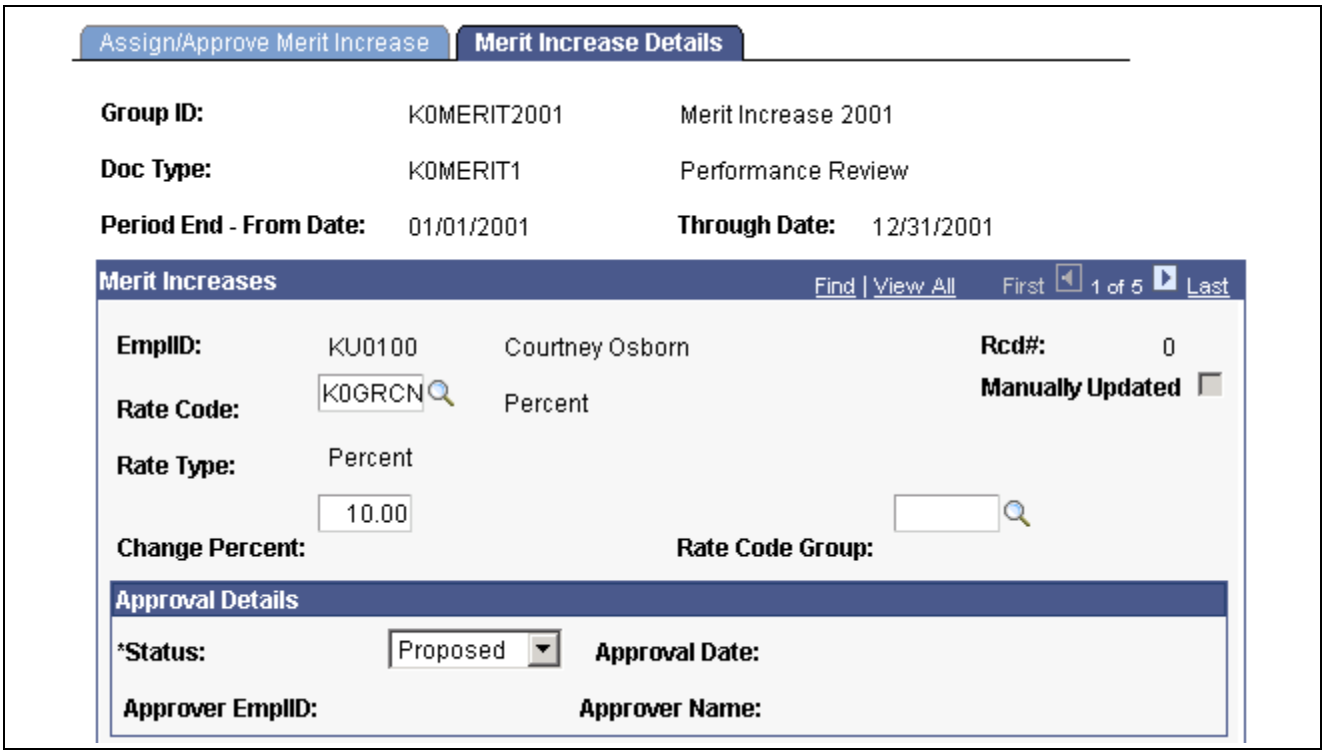
**Note.** You can make manual changes to a worker's merit increase on the Merit Increase Details page before selecting a status.

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 a worker's merit increase on the Merit Increase Details page before approving all the merit increases.

## Reviewing Merit Increase Details

Access the Merit Increase Details page.




Merit Increase Details page (1 of 2)

Merit Increase Details page (2 of 2)

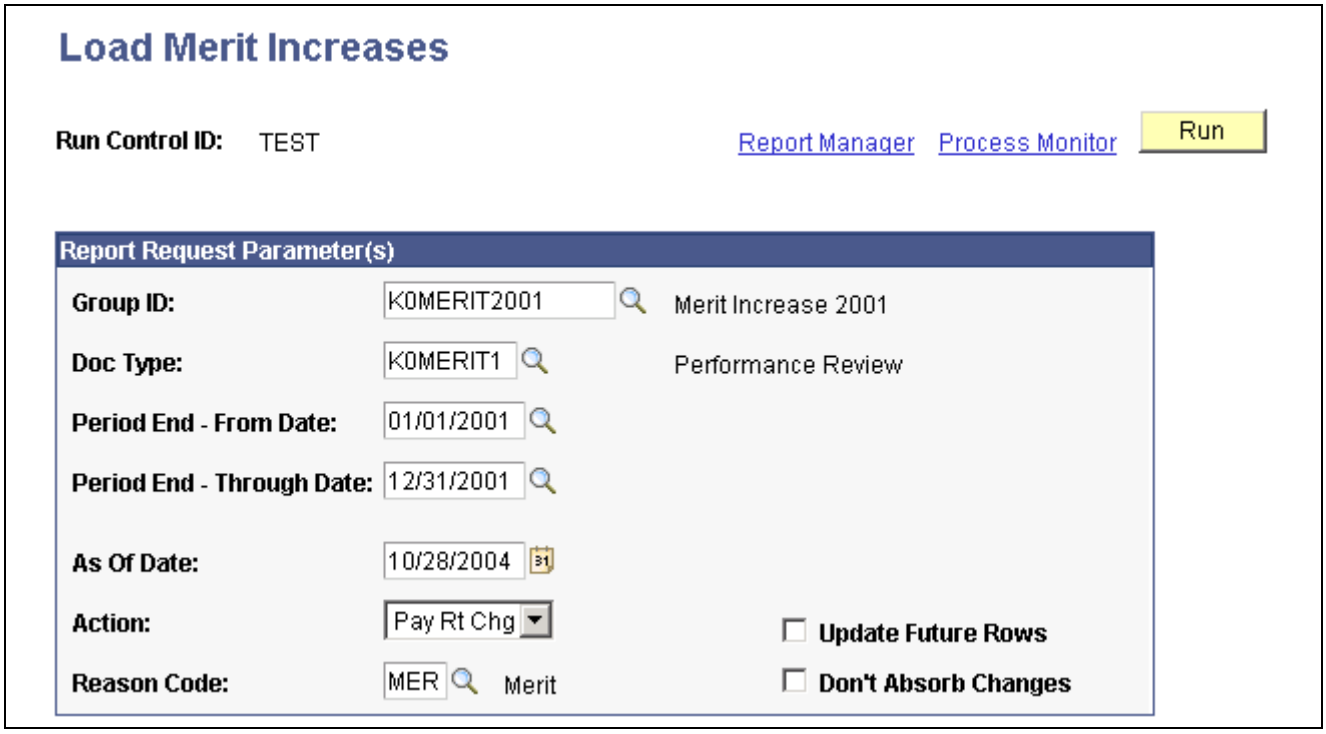
**Rate Code** If changes are necessary, select a Rate Code to associate with this Merit Increase ID. If you select a Rate Code with a Rate Code Type of:

- *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 worker'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 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 workers 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.

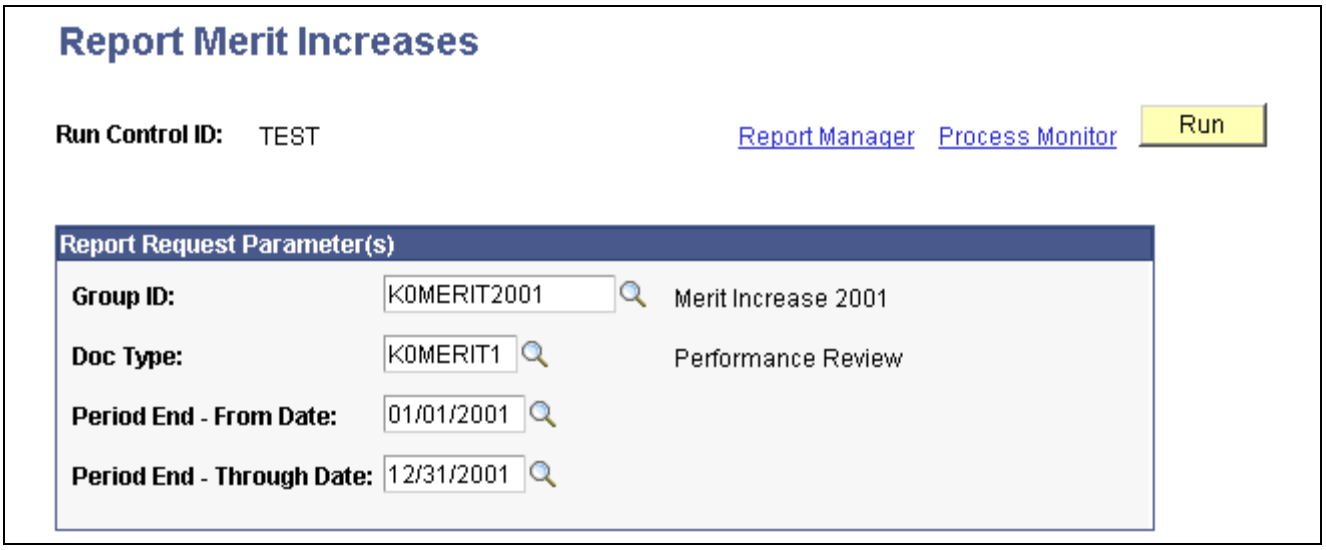
**Action**and **Reason Code** Select the action and reason associated with the merit increase for the selected workers.

**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 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 workers whose merit increase data you want to report on.

# CHAPTER 9

# 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

To update salaries by salary plan or pay group, use the Update by Sal Plan/Paygroup (RUNCTL_CMP008) component.

This section provides an overview of updating salaries and discusses how to update the job compensation rate.

### Understanding Salary Updating

Use the Update by Sal Plan/Paygroup (update by salary plan or paygroup) process to perform salary grade or step updates for all workers 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 workers 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 worker'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 worker 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. In a separate run, run process HR_SP_CI using PeopleSoft Application Engine to load data to the Job Data pages for your workers.

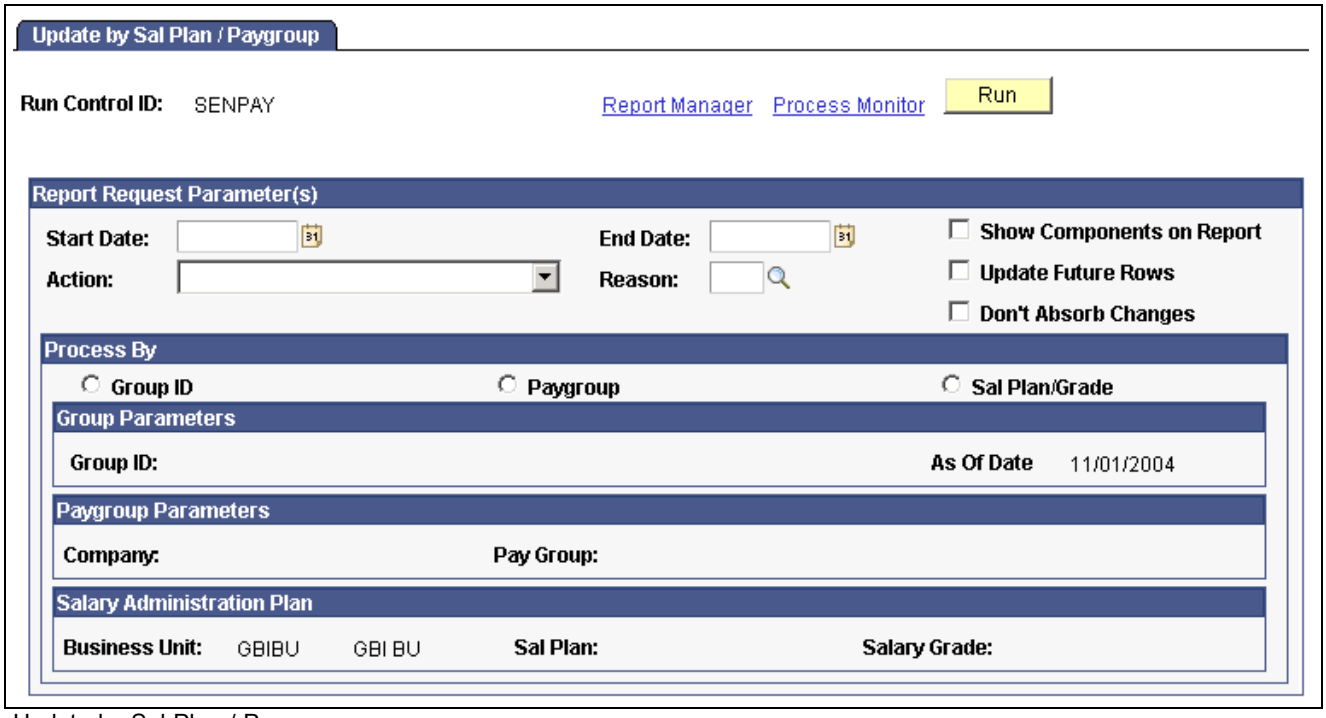
**Note.** You run all these processes from the same run control page but you must have run the CMP008 Application Engine program and SQR report to completion before you run the HP_SP_CI Application Engine program.

# Page Used to Run the Sal Plan/Paygroup Process

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Update by Sal Plan / Paygroup | RUNCTL_CMP008 | Compensation, Base Compensation, Maintain Plans, 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 workers 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 Base Compensation and Budgeting," Defining Salary Plan Characteristics, page 17

# Updating Salaries by Job Code

To update salaries by job code, use the Update by Job Code (RUNCTL_CMP010) component. Use the CI_JOB_CODE_TBL component interface to load data into this component interface.

This section provides an overview of the Update by Job Code process and discusses how to reclassify a job code.

## Understanding the Update by Job Code Process

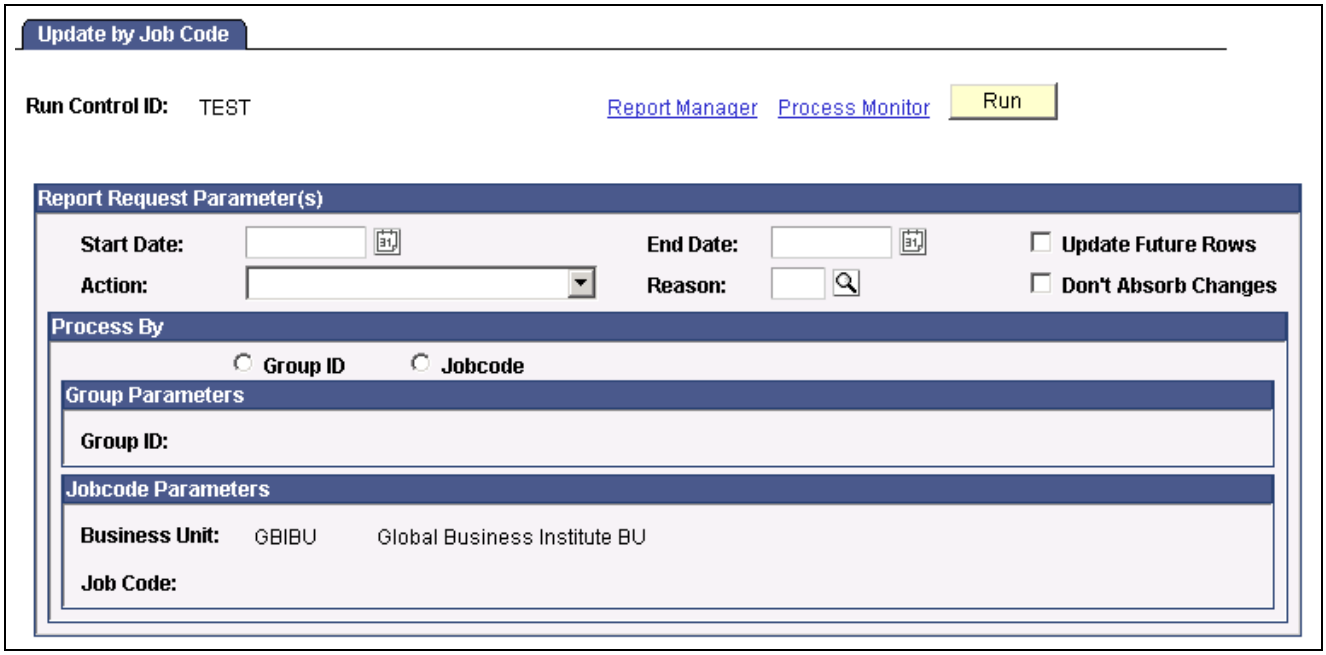
Use the Update by Job Code process to update salary data for all workers in a job code when you change the job code salary administration plan, grade, or step in the Job Code Table. The process inserts a new job row with the action and action reason codes that you specify on the Run Control page. The 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, Base Compensation, Maintain Plans, Update by Job Code | Reclassify a job code. |

# Reclassifying a Job Code

Access the Update by Job Code page.




