
PeopleSoft Enterprise eCompensation Manager Desktop 9.1 PeopleBook

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PeopleSoft Enterprise eCompensation Manager Desktop Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft Enterprise Application fundamentals.
- 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 PeopleSoft Enterprise eCompensation Manager Desktop application.

PeopleSoft Enterprise Application Fundamentals

The *PeopleSoft Enterprise eCompensation Manager Desktop 9.1 PeopleBook* provides you with implementation and processing information for your PeopleSoft Enterprise eCompensation Manager Desktop system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise Applications across the PeopleSoft Enterprise 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 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Common Elements Used in This PeopleBook

Compensation Cycle	Compensation activity that is established for a specific period of time (for example, annual merit increase).
Salary Plan	Salary plans represent individual compensation programs such as merit increases, optional increases, bonuses, or incentive stock options and include specific qualifications and funding.
Variable Compensation	Business process that is set up in PeopleSoft Enterprise Human Resources. It enables you to create and manage multiple variable compensation plans. These plans can encompass everything from onetime ad hoc awards to stock options, bonus plans, non-cash incentives, holiday gifts, bonuses, and more.
Cycle Status	The status maintained on the Compensation Cycle definition. These high level values are used with compensation cycles: <i>Defined</i> , <i>Building</i> , <i>Built</i> , <i>Open</i> , and <i>Finalized</i> .

Group Node	Based on the tree hierarchy defined on your compensation cycle, employees are assigned to a specific node on the tree. This is referred to as the group node. For each group node, direct and indirect report funding information is maintained, as well as the employee proposals. In addition, role access is also assigned at the group node level to control who has the ability to submit, review, and confirm or approval of the proposals for that group.
Group Node Status	A status is maintained for each group node. These values are used for group nodes: <i>Calculated, In Progress, Submitted, Pushed Back, Confirmed, Ready to Load, Completed, and Completed with Errors.</i>
Employee Proposal Status	The system maintains a status for each employee proposal. These values are used with employee proposals: <i>Pending, Bypass, Load Error, and Processed.</i>
Access Role	A role assigned to an employee for a specific group node. The role controls the access and action that can be performed by the employee. These values are used with access roles: <i>Compensation Administrator, Submitter, Reviewer, and Confirmer.</i>
Compensation Administrator	Access role that manages and monitors the status of the compensation cycle.
Submitter	Access role assigned to a group node that enables an employee to enter proposals for salary changes and awards, then submit those changes to be confirmed or approved by the person with the Confirmer or AWE Approver role.
Reviewer	Access role assigned to a group node that enables an employee to review proposals. The system does not allow employees with the Reviewer role to change or submit proposals for a group node.
Confirmer	Access role assigned to a group node that enables an employee to confirm salary change and award proposals for a group node.
AWE Approver	If you are using the Approval Workflow Engine, this is the derived approver that is defined within that approval framework. It is <i>not</i> the same as the Confirmer access role that is assigned to a group node within the eCompensation Manager Desktop application.
Compensation Administrator	Access role defaulted to the root node of the tree hierarchy. The person having this role gives them the ability to review and monitor all group nodes. This access role also enables the person to update the group node status to <i>Ready to Load.</i>

Chapter 1

Getting Started with eCompensation Manager Desktop

This chapter provides an overview of eCompensation Manager Desktop transactions and discusses eCompensation Manager Desktop integration and implementation tasks.

eCompensation Manager Desktop Overview

eCompensation Manager Desktop provides these features:

- Compensation Cycles

Administrators can define compensation cycles for salary increases and variable compensation bonus plans, and decide how fields are displayed in manager self-service.

- Cycle Roles

Administrators can control access to specific compensation cycles by users that have manager and compensation administrator roles.

- Allocate Compensation

Managers can enter and submit changes to the proposed compensation amounts allocated to their direct reports.

- Approvals and Delegations Integration

eCompensation Manager Desktop provides approval and access role delegation transactions that can be implemented to allow an individual to specify a proxy to act on their behalf.

- Approve Compensation

After the manager submits their updated proposed compensation for their direct reports, the system routes it for approval. The levels of approval and the approvers are configured in the approval setup tables and listed on the Approval page.

- Compensation History

Managers can review or verify compensation history for employees.

- Total Compensation

Managers can view the total compensation for selected employees.

- Request Ad Hoc Salary Change

Managers can request a salary increase for an employee or group.