Update by Job Code page

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

**Job Code** Select the job code that you are updating.

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

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

## See Also

Chapter 8, "Defining, Assigning, and Approving Merit Increases," Pages Used to Assign and Approve Merit Increases, page 146

# (USF) Administering Mass Pay Adjustments

To administer mass pay adjustments for federal workers, use the Mass Pay Adjustments USF (MASS_PAY_SETUP) component.

This section helps you identify the processes necessary to administer pay adjustments and shows you how to:

- Defining a mass pay type.
- Defining a mass pay plan.
- Defining mass pay adjustments.
- Generate a mass pay adjustment report.

## Understanding Mass Pay Adjustments

With PeopleSoft Human Resources for U.S. Federal Government, you can administer and manage mass pay adjustments.

During the calendar year, the President or his pay agent may authorize changes in the salary structures for executive branch workers covered by Title 5 of the United States Code. This authority also extends to other workers covered under other sections of Title 5, as well as some workers 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 workers. These authorities generally authorize pay adjustments for salaried workers 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 workers on the Mass Pay Adjustments page.
3. Generate a mass pay adjustment report.

## 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 in 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

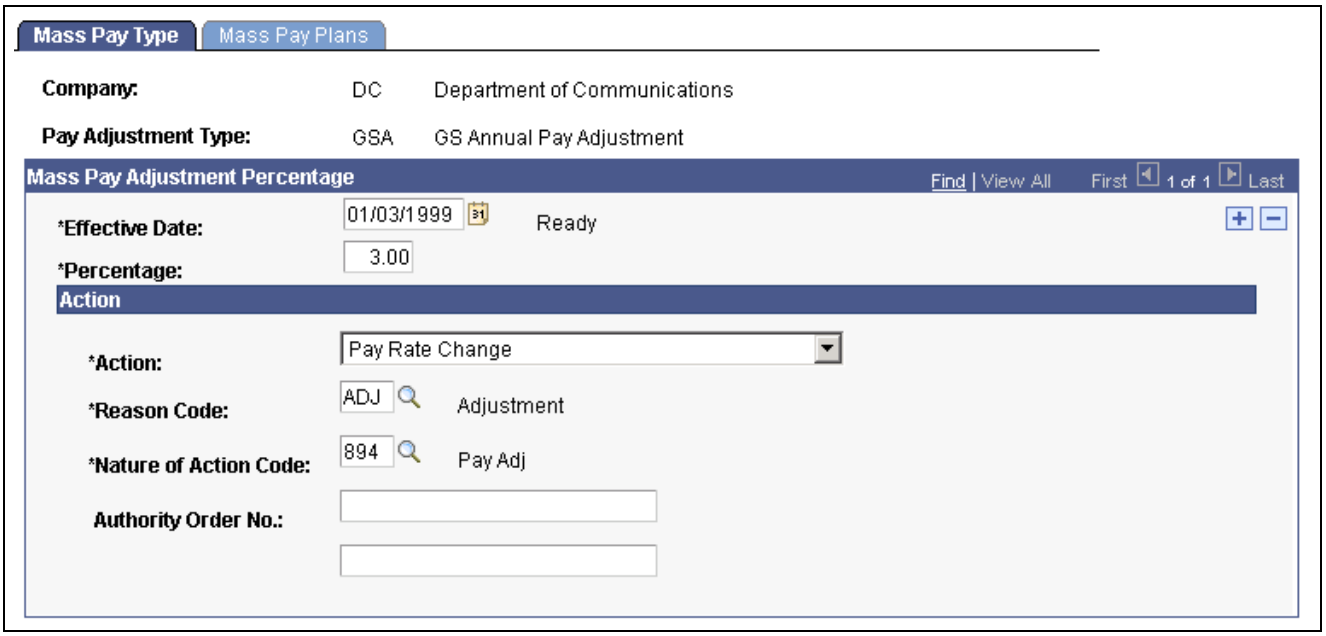
**Note.** Mass pay adjustments can be processed using either a percentage increase or calculated using the updated pay table salaries. Once the pay adjustment has been calculated, the Next Scheduled Pay Adjustment data on the Salary Plan table needs to be updated in order for any additional pay adjustments.

## 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, Payroll for North America, Compensation and Earnings, 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 Plans | GVT_MPA_ERNPGM_TBL | Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, 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 Pay Tables | GVT_MPA_PAYTBL_SEC | Set Up HRMS, Product Related, Payroll for North America, Compensation and Earnings, Mass Pay Adjustment USF, Mass Pay Plans<br>Click the Pay Tables link. | Click to view the pay table associated with the mass pay adjustment. |
| Mass Pay Adjustment | RUN_FGPY005 | Set Up HRMS, Product Related, Payroll for North America, 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 a Mass Pay Type

Access the Mass Pay Type page.



Mass Pay Type page

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

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

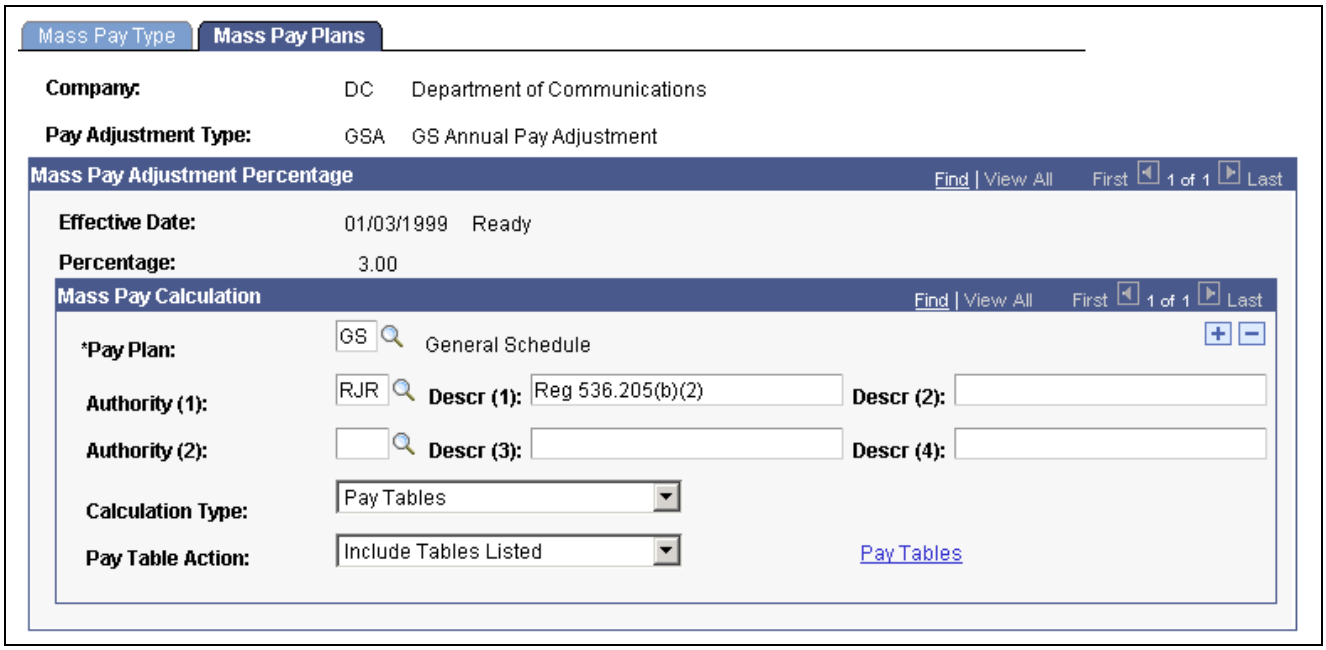
**Reason Code** Enter the corresponding reason code for the specified action. The value selected here will be reflected on the Data Control page at the worker level.

**Nature of Action Code** Enter the NOA code that justifies this mass pay.

**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.




Mass Pay Plans page

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

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

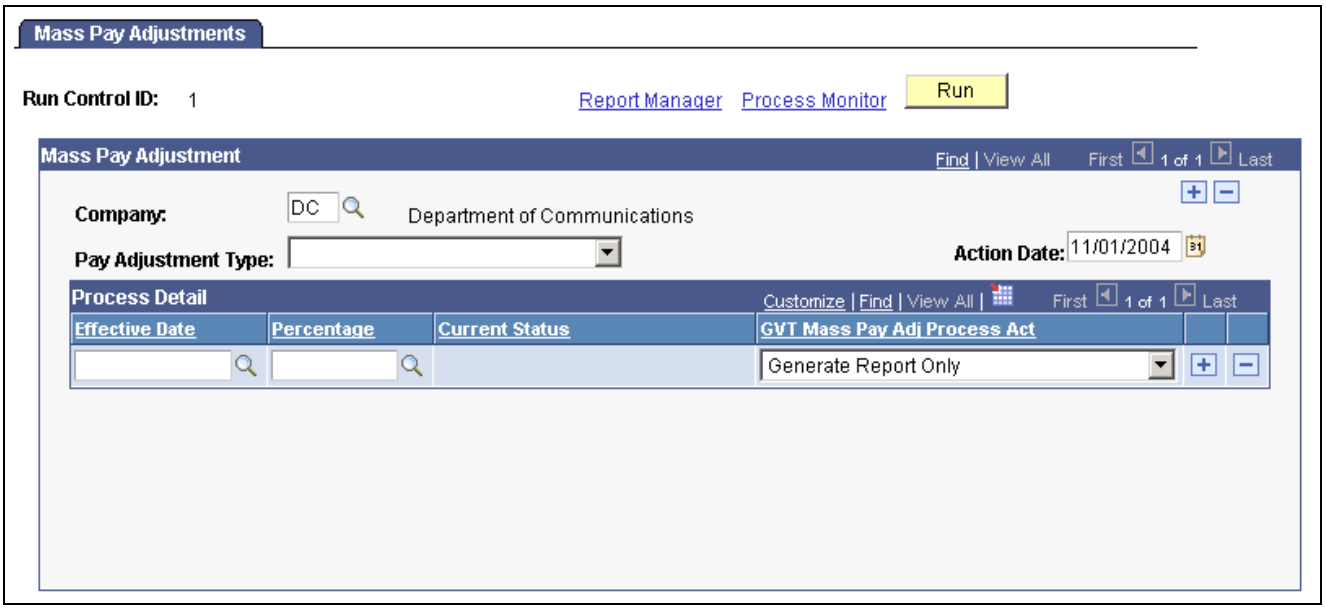
**Calculation Type** Specify the type of calculation to be used in pay adjustment processing: *Pay Tables, Percentage,* or *Special Calculation Routine.*

**Pay Table Action** Specify which pay table entries should be included or excluded from the pay adjustment. 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 specify the pay tables to include or exclude when processing this Mass Pay Adjustment.

# Defining Mass Pay Adjustments

Access the Mass Pay Adjustments page.




Mass Pay Adjust page

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

**Percentage** Specify the percentage of the pay adjustment.

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

---

**Note.** Make sure that there is an entry for Mass Pay (FGPY005) for the *USFED* transaction on the Transaction Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions). Click the Batch Programs tab to check if the USFED transaction is included.

---

# Generating a Mass Pay Adjustment Report

The Mass Pay Adjustment report lists workers who cannot be processed. For one condition or another, the workers listed in this error report failed to be updated.

You can generate this report only after running the pay adjustment process. This report should *not* be run with the processing of the adjustment since it relies on a table that is created by that process – otherwise, no results will be generated. If you run this report prior to processing the Mass Pay Adjustment, you'll be able to determine which workers have an exception. You can then process the exceptions manually.

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

- Pay Rate Determinant of worker − 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 worker.
- No hourly conversion factor for worker standard hours.
- The FEGLI base rate is not updated because of the override flag.

Once the Mass Pay Adjustment process has been executed, then the Mass Pay Type Definition you created will be updated with a status of Processed.

# CHAPTER 10

# (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 worker review results.
- Simulation of salary increases and manual adjustments.
- Loading of salary increases to worker 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 worker 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 worker 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 worker reviews that have been resolved into a review band, meaning that worker 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 worker's job record effective dates, action and action reason, and job code. The load process terminates for the worker and reports the worker 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 in This Section

**Language** Required because, although this batch process is a load process, there may be an error list that you need to read.

**SetID** Enter the setID for the review ID that the system should use to calculate the worker's review-based salary increase. Because you can link a single review ID to multiple setIDs, you must identify the review by its setID and its own ID.

**Review ID** Enter the ID of the review on which the selected process is to base its load.

# Updating Salaries by Step Increase

This section provides an overview of the step increase process and describes how to:

- Set up step increases.
- Process step increases.

## Understanding the Step Increase Process

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 worker'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 worker's review band, you can run a process to load the salary step increases for each worker.

**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:

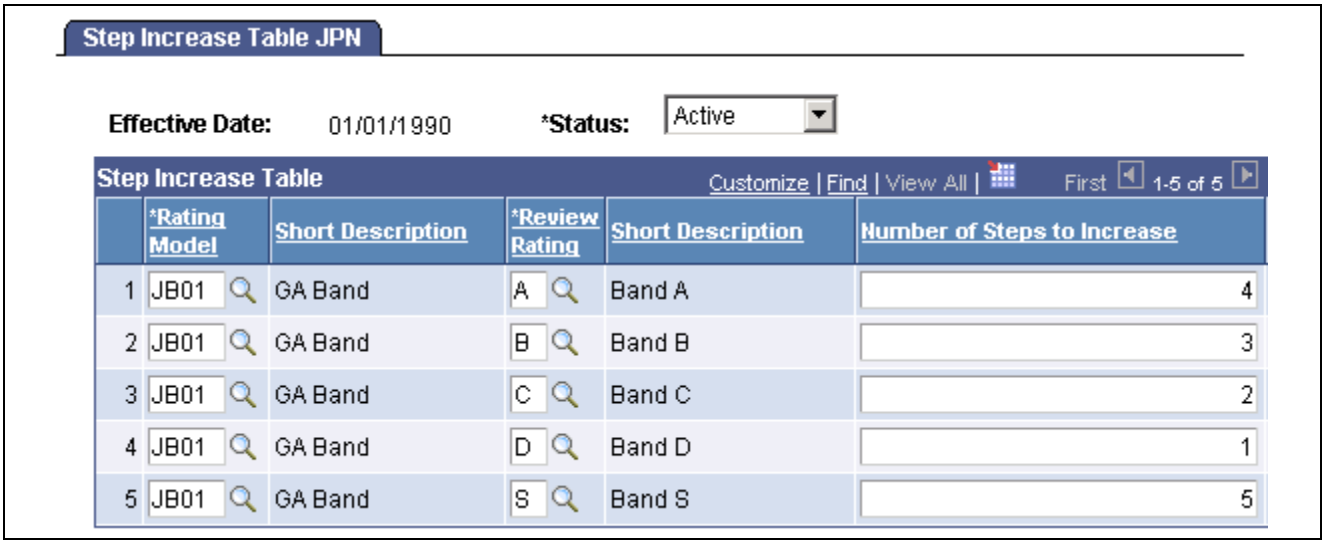
1. Set up review bands and the number of steps to increase.
2. Run the JPN Load Salary Steps process.

# Pages Used to Update Salaries by Step Increase

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Step Increase Table JPN | STEPINC_TBL_JPN | Compensation, Base Compensation, Step Increase JPN, Define Step Increase | Associate several salary step increases with a review band. |
| Load Salary Steps JPN | RUN_STEP_JPN | Compensation, Base Compensation, Step Increase JPN, Load Salary Steps | Update the salary step and associated compensation on the job record for workers who have a fixed amount Plan/Grade/Step-based salary component. |

# Setting Up Step Increases

Access the Step Increase Table JPN page.