- Approve Ad Hoc Salary Change

After the manager completes the ad hoc salary request, it is routed for approval. The levels of approval and the approvers are set up in the approval setup tables and listed on the Approval page.

- View Ad Hoc Change Status

Managers can view the status of ad hoc salary change requests submitted in the Request Ad Hoc Salary Change transaction.

- Request Budgeted Salary Change

Managers can request or perform a merit increase for a group of employees, based on the salary increase budget approved by the appropriate departments.

- Approve Budgeted Salary Change

After the manager completes the salary change request, it is routed for approval. The levels of approval and approvers are set up in the approval setup tables and listed on the Approval page.

- View Budgeted Salary Change Status

Managers can view the status of all salary change requests submitted in the Salary Change for Groups with an Allocated Budget.

eCompensation Manager Desktop Integrations

eCompensation Manager Desktop integrates with PeopleSoft 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 are available to any PeopleSoft application that is set up to subscribe to the published messages. The eCompensation Manager Desktop business processes integrate with these PeopleSoft Enterprise applications:

- PeopleSoft Enterprise Human Resources.
- PeopleSoft Enterprise Stock Administration.
- PeopleSoft Enterprise ePerformance.
- PeopleSoft Enterprise Global Payroll.
- PeopleSoft Enterprise Payroll for North America.
- PeopleSoft Enterprise Payroll Interface.

In PeopleSoft Enterprise Human Resources, eCompensation integrates with ePerformance to drive funding based on performance achievements. This integration also enforces proposal guidelines.

Stock awards are given through the Variable Compensation business process. Because of this integration, stock awards are included with all other variable monetary and non-monetary awards for total variable compensation reporting and history. Stock Administration grants and administers stock awards after they are approved and received from HR as service operations. Both Stock Administration and Variable Compensation use the group build feature so that when groups are used, they are consistent between the two systems.

eCompensation Manager Desktop Implementation

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.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Chapter 2

Understanding Compensation Cycles

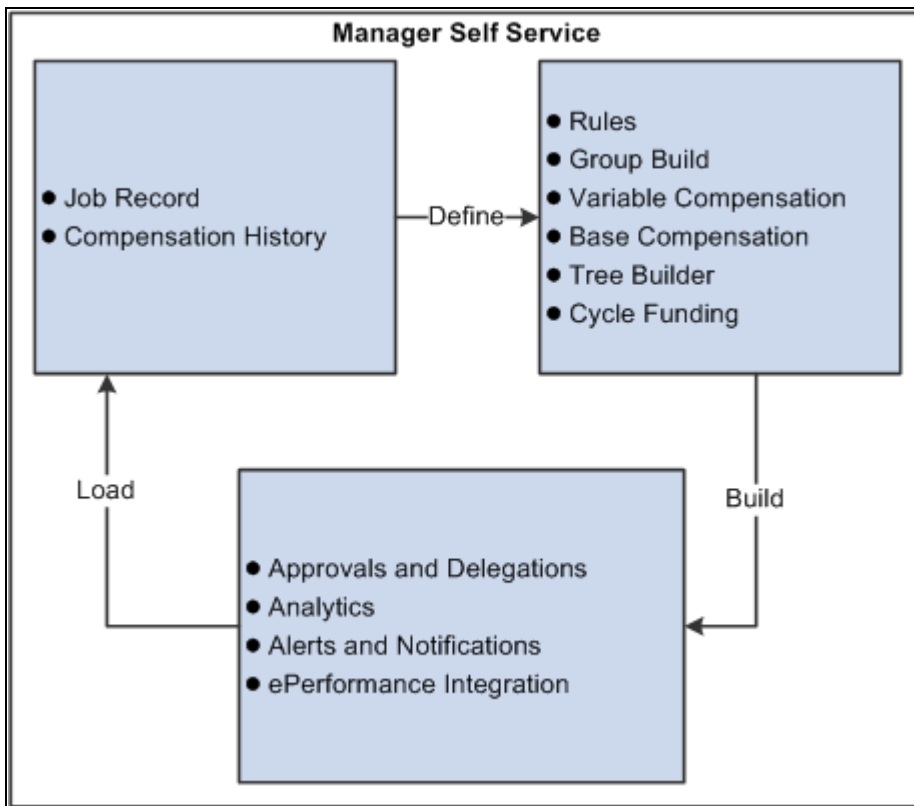
This chapter provides overviews on these topics:

- Compensation Cycles in eCompensation Manager Desktop.
- Salary Plans for Workforce Administration.
- Groups.
- Trees.
- Salary plans in compensation cycles.
- Configurable matrices.
- Variable compensation plans.
- Approval transaction configuration.
- Compensation cycles.
- Security considerations
- Compensation alerts.
- Document and link configuration.