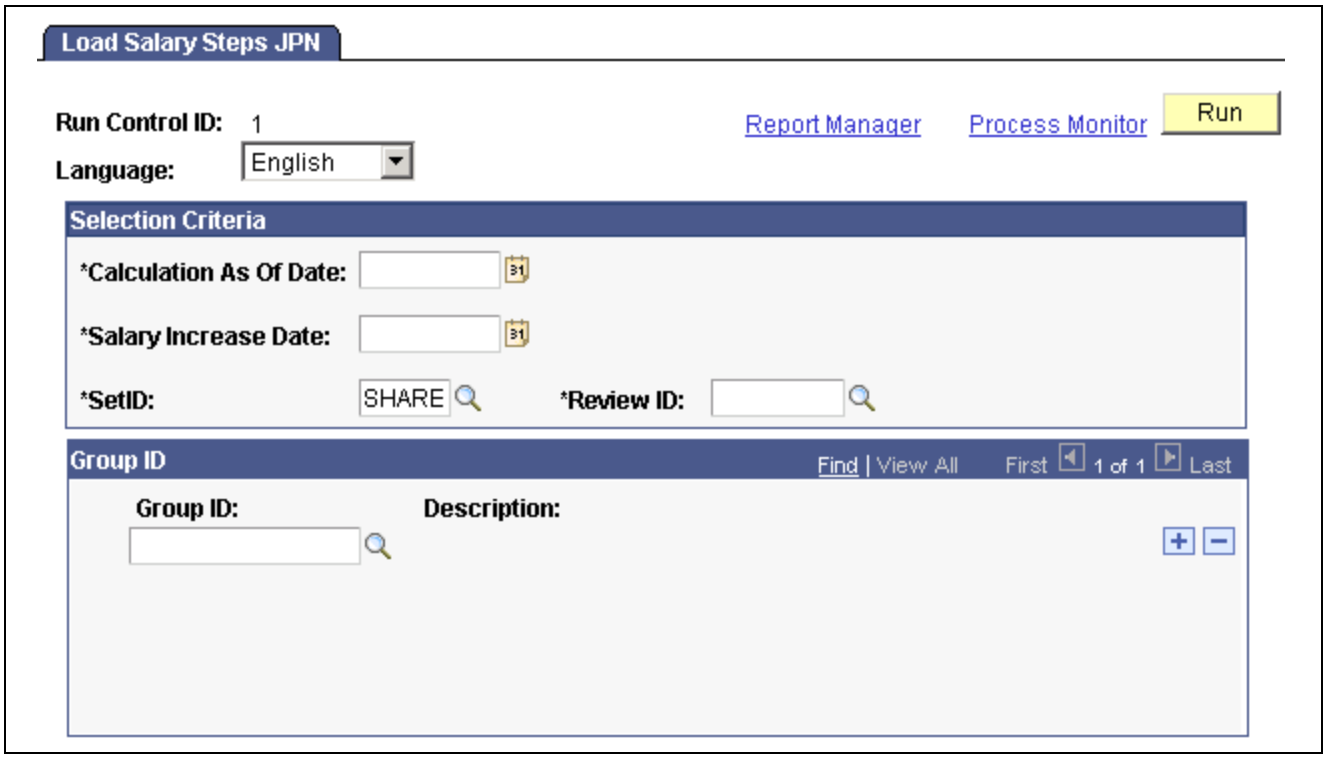

Step Increase Table JPN page

**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. Workers 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 worker's current data to calculate the new data. For example, if the worker's review band earns the worker 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 worker 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 workers 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

This section provides an overview of the salary amount increase process and describes how to:

- Set up salary amount increases.
- Process salary amount increases.

## Understanding the Salary Amount Increase Process

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 worker'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 worker's review band, you can run a process to load the salary increase for each worker.

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:

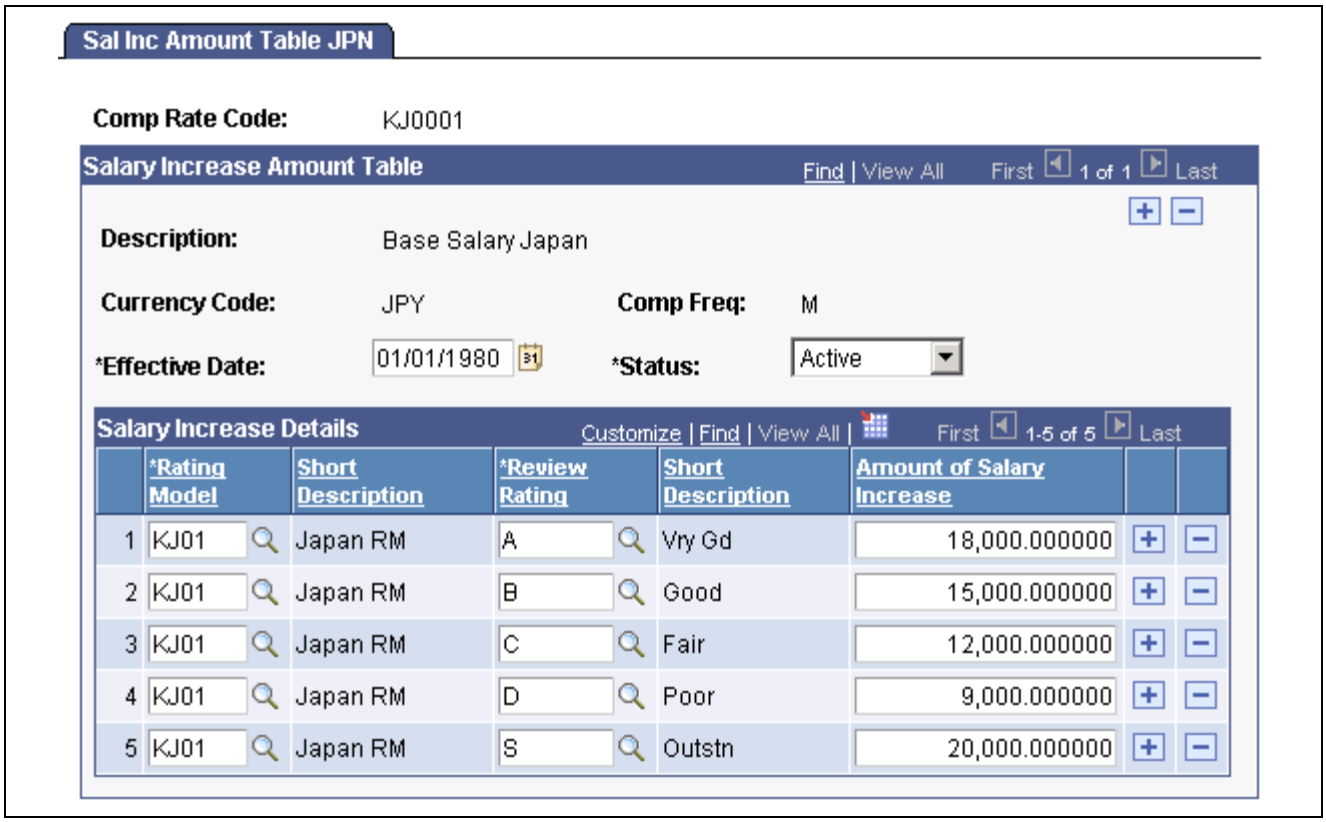
1. Set up rate codes, review bands, and increase amounts.
2. Run the JPN Load New Salary Amount process.

## 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, Base Compensation, 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, Base Compensation, 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.



Sal Inc Amount Table JPN page

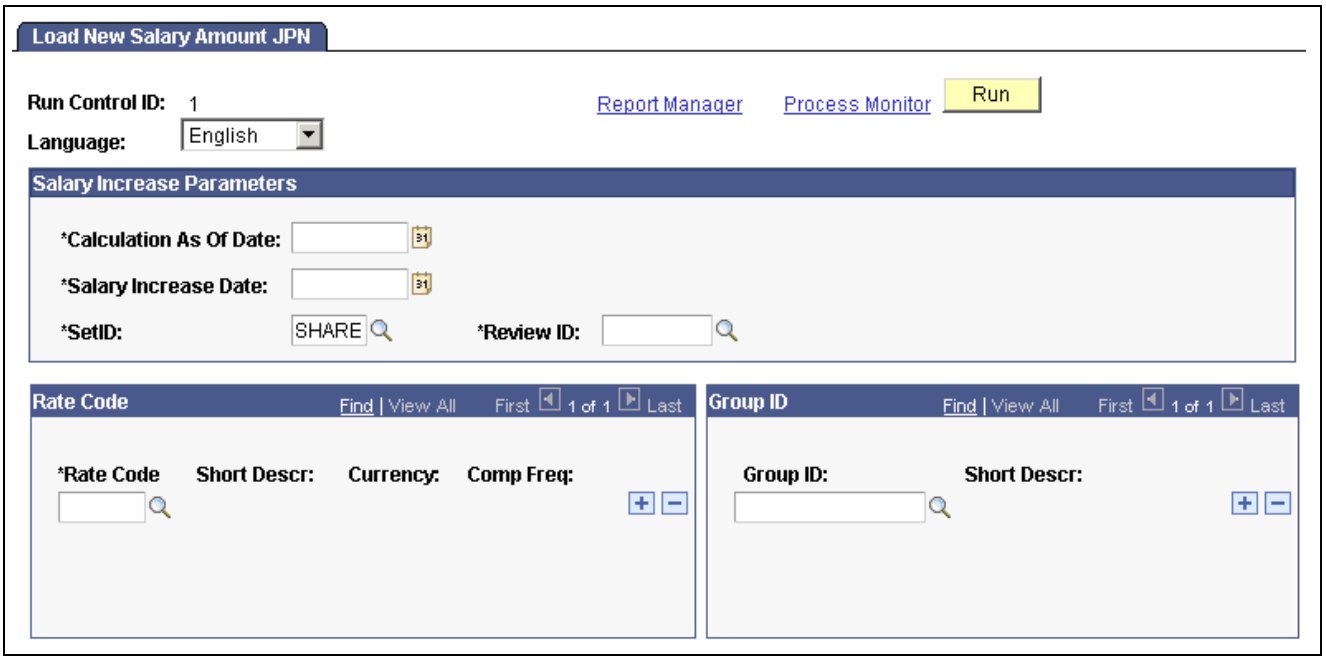
To do so, enter the compensation rate code whose value you're updating. The comp rate code must*not* be of class *SENPAY* and must be of type *Flat Amount.*

**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 workers 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 worker's current data to calculate new data. For example, if the worker's review band earns the worker 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 worker 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 workers to be included in this process. Leave this blank to have job compensation records updated for all workers who have the rate code that you specified. If a worker in a group that you specify doesn't have the comp rate code that you specified for processing, the system skips the worker without processing.

# Updating Salaries by Percentages

This section provides an overview of the update salaries by percentage process and describes how to:

- Define salary increase IDs.
- Process salary increases.

- Run a salary increase simulation.
- Run the salary simulation report.
- Load salary increases.

## Understanding the Update Salaries by Percentage Process

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 workers, 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 workers' 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:

---

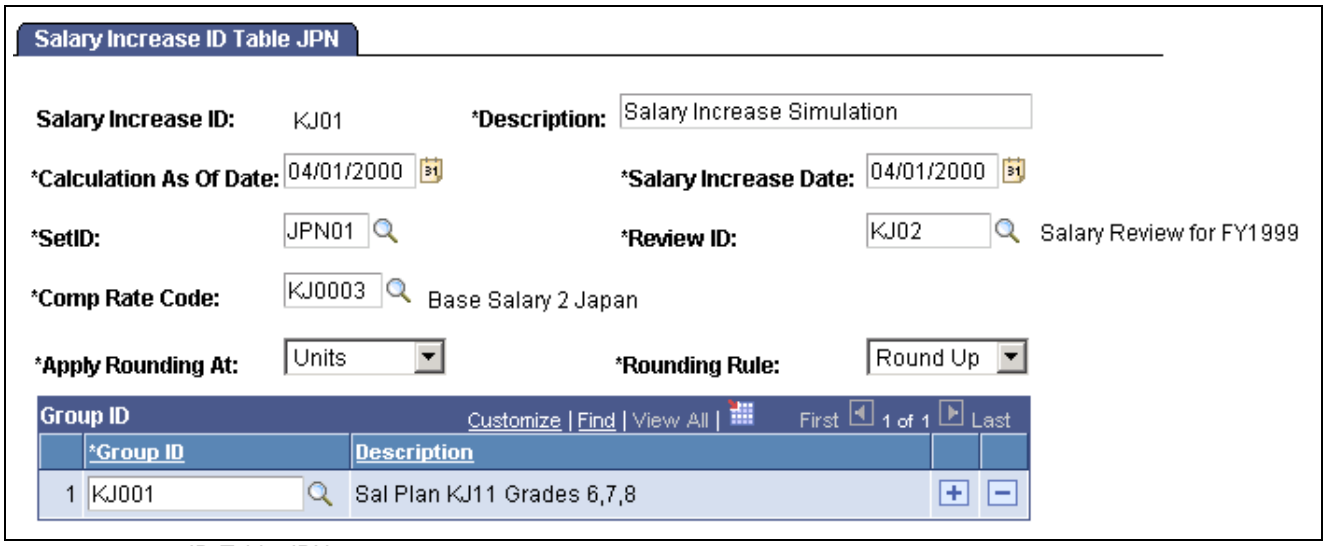
1. Define a Japanese salary increase ID.
2. Set up a Japanese salary increase matrix.
3. Run the Run Salary Inc Table process.
4. Run the salary increase simulation and adjust as required.
5. Run the load salary increase process.

## Pages Used to Update Salaries by Percentage

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Salary Increase ID Table JPN page | SALINC_ID_TBL_JPN | Compensation, Base Compensation, Percentage Increase JPN, Define Salary Increase ID | Define a salary increase ID and associate a rate code—which must be of class *DFRPAY* and of type *Flat Amount*—and worker groups with it. You run the salary increase simulation by salary increase ID. |
| Salary Increase Matrix Table JPN page | SALARY_MATRIX_JPN | Compensation, Base Compensation, 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 page | RUN_CMPCALC_JPN | Compensation, Base Compensation, 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 page | SALINC_SIML_JPN | Compensation, Base Compensation, 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 page | RUN_SALREPORT_JPN | Compensation, Base Compensation, 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 page | RUN_UP_SALINC_JPN | Compensation, Base Compensation, Percentage Increase JPN, Load Salary Increase | Update worker job compensation records with the results of the salary increase and adjustment results. |

## Defining Salary Increase IDs

Access the Salary Increase ID Table JPN page.



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 worker's current data to calculate new data. For example, if the worker's review band earns a worker 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 worker 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 worker's Job Data - Compensation record.

---

The process that populates the Salary Increase Simulation Table includes all workers 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 workers' job compensation record, those workers 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 workers being included in this process.

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

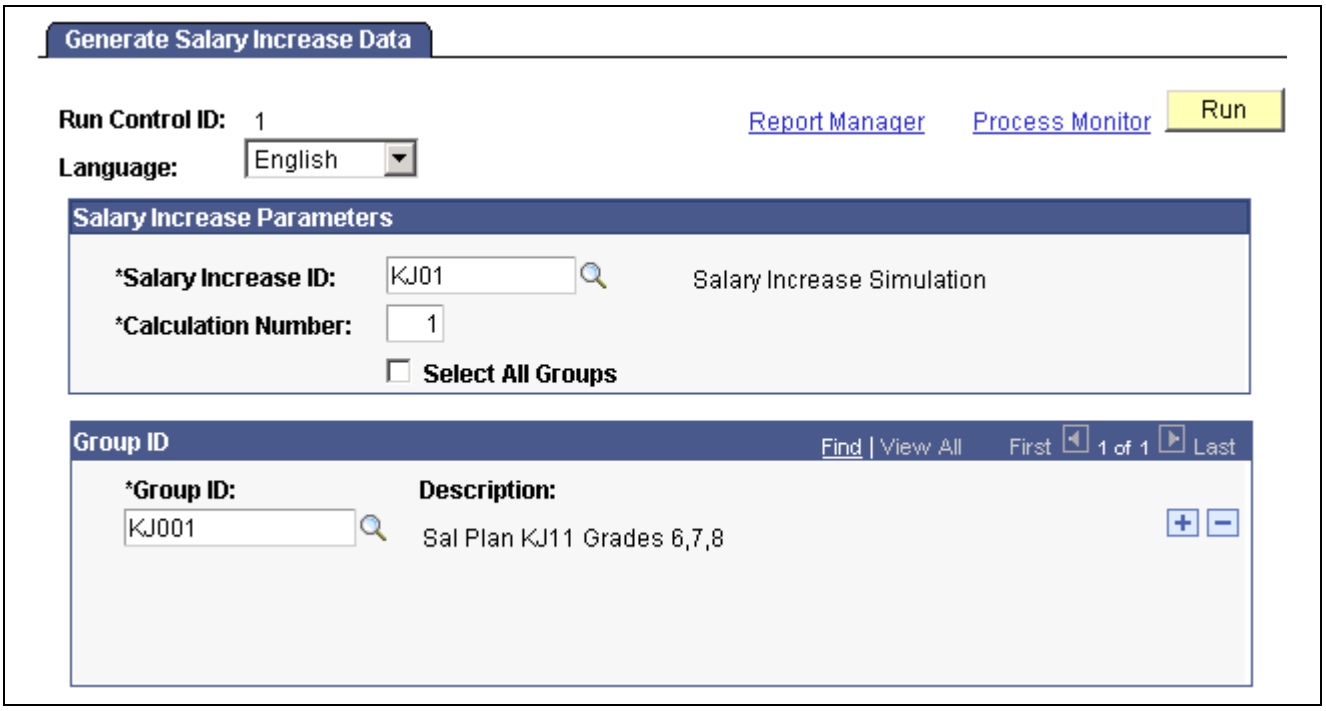
---

**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 workers 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.

**Name** and **EmplID** (employee ID) Enter this information for a single worker 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 worker ID or worker 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.

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

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

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

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

**Total Calculation Incr Amount** (total calculation increase amount) (5) The total of the Amount of Salary Increase column (Amounts) (or 1 × 3).