Compensation Cycles in eCompensation Manager Desktop

Compensation Cycle is compensation activity that is established for a specific period of time (for example, the annual merit increase or bonus awards that are typically performed after the employee's annual performance evaluation).

This diagram illustrates, at a high level, the business process flow for implementing Compensation Cycles in eCompensation Manager Desktop:



Business process flow for implementing Compensation Cycles

Here is a brief summary of some of the steps that you may need to complete to set up and implement compensation cycles:

- Define base compensation.
- Define rules.
- Define Variable Compensation plans.
- Define or update trees.

Note. The Tree Definition is used to further breakdown your eligible population into groups that will be assigned role access (for example, Submitter, Reviewer, Confirmer, and so on) to enter and approve proposals.

- Define eligible compensation groups using PeopleSoft Group Build.
- Define cycle funding.
- Specify the approval and delegation process that will be used.
- Use summary analytics to review the compensation data contained in the cycle.
- Maintain alerts and notifications.

- Make sure ePerformance document types have been defined if the cycle is applying ePerformance integration (optional).

Note. eCompensation integrates with ePerformance to drive funding based on performance achievements. This integration also enforces proposal guidelines.

- Run the Load Awards and Salary Updates process.

Note. This process loads award updates back to the PeopleSoft Variable Compensation application and salary updates to the Job and Compensation History records of employees. The system applies the updates and integrates the information with payroll.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions," Setting Up Group Definitions

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions," Setting Up Group Security

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information," Updating Salary Information

Salary Plans for Workforce Administration

Salary plans represent individual compensation programs such as merit increases, optional increases, bonuses, or incentive stock options and include specific qualifications and funding.

Before you can use the eCompensation Manager Desktop 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.

Depending upon how your organization defines its salary structures, you may set up salary increase matrix guidelines on the Salary Increase Matrix Table page. Set up this table only if you use matrix guidelines in your organization to plan salary increases.

Define each salary plan with a unique ID on the Define Salary Plan page. For each salary grade, you may 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 this reason, you can access the same salary plan setup pages through the Workforce Administration menu.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps

Groups

The Group Build feature is the standard way to create groups of people in HRMS. This feature enables you to define specific criteria using various records and fields. For example, you can define group criteria using fields from tables like Job Data, Employment Data, and Compensation.

You could also define a group that includes everyone in departments 10200 through 10500, where the Compensation Rate Code is equal to *NAANNL*.

Eligible participants for a compensation cycle are primarily determined by the group ID that you specify on the Compensation Cycle Definition page.

The Compensation Cycle Build process calls the Group Build process for the group ID on your Compensation Cycle definition. For each employee returned by the Group Build process, the Compensation Cycle Build process prepares and calculates funding for the Salary and Variable Compensation plans that you have associated to your Compensation Cycle definition.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Trees

This section discusses:

- How trees are defined.
- When employees are not associated to trees.

How Trees are Defined

The PeopleSoft Enterprise eCompensation Manager Desktop application is providing a Tree Builder Utility that uses application classes to derive the organizational basis for the tree. To build a tree that is maintained in the Tree Manager application within PeopleTools, these components must be in place:

- An applicable tree structure definition.

This structure defines the type of content the tree contains and has references to a supporting record, page, and component where that content can be accessed.

- A page and component where the node content can be viewed or maintained.
- A record that can associate the node references (the keys) with the actual content items.

The two primary hierarchies that we recommend are supervisor and position. This requires a new tree structure with new supporting elements. A supervisor-based tree uses the supervisor ID on the Job record to determine who works for whom. The supervisor ID on the Job record captures only a reporting employee ID, but not the full job specification. The system attempts to resolve a manager's multiple jobs using alternate matching criteria.

These rules apply to both supervisor-based trees and position-based trees:

- All employees must belong to the same business unit.
- The employee's department must match the manager's department.
- The manager's department does not have to match the department of their manager.
- An employee can only be on a tree once unless they are a manager.
- A manager can only appear once on a branch.