**Total Actual Increase Amount** (6) The Total Calculation Incr (increase) Amount plus Total Adjustment Amount (or 5 + 2).

**Total Calculation New Amount** (7) The total of the New Salary Amount column (Adjustments) (or 1 + 5).

**Total Actual New Amount** (8) The total of the Adjusted Salary Amount column (Adjustments) (or 7 + 2).

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

### Salary Details tab

**EmplID** (employee ID) Displays the IDs of all the workers in the group that you entered to access this page. You can have the display sorted by this first column. The worker ID is repeated on all the pages of this component.

**Name** Displays the names of all the workers in the group that you entered to access this page. You can have the display sorted by this second column.

**Empl Rcd Nbr** (employment record number) Displays each employment record number if it isn't *0.* Blank = record number *0,* meaning that the worker has only one employment record.

**Comp Rate Code** (compensation rate code) The compensation rate code associated with this salary increase ID.

**Compensation Eff Sequence** (compensation effective sequence) Displays the compensation effective sequence that comes from the worker's compensation record on the Job record.

### Amounts tab

**Amount Before Salary Increase** The worker's salary before the simulation was run.

**Review Band** Displays the review band that the worker's review results indicate. The salary increases come from the increase percentages that you linked to review bands in the Salary Increase Matrix Table.

**Salary Increase Percent** The increase in salary, expressed as a percentage of the Amount Before Salary Increase.

**Amount of Salary Increase** The amount by which the Amount Before Salary Increase is increased as a result of running the salary increase process.

### Adjustments tab

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

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

---

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

---

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

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

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

## Running the Salary Simulation Report

Access the 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.

**Salary Increase ID** Enter the salary increase ID for which you ran the simulation and for which the results are to be loaded to worker 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 11

# (FRA) Forecasting Salaries for France

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

- Define periods.
- Set up events.
- Define scenarios.
- Forecast compensation.
- Purge scenario history.
- View scenario history.

## 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 workers 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 workers 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 Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "PeopleSoft Application Fundamentals for HRMS Reports," PeopleSoft HRMS Reports: Selected 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 worker 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 groups of workers using Population Management.

   Population management is the method of choice for establishing worker hierarchies of groups within Base Compensation.

   **Note.** Population management does not use the same procedure for approval that is associated with Group Build.
5. Define the various events that you want to apply to the worker 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 proration rules or specific hours rate.
6. Ensure all events for one scenario have the same elementary period.
7. Define your proration rules (optional).
8. Define your rates for hours worked (optional).
9. Group together events into a scenario.

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

### See Also

Chapter 11, "(FRA) Forecasting Salaries for France," Understanding Technical Details, page 178

# Understanding Technical Details

This section provides an overview of technical details for:

- Compensation effects.
- Categorization of events.

## 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 subgroup 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 | | | | | | | | * | * | | |
| 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 | | | | | * | | * | | | | |

# 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

**Periods or Periods of Comparison**

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

**Reference Period**

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

**Analysis Period**

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

**Elementary Period Types**

This is how often the module processes its calculations.

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

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

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

Select the elementary period type when you define events.

**Elementary Periods**

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

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

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

**Triggering Period**

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

**Working Periods**

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

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

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

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

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

**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:

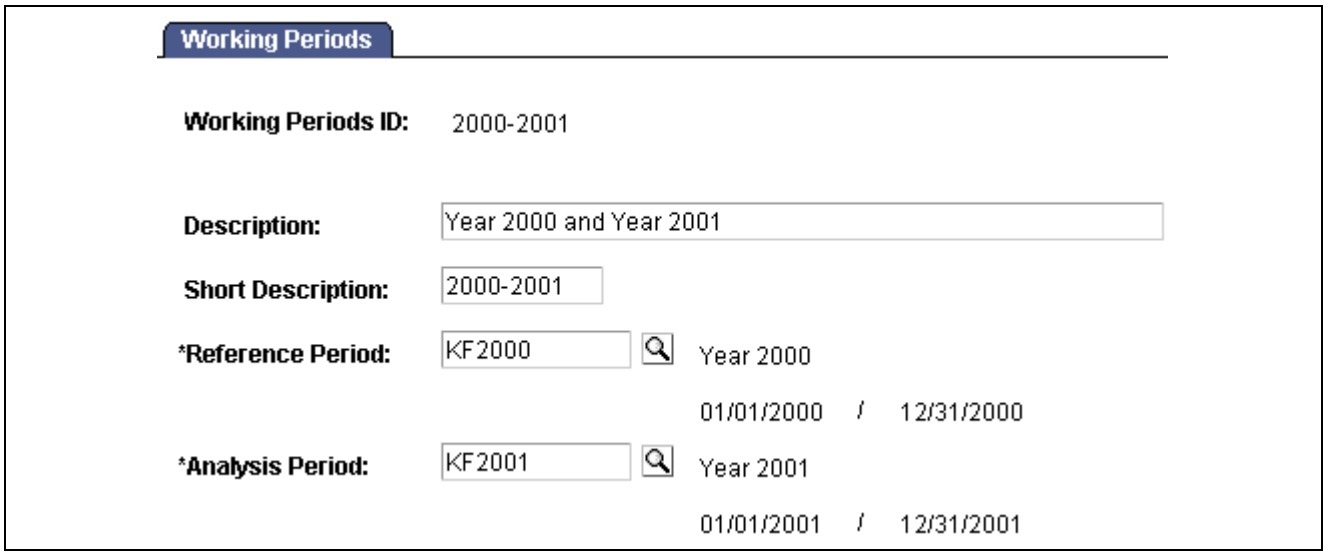
- Define periods and assign them a period type.
- Associate contiguous time periods for analysis or forecasting.

## 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 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 workers. 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 workers 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 workers 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 workers.
- Set up proration rules.
- Define overtime rates.

### See Also

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Variable Compensation*

## Pages Used to Set Up Events

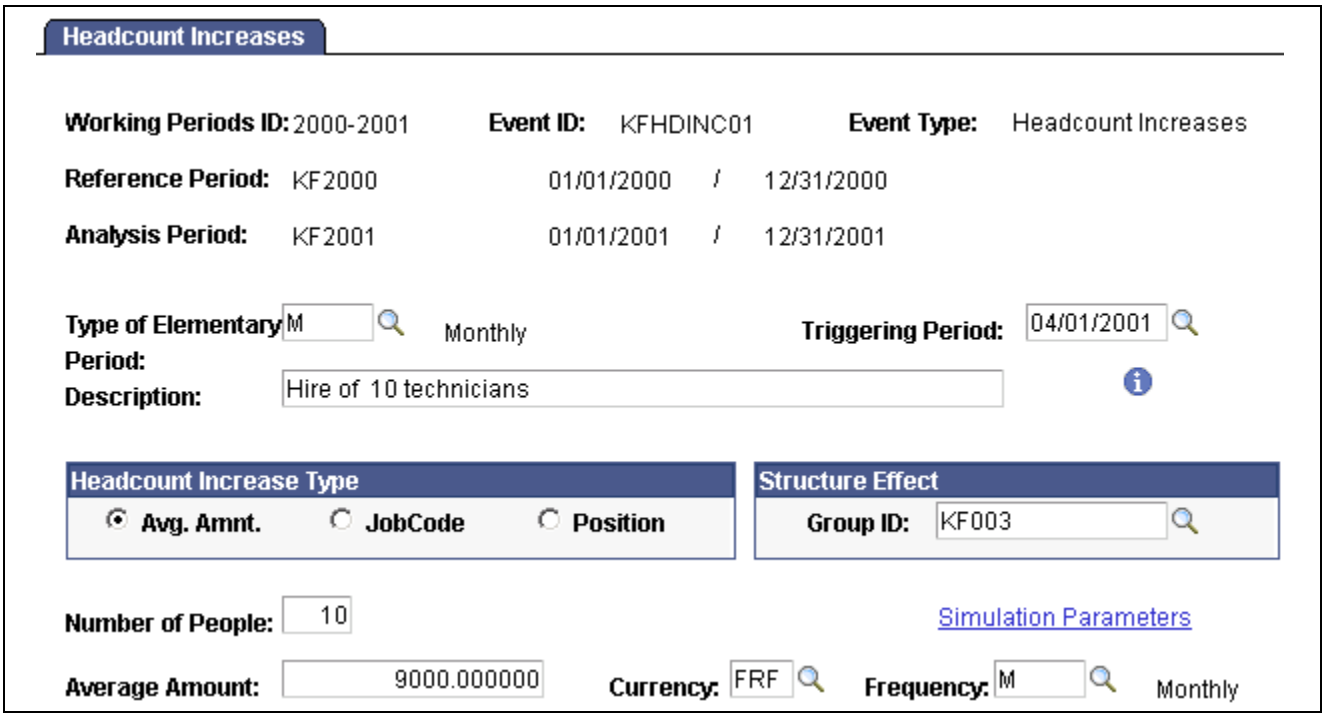
| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Headcount Increases | LMS_ENTRIES | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount increase setup panel<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Headcount Increases | Define 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 | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Incentive event setup panel<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Incentives | Set up a future award for a group. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Compensation Increase | LMS_INCREASE | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Salary Increase event setup<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Compensation Increases | Define a compensation increase event. |
| Headcount Decrease | LMS_LEAVES | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Headcount decrease event setup<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Headcount Decreases | Define a headcount decrease event. |
| Promotions | LMS_PROMOTION | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Promotion event setup panel<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Promotions | Simulate promotions for all people in a group. |
| Seniority | LMS_SENIORITY | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Seniority Setup panel<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Seniority | Define a seniority event. |
| Working Schedule | LMS_WRK_SCHEDULE | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Working Schedule event setup<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Working Schedules | 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 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.

**Note.** Only those job codes that are not associated with a matrix are available.

Position: Select this and the Forecasted Positions field appears. The calculation uses the compensation package defined for the job code associated

with the specified position and multiplies it by the number of people selected for the simulation.

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

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

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

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

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

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

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

The values come from the Frequency Table.

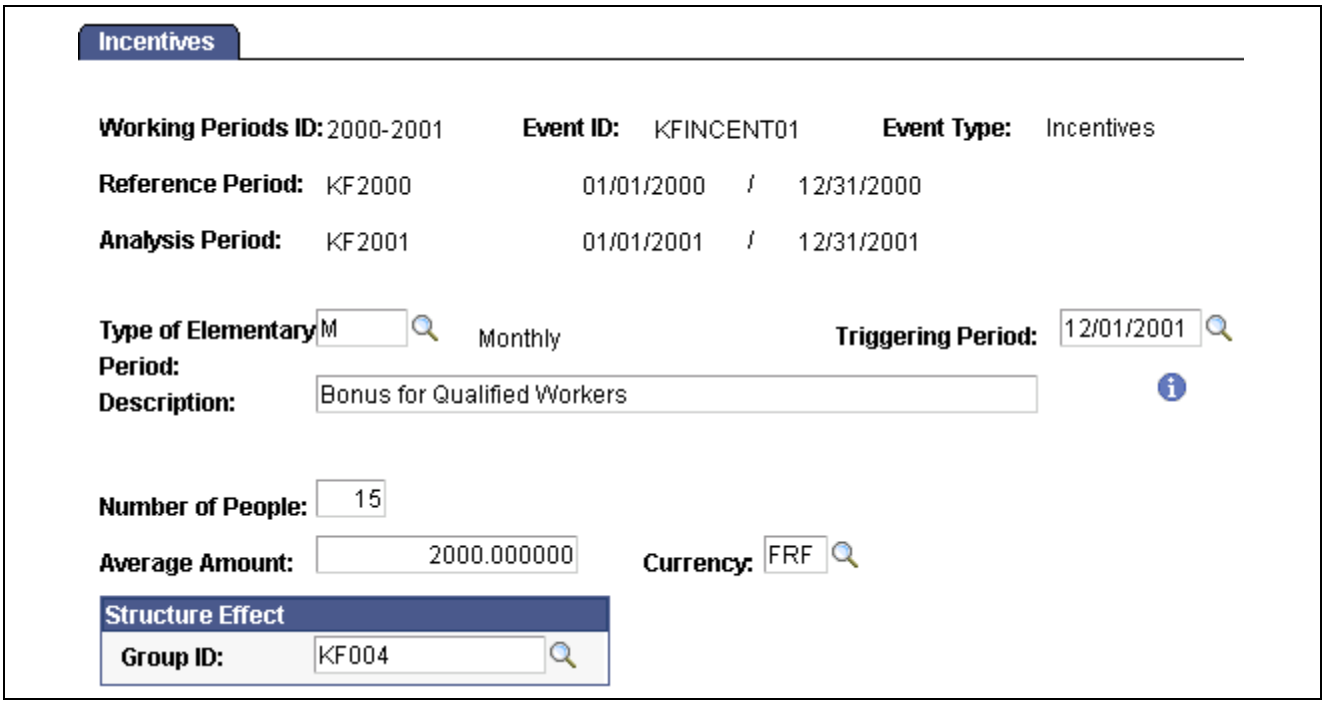
**SetID** When Headcount Increase Type is JobCode, specify the setID for the job code for the new hires. Values come from the SetID Table.

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

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

## Simulating Future Awards

Access the Incentives page.




Incentives page

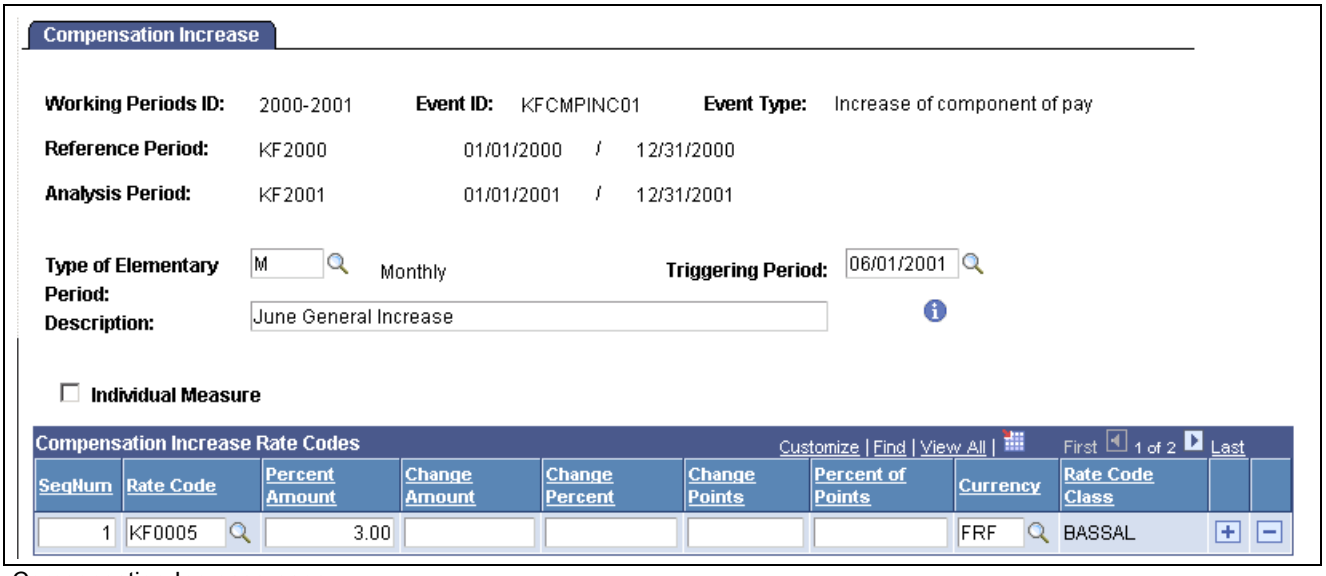
**Number of People** Enter the number of people who receive a lump sum incentive award.

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

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

# Simulating a Compensation Increase Event

Access the Compensation Increase page.




Compensation Increase page

**Individual Measure**

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

To simulate general increases, clear this check box.