The system uses a series of programs written to a standard interface to build the various hierarchies and navigational methods that are tied to the trees. Each program encapsulates the fixed supporting elements needed to expand a specific hierarchy's data model into a tree. The selection of a hierarchy method is a setup item on the Tree Builder Run Control page.

Once you create a tree using PeopleTools, do not change the tree structure. If you change the structure, you will not be able to use the existing run control or tree name to build additional trees. The system skips the steps used to build the new tree and displays a message if you change the structure and the tree has already been built.

Note. The PeopleSoft eCompensation Manager Desktop application can support the use of department trees. However, using department-based trees has some unexpected results that you should be aware of. For example, the manager of a department will also be listed with his or her own direct reports in a department-based tree structure. This causes issues when proposals are submitted and the higher level manager cannot enter proposals for the manager in the *submitted* node. Although the use of department-based trees is available, it is our recommendation that you use the supervisor or position based trees to administer compensation cycles.

See [Chapter 3, "Setting Up and Implementing Compensation Cycles," Building Trees, page 25.](#)

The Tree Builder Application Engine then instantiates the applicable class, whose primary function is the building of the tree. Since the indirect hierarchies specified by PeopleSoft HCM data models are not validated or enforced, the Tree Builder makes an attempt to navigate the hierarchy top-down and record the reporting relationships in the tree. Anyone (or any group) who lacks an appropriate relational linkage, or whose linkage is ambiguous, non-resolvable, or inactive, is omitted from the tree.

In this scenario the Tree Builder only provides assistance in turning a hierarchy into a tree. You must manually maintain and validate all subsequent tree maintenance within the PeopleTools Tree Manager application. The tree-building activity, if used, is entirely unrelated to and separate from the compensation cycle.

Note. Trees that have been created using Tree Builder should not be modified in such a way that the Tree Manager's structure is altered. These actions may cause unexpected results during the Cycle Build process. It is our recommendation that you create new trees and attach them to the compensation cycle.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager, Using PeopleSoft Tree Manager

When Employees are Not Associated to Trees

If an employee cannot be associated to any of the tree nodes based on the hierarchical basis value that is set by the user, the employee is placed into a default node called *Comp Admin Group*. For example there could be employees that have department IDs other than any of those found in the tree.

Because the selection criteria for the Tree Creation process and the Group Build process could be different, there is an implied connection via the hierarchical basis value.

The assumption is that the user is aware of the relationship between the two processes and has made efforts to ensure that they are both compatible. This may not always be the case, however:

- The selection criteria for the population may be too broad and pick up more employees than expected.
- The tree structure that has been defined may not have all of the appropriate nodes that were expected to be included.
- There is bad or incorrect data in either the organization or employee's attributes that causes a mismatch.
- The employee being processed resides at the root node of the tree

The Compensation Cycle Build process highlights these potential data anomalies by creating a special node and labeling it as a *Comp Admin Group*. This node is positioned so it reports directly to the root node. This enables the compensation administrator associated to the root node to view it as part of their setup and administrative activities.

For example, if the root node represented the president of the company, that person will then have access to update his or her own data. Therefore, the president is assigned to the *Comp Admin Group* and can be managed directly by the compensation administrator. The compensation administrator will have access to this node and will be able to determine if adjustments need to be made to the tree or if they will personally manage the employees that were placed in this node.

Salary Plans in Compensation Cycles

The compensation cycle in eCompensation Manager Desktop enables you to manage salary increases like annual merit increases and other forms of compensation.

On the Compensation Cycle Definition – Salary page you can define the salary plan parameters that will be used to calculate funding for salary increases. You can specify the funding percent, minimum and maximum percents allowed, and whether the funding amount calculated should be defaulted as the employee's proposed increase. You can also specify rounding and proration rules for your salary plan along with the increase date and action reason combination that the system will use when it applies the salary increase to the employee's Job and Compensation record.

For more complex funding calculations, you can implement a configurable matrix to derive the funding calculation based on factors like the employee's performance rating, salary plan, location, and department.

Configurable Matrices

This section discusses:

- How the configurable matrix is used.
- Matrix Types specific to eCompensation Manager Desktop.

How the Configurable Matrix is Used

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 are used as lookup variables and the outputs (or results) that the table returns for specific combinations of input values.

The guidelines that control a manager's salary actions are configured to support a wide range of business practices. Both base compensation and variable compensation may require flexibility in their funding, baseline, and validation rules. The configurable matrix is used to achieve this requirement. Within PeopleSoft eCompensation Manager Desktop, the Salary Increase Matrix is used for salary planning purposes.