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

**Compensation Increase Rate Codes**

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

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

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

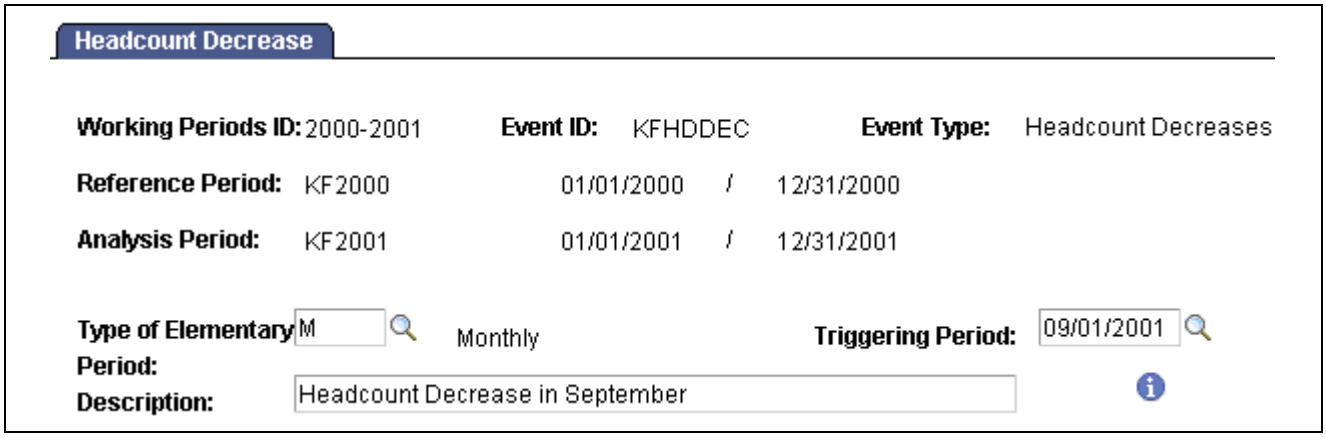
If the component type is flat amount or hourly, enter either the Percent Amount or the Change amount fields.

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

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

## Simulating a Headcount Decrease

Access the Headcount Decrease page.




Headcount Decrease page

**Description**

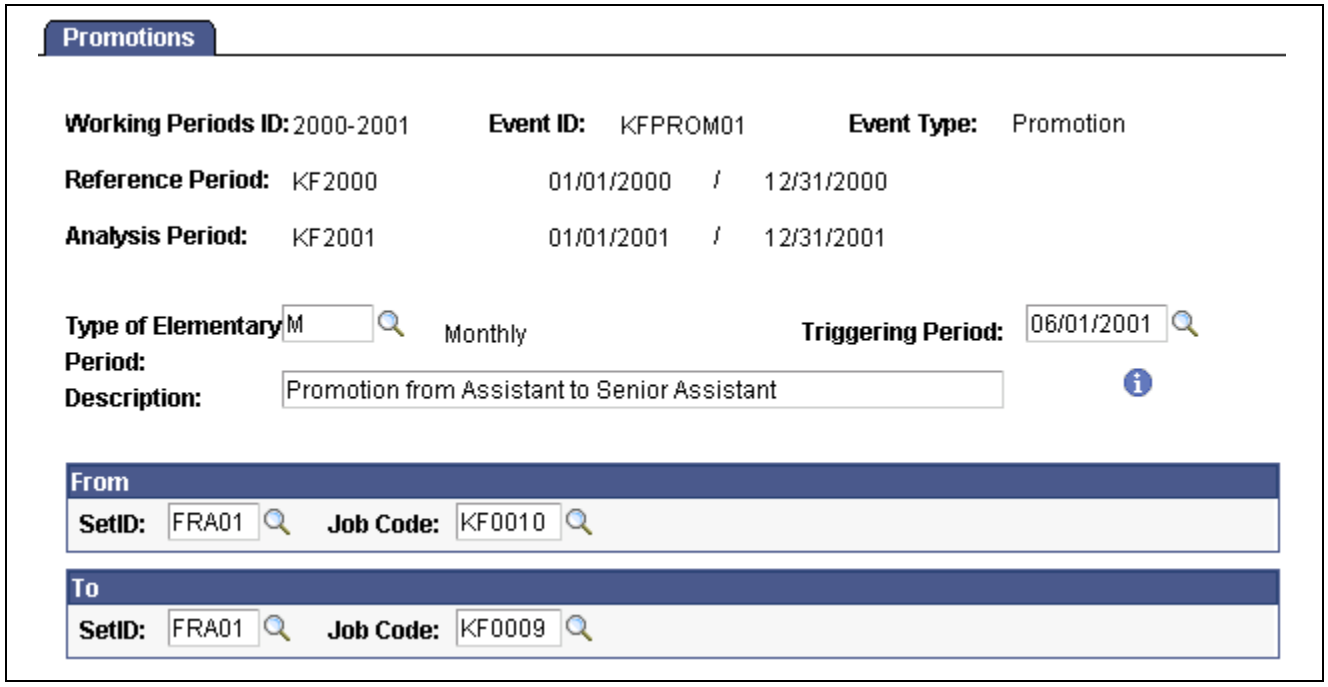
Enter a description of the headcount decrease event.

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

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

## Simulating a Promotion

Access the Promotions page.



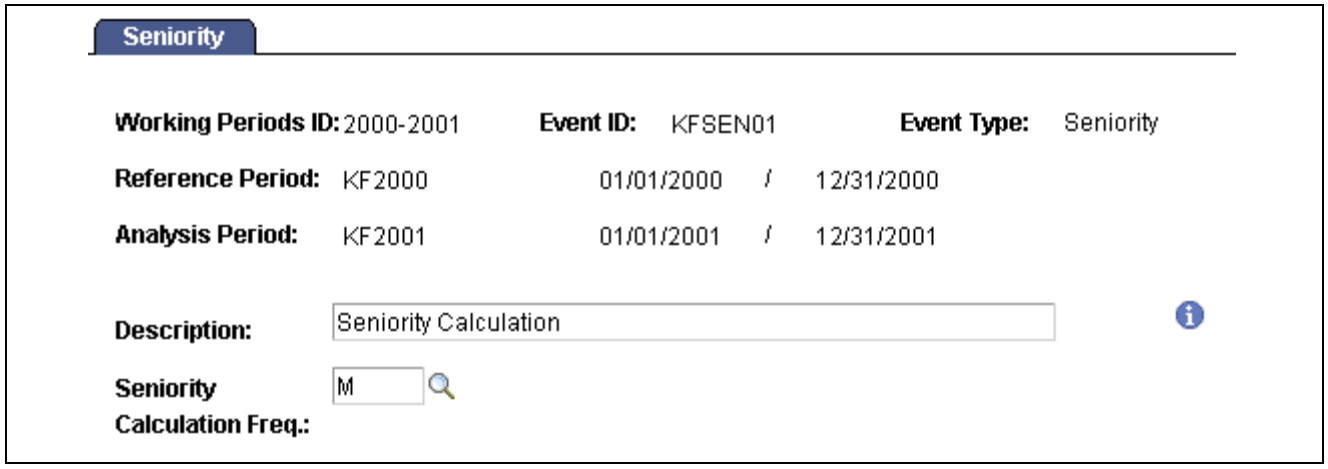

Promotions page

**From** Enter the SetID and Job Code of a group's current position.

**To** Enter the SetID and Job Code of a group's promoted position.

## Simulating Seniority

Access the Seniority page.




Seniority page

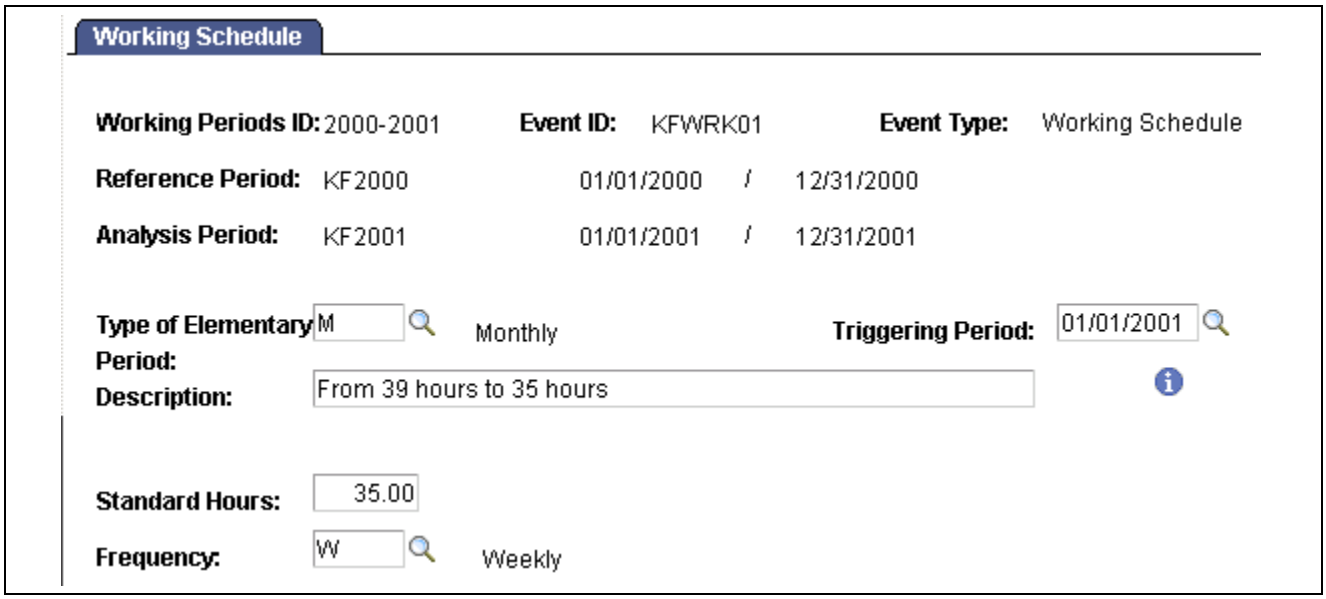
**Seniority Calculation Freq** (seniority calculation frequency)

Enter either *Monthly* or *Semi-monthly* for seniority pay.

At the event level, define the frequency of seniority calculation; that is, how often seniority is evaluated.

## Defining a Working Schedule

Access the Working Schedule page.




Working Schedule page

**Standard Hours**

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

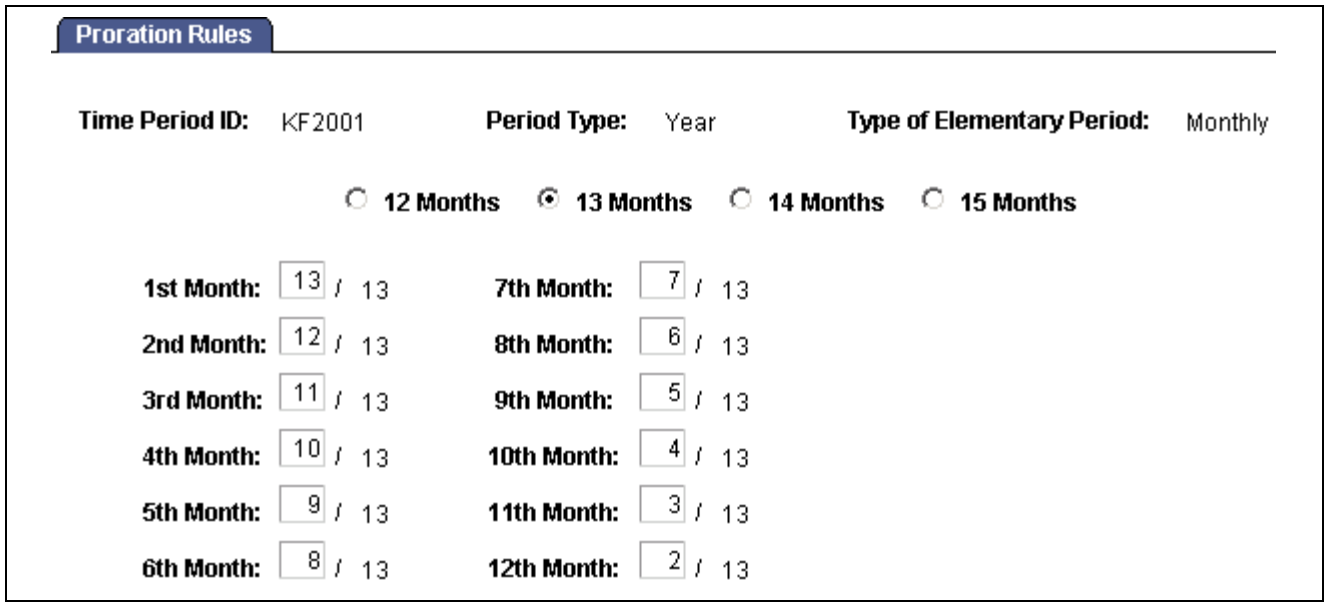
To simulate the impact of a group of people moving from 39 to 35 hours, enter here the target frequency (35 hours a week). The group of people who will change their working schedule is defined at the scenario level.

**Frequency**

Enter the frequency of the standard hours that you select.

## Defining Proration Rules

Access the Proration Rules page.



Proration Rules page

**Time Period ID** The Time Period ID that you entered appears.

**Period Type** A period type of either *Monthly* or *Semi-Monthly* appears.

**Type of Elementary Period** Depending on the combination of period type and type of elementary period that you selected, fields appear so that you can rate how to pay per elementary period.

**12 Months** Select to weigh each month equally.

**13 Months** Select to weigh one month out of a year twice.

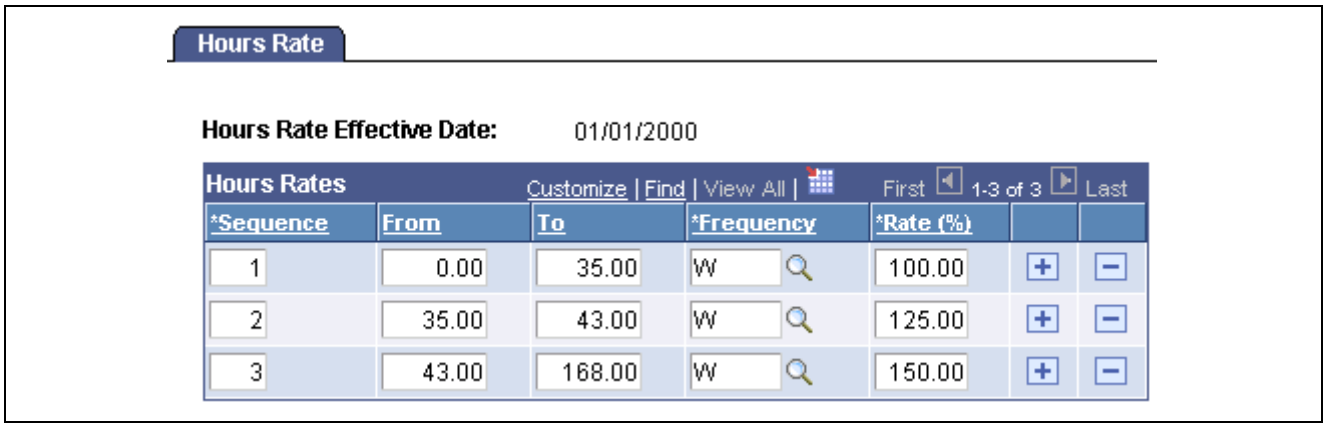
**14 Months** Select to weigh one month out of a year three times.

**15 Months** Select to weigh one month out of a year four times.

The system calculates all the ratios, but you can modify them. For instance, if you select 13 Months, you could weight December twice (default calculation) or half-weight June and December. In this case, you overwrite the defaulted ratios.

## Defining Hours Rates

Access the Hours Rate page.




Hours Rate page

**Hours Rate Effective Date** Enter the date these rates are effective.

**Sequence** These numbers represent the sequence of counting hours. They are automatically generated.

**From, To** Enter the first and last number in the range of hours. The first sequence must begin with *0*.

**Frequency** Enter the valid frequency for this range of hours.

**Rate (%)** Enter the rate in percent for each sequence.

# Defining Scenarios

In this section, we discuss how to:

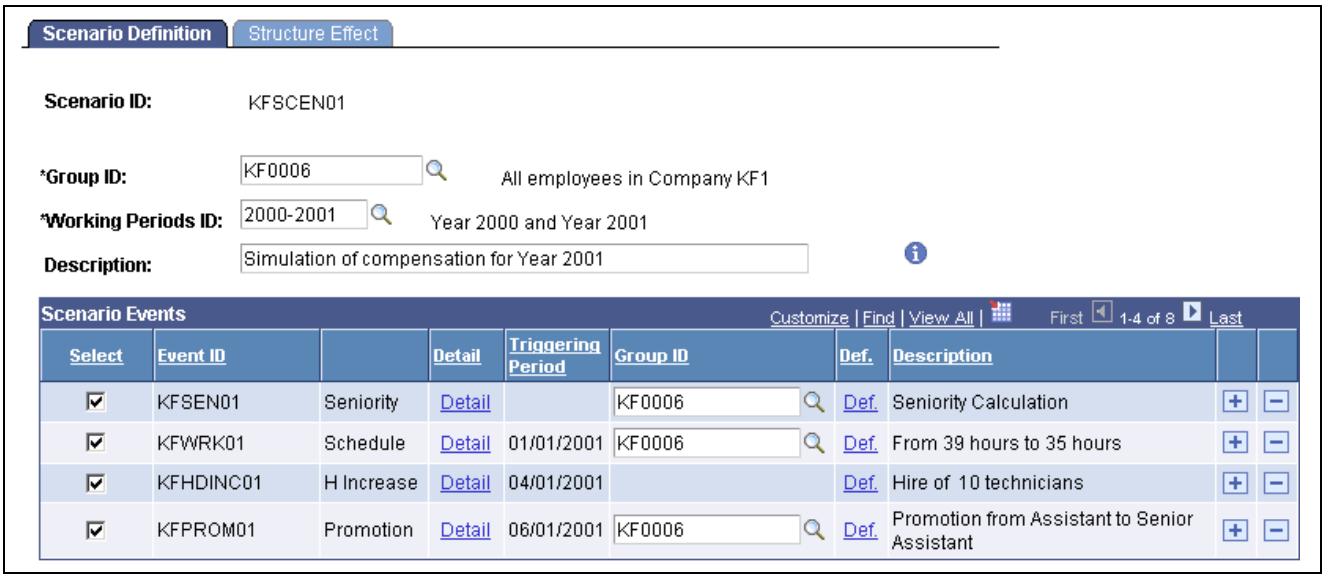
- Associate working periods, events, and worker groups.
- Assess the structure effect.

# Pages Used to Define Scenarios

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Scenario Definition | LMS_SCENARIO | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Scenarios | Define scenarios. You associate a working periods ID with a group and a set of events. |
| Structure Effect | LMS_SCENAR_CTG | • Set Up HRMS, Product Related, Compensation, Forecast Compensation FRA, Scenario setup panel<br>• Compensation, Forecast Compensation FRA, Define Forecast Data, Scenarios | Define the groups used to assess the Structure Effect. |

# Associating Events with a Scenario

Access the Scenario Definition page.




Scenario Definition page

**Group ID** Enter for this scenario. The group could be your whole organization. For calculation performance reasons, create a smaller group that represents your organization in compensation terms or create a group from a certain department.

**Working Periods Id** When you select a working periods ID and press TAB to move out of the field, the system displays all events applicable for that working periods ID.

Note that for certain events, you can limit the population for the event by selecting a Group ID.

Notice that Scenario *KFSCEN01* applies to all the workers in Group *KF0006.*

**Scenario Events**

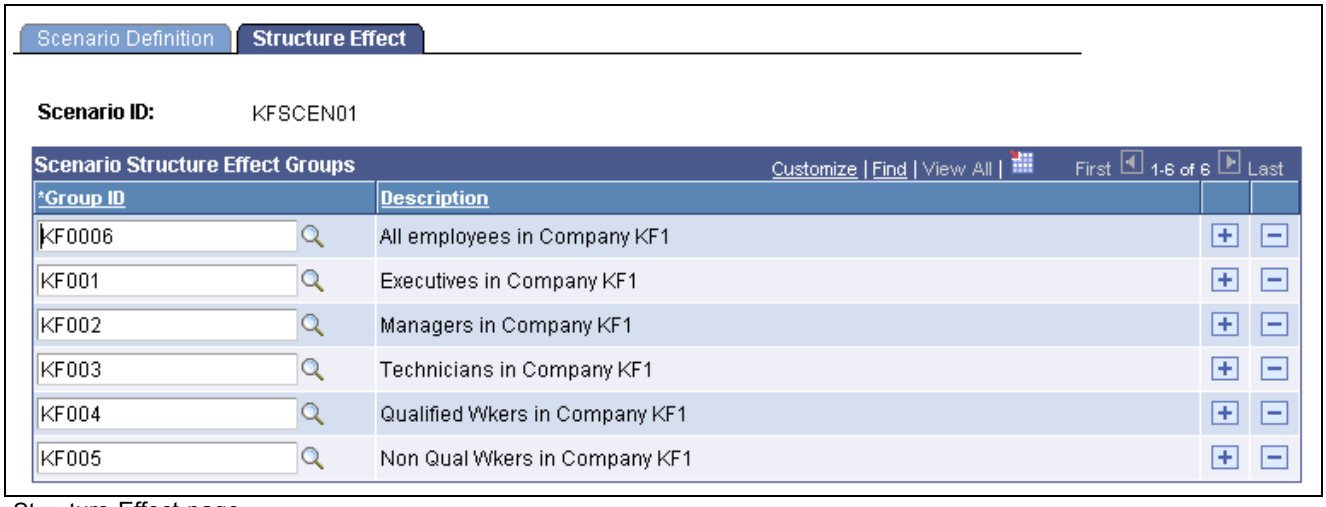
All the events defined for this working period ID appear. Each event is listed by Event ID, Triggering Period, and Description. To include the events in calculations, select the corresponding check box. Click Detail to go to the Event Definition page to make adjustments to an event. Click Def to go to 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 workers from the main group (the one defined in the Group ID field at the scenario level) who have, in their compensation package, the compensation rate codes defined in the event.

# Assessing the Structure Effect

Access the Structure Effect page.




Structure Effect page

**Scenario Structure Effect Groups**

Define a subgroup of your overall population, which you defined in the first Group ID field on the Scenario Definition page.

Enter groups forming a subset of your overall population. Ensure that the groups don't overlap and that the sum of their populations equals exactly the overall population.

For example, organization ABC, has several categories of workers: 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 workers 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 11, "(FRA) Forecasting Salaries for France," Technical Details: Compensation Effects, page 178

# 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 workers 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.

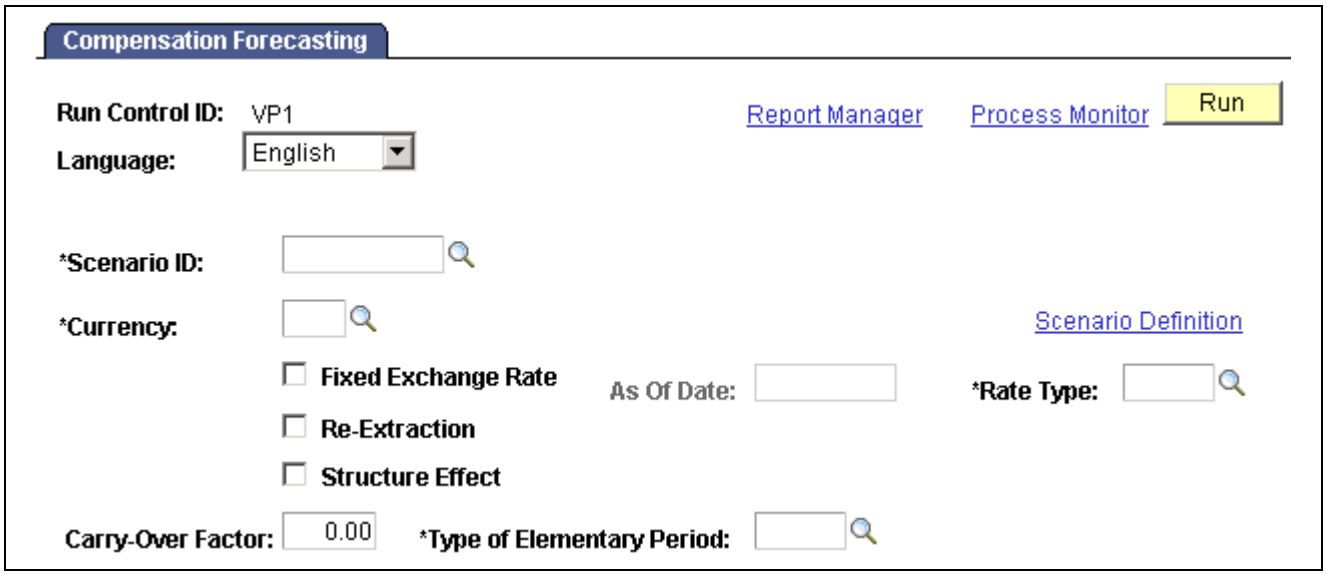
The forecasted compensation amounts are stored in salary forecasting tables so that you can compare the results of several scenarios. Remember that the salary forecasting process does not update core Human Resources transaction tables.

## 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

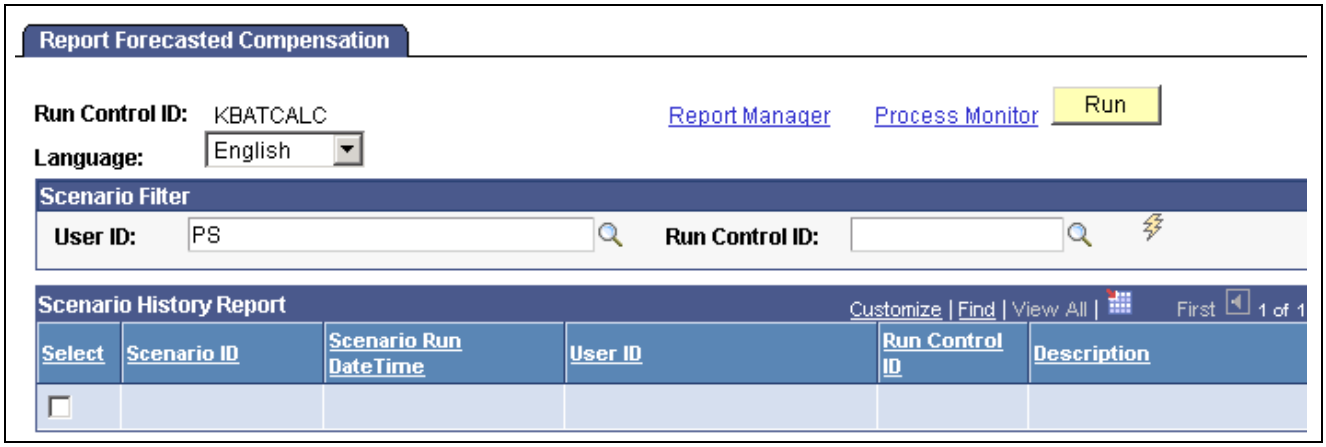



Compensation Forecasting page

| | |
|---|---|
| **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 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 11, "(FRA) Forecasting Salaries for France," Technical Details: Compensation Effects, page 178

## 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

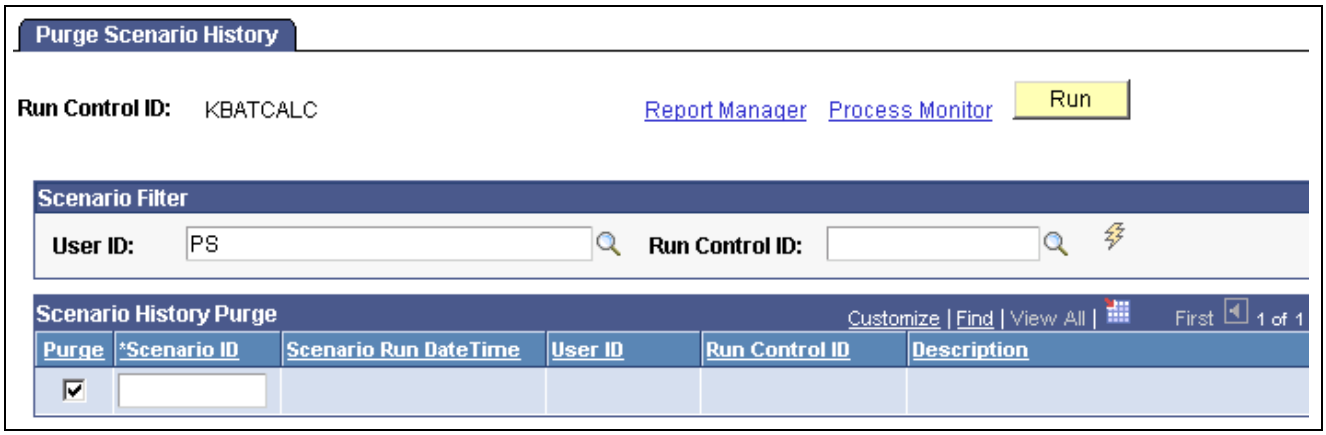
All the results from of the calculation of any scenario are stored in the database. Define several scenarios with different sets of events, run the calculation for all scenarios, and compare the results. Then select the scenario that best mirrors your compensation policy. You may then purge from the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

# CHAPTER 12

# Viewing and Reporting Summary Salary Data

This chapter provides an overview of summary salary data and discusses how to:

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

## Viewing Compensation History

This section discusses how to:

- View compensation history.
- View compensation rate codes.

### Understanding Compensation History

The Compensation History page shows the starting salary and all subsequent increases a worker 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.

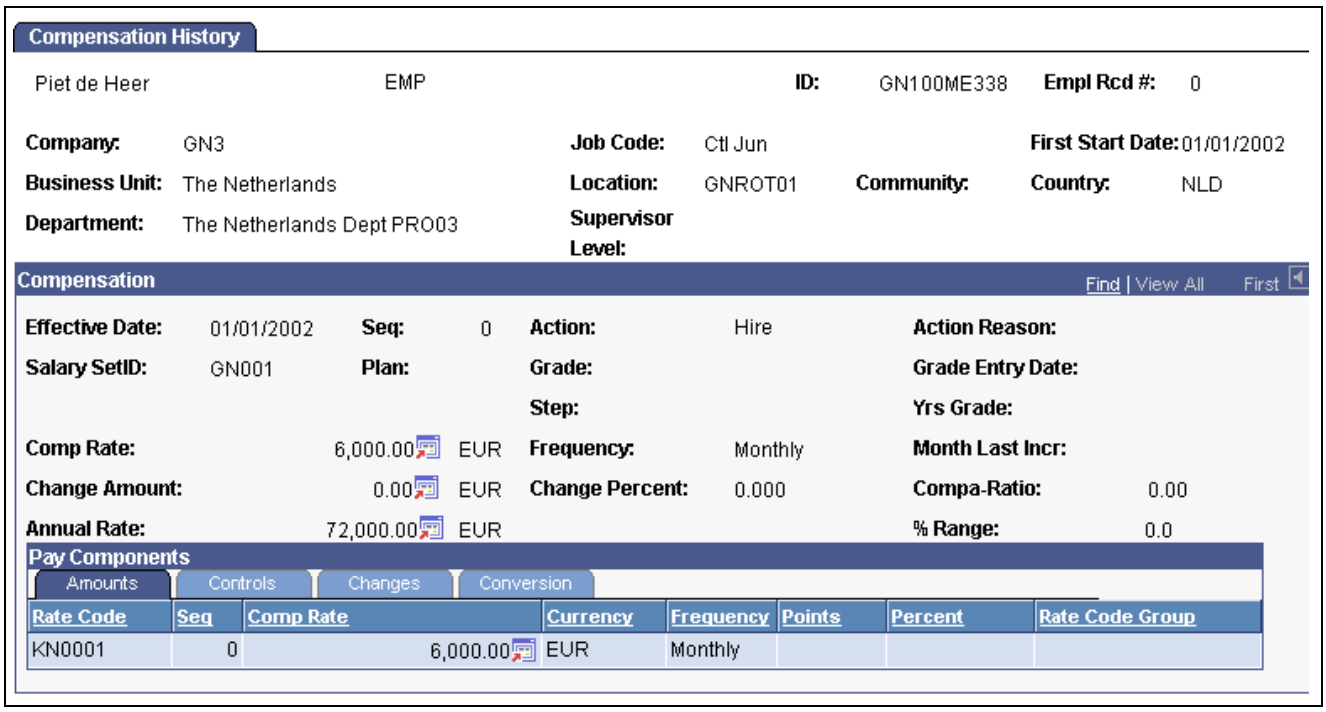
It shows the number of months since the worker's last increase, as well as how long the worker has been in a salary grade, as of today. The details by pay component appear in a grid at the bottom of the page.

### Pages Used to View Compensation History

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Compensation History | COMP_SUMMARY | Compensation, Base Compensation, Review Salary Information, Employee Compensation History | View the history of all pay rate changes the worker 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 page

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

**Month Last Increase**(number of months) — The number of months since the last increase.

**Seq** (sequence) — The sequence number of the salary change action.

**Action** and **Reason** — The action and reason that resulted in a salary change.

**Comp Rate** (compensation rate) and **Frequency** — The worker's compensation rate as of this effective date, sequence, action, and reason along with the frequency with which it is paid.

**Annual Rate** — The worker's new annual rate as of this effective date, sequence, action, and reason.

**Change Amount** — The amount of the worker's increase for this effective date, sequence, action, and reason.

**Change Percent** — The percent increase for this effective date, sequence, action, and reason.

**Plan, Grade,** and **Step** — The worker's salary administration plan, salary grade, and salary step for this effective date, sequence, action, and reason.

**Grade Entry Date** — The date the worker entered the grade.

**Compa Rto** (compa-ratio) — The worker'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 worker'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 worker has been in this grade.

### Pay Components

The Amounts, Changes, and Conversions tabs display detailed pay information.

### See Also

*PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Setting Up Administer Compensation," Defining Rate Codes

## Running Compensation Change Reports

To run compensation change reports, use the Salary History By Employee (RUNCTL_CMP011), Salary History by Group (RUNCTL_CMP014), Salary History by Company (RUN_PER023), Employee Compensation Changes (RUN_PER013), and Report Merit Increases (RUN_SP_MERIT_RPT) components.

This section discusses how to generate:

- Compensation history reports for a worker, group, or company.
- Lists of workers who have received compensation rate changes or merit increases within a specified period.
- Lists of workers 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, Base Compensation, Compensation Reports, Salary History By Employee | Print the Salary History by Employee report (CMP011). This report displays each salary change for a worker 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 by Group | RUNCTL_CMP014 | Compensation, Base Compensation, Compensation Reports, Salary History By Group | Run the Salary History by Group report (CMP014). This report provides the salary changes for the workers 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, Base Compensation, Compensation Reports, Salary History By Company | Run the Salary History for Company report (PER023) that displays each salary change for a worker during a specified time period. |
| EE Compensation Changes | RUNCTL_PER013 | Compensation, Base Compensation, Compensation Reports, Employee Compensation Changes | Run the Employee Compensation Changes report (PER013) that lists workers who have had compensation rate changes within a selected time period. |
| Report Merit Increases | RUNCTL_SP_MERIT | Compensation, Base Compensation, Merit Increases, Report Merit Increases | Run the Merit Increase report (PER041) that lists all workers who have received a merit increase during the period entered on the parameter page. |

## See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "PeopleSoft Application Fundamentals for HRMS Reports"

# Viewing Worker Ranking

To view worker ranking, use the Employee Ranking by Job Code (JOB_RANKING) and the Anonymous Ranking (JOB_RANKING_NO_EE) components.

This section discusses how to:

- View worker ranking in terms of compensation.
- View the details of worker compensation packages.
- View unidentified workers ranking in terms of compensation.

## Understanding Worker Ranking

The system provides two inquiry pages for viewing how workers rank in terms of compensation within a job code. Both pages group workers 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 workers in a job code are being paid equitably in each location.

- The Employee Ranking by Job Code page lists workers by name and worker 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 worker's compensation package.
- The Ranking by Job Code - No Name page lists worker compensation without displaying names and worker ID numbers to preserve privacy.

  The page sorts worker compensation by currency in descending order of salary amounts, and displays the location, annual rate, compa-ratio, and percent in range.

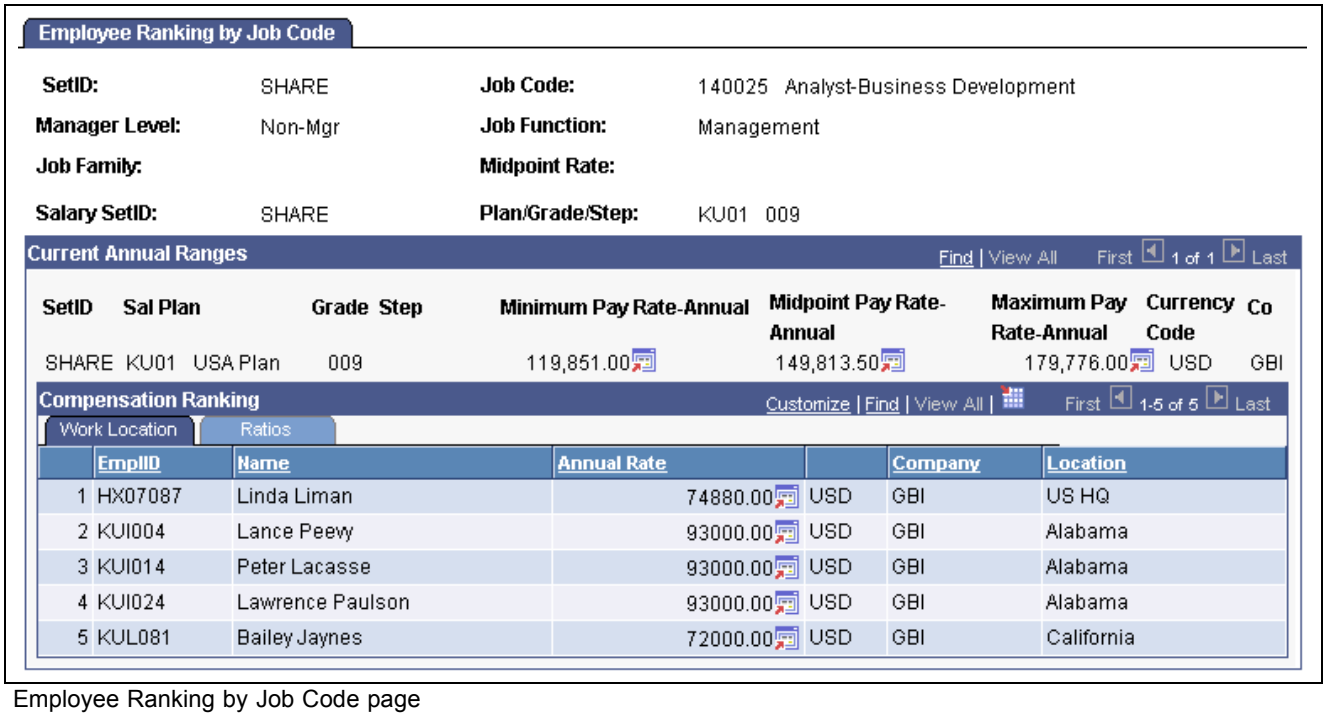
**Note.** The Manage Performance business process in PeopleSoft Human Resources also uses the Employee Ranking by Job Code and Ranking by Job Code - No Name pages.

# Pages Used to View Worker Ranking

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Employee Ranking by Job Code | JOB_RANKING | Compensation, Base Compensation, Review Salary Information, Employee Ranking by Job Code | View how workers 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: Ratios page. | View the details of the worker'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, Base Compensation, Review Salary Information, Anonymous Ranking | View how workers rank in terms of compensation within a job code. To protect privacy, worker identification does not appear on the page. |

# Viewing Worker Ranking in Terms of Compensation

Access the Employee Ranking by Job Code page.



Employee Ranking by Job Code page

**Min/Annual** (minimum annual) The minimum annual salary in the grade.

**Midpt/Annual** (midpoint annual) The midpoint annual salary in the grade.

**Max/Annual** (maximum annual) The maximum annual salary in the grade.

### Compensation Ranking

workers are listed from the highest compensation to the lowest.

### Ratios tab

**Compa-Ratio** Where workers' salaries lie in relation to the range midpoint for their salary grade.

**%Range** Where workers' salaries fall within the range for their salary grade.

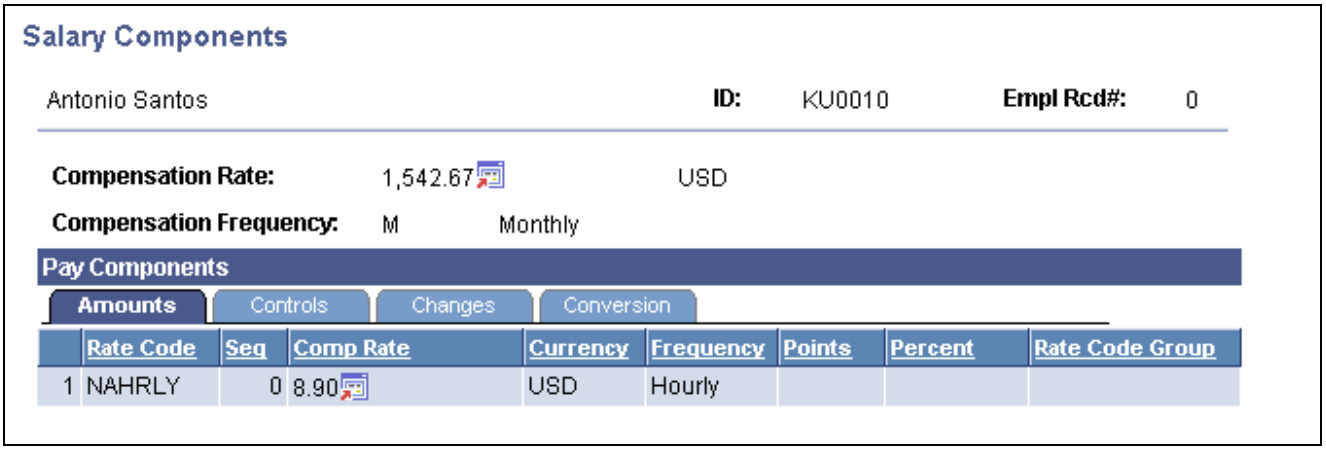
Click Component Details to access the Salary Components page, where you can view workers' compensation details by pay component.

### See Also

*PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Jobs," Classifying Jobs

## Viewing the Details of Worker Compensation Packages

Access the Salary Components page




Salary Components page

For each salary change, this page displays pay component details from the worker's job and compensation records.

### Common Page Information

**Compensation Rate** and **Comp Freq** (compensation frequency) The worker's annual compensation rate and compensation frequency.

### Pay Components

This section displays the details of the compensation package associated with the worker'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 worker'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

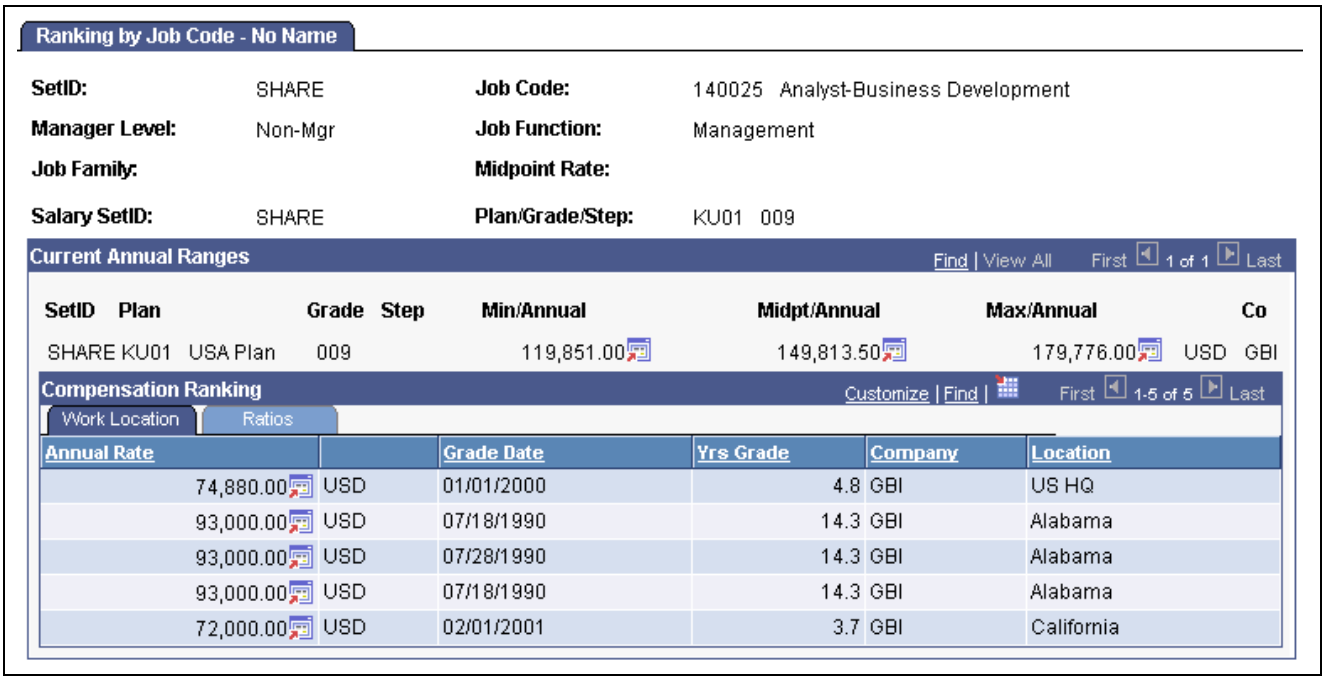
**Default Without Override**

**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 worker's compensation frequency and currency.

## Viewing Workers' Compensation Rank With Privacy Protected

Access the Ranking by Job Code - No Name page.




Ranking by Job Code - No Name page

All the fields on this page are identical to fields on the Employee Rank by Job Code page, except for the following fields:

**Grade Date** The date the worker entered the salary grade.

**Yrs Grade** (years in grade) The number of years the worker has been in the grade.

# Viewing Job Evaluations

This section discusses 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.

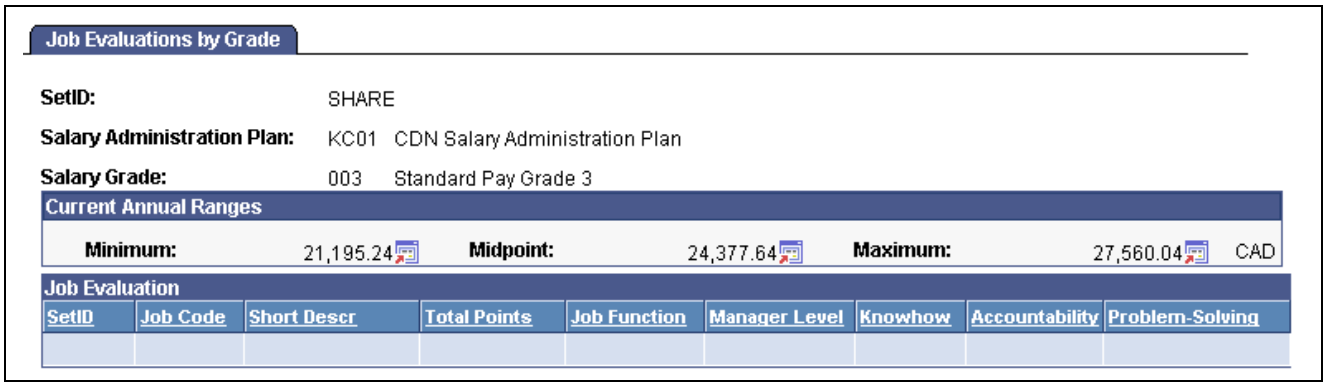
**Note.** The Manage Performance business process in PeopleSoft Human Resources also uses the Job Evaluation by Grade page.

# Pages Used to View Job Evaluations by Grade

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Job Evaluations by Grade | JOB_EVALUATIONS | Compensation, Base Compensation, 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, Base Compensation, 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 Evaulations by Grade page

## Current Annual Ranges

The system displays the following information about the salary grade, as you defined it on the Salary Grade Table page:

**Minimum, Midpoint,** and **Maximum** — Minimum, midpoint, and maximum annual compensation in the grade.

## Job Evaluation

**Total Points, Job Function,** and **Manager Level** — Enter the corresponding values associated with this job code.

**Knowhow, Accountability,** and **Problem-Solving** — Displays the number of points associated with this criterion for this job code.

# APPENDIX A

# Predefined Source IDs and Result IDs for Configurable Matrices

This appendix contains a list of predefined source IDs and result IDs that are delivered with PeopleSoft Human Resources Manage Base Compensation.

## Predefined Source IDs

This is a list of the predefined source IDs delivered as system data. Use these source IDS to define and maintain inputs used in configurable matrices.

| SOURCE_ID | SOURCE_TYPE_ID | Label | Description |
|---|---|---|---|
| COUNTRY | ADDRESS | Country | Country of Business Address |
| SENIORITY_DATE | DATES | Seniority Date | Seniority Date |
| ANNUAL_RATE | EMPINFO | Annual Rate | Annual Comp Rate |
| APPOINTMENT_TYPE | EMPINFO | Appt type | Appointment Type |
| BARGAINING_UNIT | EMPINFO | Unit | Bargaining Unit |
| BEN_STATUS | EMPINFO | Benefit Status | Benefit Status |
| BENEFIT_SYSTEM | EMPINFO | Benefit System | Benefit System |
| BUSINESS_UNIT | EMPINFO | Business Unit | Business Unit |
| COMPANY | EMPINFO | Company | Company |
| COMPRATE | EMPINFO | Base Rate | Base Compensation Rate |
| DEPARTMENT | EMPINFO | Department | Department of Employee |
| EEO_CLASS | EMPINFO | EEO Class | EEO Classification |
| EMPL_CLASSIFICATION | EMPINFO | Empl Class | Employee Classification |
| EMPL_CTG | EMPINFO | Empl Category | Employee Category |

| SOURCE_ID | SOURCE_TYPE_ID | Label | Description |
|---|---|---|---|
| EMPL_STATUS | EMPINFO | Payroll Status | Employee Payroll Status |
| EMPL_TYPE | EMPINFO | Employee Type | Employee Type |
| FLSA_STATUS | EMPINFO | FLSA Status | FLSA Status |
| GRADE | EMPINFO | Grade | Grade |
| JOBCODE | EMPINFO | Job Code | Job Code |
| LOCATION | EMPINFO | Location | Employee Location |
| PERSON_NAME | EMPINFO | Name | Person Name |
| SAL_ADMIN_PLAN | EMPINFO | Sal Admin Plan | Salary Administration Plan |
| STEP | EMPINFO | Sal Step | Salary Grade Step |
| UNION_CODE | EMPINFO | Union | Union Code |
| EMPL_GRD_MAXHRLY | EMPRELATED | GradeMaxHourly | Hourly Rate of Grade Maximum |
| MANAGER_LEVEL | EMPRELATED | Manager Level | Manager Level of Job |
| GEOGAREA | GEOGRAPHY | Geog Area | Geographical Area |
| POS_SUPV_LVL | POSITION | Pos Supr Level | Position Supervisor Level |
| PERFRATING | RATING | Perf Rating | Test Perf Rating |
| COMPA-RATIO | RATIOS | Compa-Ratio | Compa Ratio |
| JOB-RATIO | RATIOS | Job Ratio | Job Ratio |
| PERCENT_IN_RANGE | RATIOS | Pos in Range | Position in Range |
| GRD1STEP1_HRLY | STEPRATE | Grd1Step1_Hrly | Hourly Rate of Grade 1 Step 1 |
| COMPCODE | SUPPLIED | CompCode | Comp Code |
| CURRENCY | SUPPLIED | Currency | Currency Code |
| EMPLID | SUPPLIED | EmplID | Employee ID |
| SURVEY_JOB_CODE | SUPPLIED | Survey Job Code | Survey Job Code |
| SURVEY_PROVIDER | SUPPLIED | Survey Provider | Survey Provider |
| MONTHS_IN_COMPANY | TIMESPAN | MonthsofService | Months in Company |

# Predefined Result IDs

This is a list of the predefined result IDs delivered as system data. You can also create additional result IDs. Use these values to define outputs for configurable matrices.

| Result_ID | RESULT_TYPE_ID | Label | Description |
|---|---|---|---|
| AWARD | SIMPLECHAR | Award | Variable Comp Award |
| CURRENCY | SIMPLECHAR | Currency | Currency |
| PROVIDER | SIMPLECHAR | Provider | Survey Provider |
| PROVIDER_ DESCRIPTION | SIMPLECHAR | Provider Desc | Survey Provider Description |
| SALARY_SURVEY_ DEFAULT | SIMPLECHAR | Survey Defaul | Salary Survey Default |
| SOURCE_REFERENCE | SIMPLECHAR | Source Ref | Source Reference |
| SURVEY_JOBCODE | SIMPLECHAR | Survey Job Code | Survey Job Code |
| 10_PERC | SIMPLENUM | 10th Perc | 10th Percentile |
| 100_PERC | SIMPLENUM | 100th Percentil | 100th Percentile |
| 15_PERC | SIMPLENUM | 15 Perc | 15th Percentile |
| 16_6PERC | SIMPLENUM | 16.6 Prcntile | 16.6th Percentile |
| 20_PERC | SIMPLENUM | 20th Perc | 20th Percentile |
| 25_PERC | SIMPLENUM | 25th Percentile | 25th Percentile |
| 30_PERC | SIMPLENUM | 30th Percentile | 30th Percentile |
| 33_3PERC | SIMPLENUM | 33.3rd Prcntile | 33.3rd Percentile |
| 35_PERC | SIMPLENUM | 35th Percentile | 35th Percentile |
| 40_PERC | SIMPLENUM | 40th Percentile | 40th Percentile |
| 45_PERC | SIMPLENUM | 45th Percentile | 45th Percentile |
| 5_PERC | SIMPLENUM | 5th Perc | 5th Percentile |
| 50_PERC | SIMPLENUM | 50th Percentile | 50th Percentile |
| 55_PERC | SIMPLENUM | 55th Percentil | 55th Percentile |
| 60_PERC | SIMPLENUM | 60th Percentile | 60th Percentile |

| Result_ID | RESULT_TYPE_ID | Label | Description |
|---|---|---|---|
| 65_PERC | SIMPLENUM | 65th Percentile | 65th Percentile |
| 66_6PERC | SIMPLENUM | 66.6th Percntile | 66.6th Percentile |
| 70_PERC | SIMPLENUM | 70th Percentile | 70th Percentile |
| 75_PERC | SIMPLENUM | 75th Percentile | 75th Percentile |
| 80_PERC | SIMPLENUM | 80th Percentile | 80th Percentile |
| 83_3PERC | SIMPLENUM | 83.3rd Prcntile | 83.3rd Percentile |
| 85_PERC | SIMPLENUM | 85th Percentile | 85th Percentile |
| 90_PERC | SIMPLENUM | 90th Percentile | 90th Percentile |
| 95_PERC | SIMPLENUM | 95th Percentile | 95th Percentile |
| AMOUNT | SIMPLENUM | Amount | Compensation Amount |
| BASE | SIMPLENUM | Base | Base Compensation |
| BASE_MAXIMUM | SIMPLENUM | Base Maximum | Base Maximum |
| BASE_MEAN | SIMPLENUM | Base Mean | Base Mean |
| BASE_MEDIAN | SIMPLENUM | Base Median | Bease Median |
| BASE_MINIMUM | SIMPLENUM | Base Minimum | Base Minimum |
| BASE_MKT_ REFERENCE | SIMPLENUM | Base Mkt Ref | Base Market Reference |
| BONUS_PERCENT | SIMPLENUM | Bonus Percent | Bonus Percentage |
| DEFAULT_AMOUNT | SIMPLENUM | Default Amount | Default Comp Amount |
| DEFAULT_PERCENTAGE | SIMPLENUM | Default Percent | Default Percentage |
| DEFAULT_POINTS | SIMPLENUM | Default Points | Default Points |
| MAXIMUM_AMOUNT | SIMPLENUM | Max Amount | Maximum Amount |
| MAXIMUM_ PERCENTAGE | SIMPLENUM | Max Percentage | Maximum Percentage |
| MAXIMUM_POINTS | SIMPLENUM | Max Points | Maximum Points |
| MEAN_BASE_RATE | SIMPLENUM | Mean Base Rate | Mean Base Rate |
| MEAN_TOTAL_ COMPENSATION | SIMPLENUM | Mean Total Comp | Mean Total Compensation |

| Result_ID | RESULT_TYPE_ID | Label | Description |
|---|---|---|---|
| MEDIAN_BASE_RATE | SIMPLENUM | Median Base Rat | Median Base Rate |
| MEDIAN_TOTAL_ COMPENSATION | SIMPLENUM | Med Total Comp | Median Total Compensation |
| MIDPOINT_RATE | SIMPLENUM | Midpoint Rate | Midpoint Rate - Base Comp |
| MINIMUM_AMOUNT | SIMPLENUM | Min Amount | Minimum Amount |
| MINIMUM_ PERCENTAGE | SIMPLENUM | Min Percent | Minimum Percentage |
| MINIMUM_POINTS | SIMPLENUM | Min Points | Minimum Points |
| MKT_SOURCE_ REFERENCE | SIMPLENUM | Mkt Source Ref | Market Source Reference |
| NEW_AMOUNT | SIMPLENUM | New Rate | New Compensation Rate Amount |
| NEW_POINTS | SIMPLENUM | Points | Compensation Rate Points |
| PERCENTAGE | SIMPLENUM | Percentage | Compensation Percentage |
| ROUNDING_ THRESHOLD | SIMPLENUM | Rounding Thresh | Rounding Threshold |
| SURVEY_SALARY | SIMPLENUM | Survey Salary | Survey Salary |
| TOTAL_ COMPENSATION | SIMPLENUM | Total Comp | Total Compensation |
| TOTAL_ COMPENSATION_REF | SIMPLENUM | Total Comp Ref | Total Compensation Reference |
| VARIABLE_MARKET_ REFERENCE | SIMPLENUM | Variable MktRef | Variable Market Reference |
| VARIABLE_MAXIMUM | SIMPLENUM | Variable Maximum | Variable Maximum |
| VARIABLE_MEAN | SIMPLENUM | Variable Mean | Variable Mean |
| VARIABLE_MEDIAN | SIMPLENUM | Variable Median | Variable Median |
| VARIABLE_MINIMUM | SIMPLENUM | Variable Minimum | Variable Minimum |
| VARIABLE_TARGET_ PCT_REFERENCE | SIMPLENUM | Var Tgt Pct Ref | Variable Target Pct Reference |
| VARIABLE_TARGET_ PERCENT | SIMPLENUM | Variable TgtPct | Variable Target Percent |
| SURVEY_DATE | SIMPLEDATE | Survey Date | Survey Date |

| Result_ID | RESULT_TYPE_ID | Label | Description |
|---|---|---|---|
| INCREMENT_AMOUNT | INCRBYAMT | Incr Amount | Increment Amount |
| INCREMENT_PERCENT | INCRBYAMT | Incr Percent | Increment Percent |
| PERCENT_TO_APPLY | PCNTOFBASE | Pct to Apply | Percent to Apply |
| ANNUAL_RATE_ SOURCE | SOURCE | Annual Rate Src | Annual Compensation Rate |
| EMPL_GRD_MAXHRLY | SOURCE | Annual Rate Src | Annual Compensation Rate |
| THRESHOLD | THRESHOLD | Threshold | Threshold |

# Glossary of PeopleSoft Terms

| | |
|---|---|
| **absence entitlement** | 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. |
| **absence take** | This element defines the conditions that must be met before a payee is entitled to take paid time off. |
| **academic career** | In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on). |
| **academic institution** | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes. |
| **academic organization** | In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division. |
| **academic plan** | In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career. |
| **academic program** | In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates. |
| **accounting class** | 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. |
| **accounting date** | 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. |
| **accounting split** | The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields. |
| **accumulator** | 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. |
| **action reason** | 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.

**action template** In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

**activity** In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

**address usage** In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

**adjustment calendar** In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

**administrative function** In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

**admit type** In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

**agreement** In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

**allocation rule** 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.

**alternate account** 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.

**analysis database** In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

**Application Messaging** PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

**AR specialist** Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

**arbitration plan** In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

**assessment rule** In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

**asset class** An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

**attribute/value pair** In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

**audience** In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

**authentication server** A server that is set up to verify users of the system.

**base time period** In PeopleSoft Business Planning, the lowest level time period in a calendar.

**benchmark job** In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

**billing career** In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

**bio bit or bio brief** In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

**book** In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

**branch** A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

**budgetary account only** 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."

**budget check** In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

**budget control** 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.

**budget period** 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.

**business activity** The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

**business event** In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

**business process** A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

**business task** The name of the specific function depicted in one of the business processes.

**business unit** A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

**buyer** In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

**campus** In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

**catalog item** 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. A catalog item can have one or more learning activities.

**catalog map** In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

**catalog partner** In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

**categorization** Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

**category** In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

**channel** In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

**ChartField** 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.

**ChartField balancing** You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

**ChartField combination edit** The process of editing journal lines for valid ChartField combinations based on user-defined rules.

**ChartKey** 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.

**checkbook** In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

**checklist code** In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

**class** In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

**Class ChartField** 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 *sub-classification.*

**clearance** In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

**clone** In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

**cohort** In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

**collection** 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.

**collection rule** In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

**comm key** See *communication key.*

**communication key** In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

**compensation object** 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.

**compensation structure** In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

**component interface** A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

**condition** In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

**configuration parameter catalog** 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.

**configuration plan** 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.

**constituents** In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

**content reference** 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.

**context** In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

**control table** Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

**cost profile** 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.

**cost row** A cost transaction and amount for a set of ChartFields.

**course** In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

**course share set** In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

**current learning** In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

**data acquisition** 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).

**data cube** In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

**data elements** 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.

**dataset** A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

**delivery method** In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

**delivery method type** In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

**detailed business process** A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

**dimension** In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

**directory information tree** In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

**division** In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

**document sequencing** A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

**dynamic detail tree** A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

**edit table** 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.

**effective date** 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.

**EIM ledger** Abbreviation for *Enterprise Incentive Management ledger.* 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.

**elimination set** In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

**entry event** In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

**equitization** In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

**equity item limit** In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

**event** A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

**event propagation process** 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.

**exception** In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

**exclusive pricing** In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

**fact** 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.

**financial aid term** In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

**forecast item** A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

**fund** In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

**gap** In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

**generic process type** 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.

**gift table** In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

**GL business unit** Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

**GL entry template** Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

**GL Interface process** Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

**group** In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

**incentive object** 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.

**incentive rule** 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.

**incur** In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

**initiative** In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

**inquiry access** In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

**institution** In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

**integration** A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

**integration point** An interface that a system uses to communicate with another PeopleSoft application or an external application.

**integration set** A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

**item** In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

**item shuffle** In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

**joint communication** In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

**keyword** In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

**KPI** An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

**LDIF file** Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

**learner group** In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

**learning components** In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

**learning environment** In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

**learning history** In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

**ledger mapping** 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 *rates*) 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.

**library section** 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.

**linked section** 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.

**linked variable** 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.

**LMS** Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

**load** In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

**local functionality** 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.

**location** 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 *1*—is the address you use most often and may be different from the main address.

**logistical task** In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

**market template** 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.

**mass change** In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

**match group** In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

**MCF server** Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

**merchandising activity** In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

**meta-SQL** Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

**metastring** Metastrings are special expressions included in SQL string literals. The metastrings, 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.

**multibook** In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

**multicurrency** The ability to process transactions in a currency other than the business unit's base currency.

**national allowance** In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

**need** In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

| | |
|---|---|
| | is based on the amount of financial need. The process of determining a student's need is called *need analysis.* |
| **node-oriented tree** | A tree that is based on a detail structure, but the detail values are not used. |
| **pagelet** | Each block of content on the home page 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. |
| **participant** | In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process. |
| **participant object** | Each participant object may be related to one or more compensation objects.<br>See also *compensation object.* |
| **partner** | A company that supplies products or services that are resold or purchased by the enterprise. |
| **pay cycle** | In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation. |
| **payment shuffle** | In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed. |
| **pending item** | In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted. |
| **PeopleCode** | PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed. |
| **PeopleCode event** | See *event.* |
| **PeopleSoft Pure Internet Architecture** | The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser. |
| **performance measurement** | 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. |
| **period context** | 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. |
| **person of interest** | A person about whom the organization maintains information but who is not part of the workforce. |
| **personal portfolio** | In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information. |
| **plan** | 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. |

**plan context** 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.

**plan template** 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.

**planned learning** In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

**planning instance** In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

**population** In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

**portal registry** 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.

**price list** In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

**price rule** In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

**price rule condition** In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

**price rule key** In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

**primacy number** In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

**primary name type** In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

**process category** In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

**process group** In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

**process definition** Process definitions define each run request.

**process instance** 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.

**process job** 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.

**process request** A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

**process run control** 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.

**product** A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

**product category** 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.

**product family** A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

**product line** The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

**programs** In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

**progress log** In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

**project transaction** In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

**promotion** In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

**prospects**

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

**publishing**

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

**rating components**

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

**record group**

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.

**record input VAT flag**

Abbreviation for *record input value-added tax flag.* 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.

**record output VAT flag**

Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

**recname**

The name of a record that is used to determine the associated field to match a value or set of values.

**recognition**

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

**reference data**

In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

**reference object**

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).

**reference transaction**

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.

**regional sourcing**

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

**relationship object** In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

**remote data source data** Data that is extracted from a separate database and migrated into the local database.

**REN server** Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

**requester** In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

**reversal indicator** In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

**role** 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.

**role user** 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.

**roll up** In a tree, to roll up is to total sums based on the information hierarchy.

**run control** 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.

**run control ID** A unique ID to associate each user with his or her own run control table entries.

**run-level context** 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.

**SCP SCBM XML message** Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

**search query** 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.

**search/match** In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

**seasonal address** In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

**section** 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.

**security event** In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

**serial genealogy** In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

**serial in production** In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

**service impact** In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

**service indicator** In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

**session** In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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.

**session template** 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.

**setup relationship** In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

**share driver expression** In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

**single signon** 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.

**source key process** In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

**source transaction** 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.

**speed key** See *communication key.*

**SpeedChart** 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.

**SpeedType** A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

**staging** A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

**standard letter code** In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

**statutory account** Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

**step** In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

**storage level** In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

**subcustomer qualifier** A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

**Summary ChartField** 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).

**summary ledger** 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.

**summary time period** In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

**summary tree** 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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

**syndicate** To distribute a production version of the enterprise catalog to partners.

**system function** In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

**TableSet** A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

**TableSet sharing** Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

**target currency** The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

**tax authority** In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

**template** 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.

**territory** In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

**third party** A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

**3C engine** Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

**3C group** Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

**TimeSpan** 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.

**trace usage** In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

**transaction allocation** 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.

**transaction state** 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.

**Translate table** 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.

**tree** 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.

**tuition lock** In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

**unclaimed transaction** 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.

**universal navigation header** 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.

**update access** In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

**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.

**VAT exception** Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

**VAT exempt** Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

**VAT exoneration** Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

**VAT suspension** Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

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

**work order** In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

**worker** A person who is part of the workforce; an employee or a contingent worker.

**workset** A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

**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.

**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.

**XML link** The XML Linking language enables you to insert elements into XML documents to create a links between resources.

**XML schema** An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

**XPI** Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

**yield by operation** In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

**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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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