Matrix Types Specific to eCompensation Manager Desktop

To avoid confusion with existing usage, PeopleSoft created these additional matrix types to support the salary plans associated with compensation cycles:

- BASECOMP - Base Compensation Adjustments
- VARCOMP - Variable Compensation Awards

For example, a Base Compensation Adjustments configurable matrix could have with inputs equal to the business unit source ID and outputs equal to the funding percentage, minimum percentage, and maximum percentage. In this example the output content could equal 4, 1, and 10 respectively.

In addition PeopleSoft has defined several new *simple* results. The system links the matrices into the cycle process through the eCompensation Cycle Plans setup table, which defines the salary plans included in the cycle. The system uses the matrices primarily during the Cycle Build process. During this process, the system produces the funding calculations.

The matrix is also used for validation of a manager's recommended entries against the minimum and maximum.

The system supports these result types and outputs:

<i>Result Type</i>	<i>Output Description</i>
BASECOMP	Funding Percentage
BASECOMP	Minimum Percentage

Result Type	Output Description
BASECOMP	Maximum Percentage
VARCOMP	Funding Amount
VARCOMP	Minimum Amount
VARCOMP	Maximum Amount

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices"

Variable Compensation Plans

The PeopleSoft Enterprise Human Resources Variable Compensation business process enables you to create and manage multiple variable compensation plans. These plans can encompass everything from onetime ad hoc awards to stock options, bonus plans, non-cash incentives, and holiday gifts or bonuses.

Variable Compensation plans can be simple or complex based upon prorated eligibility, goal levels, funding allocations, smoothing mechanisms, and approval processing.

You have the flexibility to create variable compensation plans that support your organization. To add a Variable Compensation plan, you must define a salary plan before you define your compensation cycle. The new Compensation Cycle functionality has not changed the configuration of Variable Compensations plans.

Using compensation cycles to adjust employee salaries can help you effectively manage your compensation information, adjusting employee salaries as changes are processed. Compensation cycles also involve other variable compensation awards.

On the Compensation Cycle Definition - Awards page you can associate a Variable Compensation plan to your Compensation Cycle definition. The system provides complete configuration and award calculations for PeopleSoft Variable Compensation.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation, "Setting Up Variable Compensation Plans"

[Chapter 5, "Administering Compensation Cycles," Administer the Cycle Process Flow, page 64](#)

Approval Transaction Configuration

This section discusses:

- Approval transactions.
- Route for approval events.
- Email templates.

Note. You can configure approval transactions, events, email templates, and registry using the Approval Workflow Engine (AWE) components and pages. If you use the AWE framework for approvals for the compensation cycle you must configure it for each cycle. Approval transactions, approval events, and email templates are configured at the cycle level and do not apply to all compensation cycles. The setup and configuration of AWE is not required, however. eCompensation Desktop Manager works as designed by providing a rollup submission of nodes that implement a form of implied approval. This rollup follows the access roles as they are defined in the system.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Approval Transactions

eCompensation Manager Desktop uses the Configure Transactions component to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions.

The events for which the system sends notifications include:

- Launch of the approval process on a transaction.
- Queue of approval step to an approver.
- Queue of a review step to a reviewer.
- Completion of the approval process.

Note. The launch of the approval process occurs when the compensation proposal for a group is submitted by a user when they click the Submit button.

Route for Approval Events

When the approval process is initiated, after submitting the compensation information for the cycle, the system evaluates the next step in the approval process. To route it to the next approver in line, you need to instantiate the Route for Approval event (select Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Configure Transactions).

Among the tasks that are completed internally with this event, some notifications need to be sent to the next approver in line to indicate that a request is waiting for approval.

PeopleSoft eCompensation Manager Desktop delivers a process ID (ApproveCompensationProposals), definition IDs, and email templates as part of the setup for Route for Approval.

Here is the Configure Transactions page that you would use to route approvals to requesters, approvers, and reviewers.

Configure Transactions

Process ID: ApproveCompensationProposals

Ad Hoc Approver Options

*Approval User Info View: WCS_APRV_USR_VW

Ad Hoc User List:

User Utilities

User Utilities Package: HCSC_USER_UTILITIES

User Utilities Path: UserUtilities

Events Find | View All First 1 of 3 Last

*Event: On Final Approval *Level: Header

Menu Name: ROLE_MANAGER

Approval Component: WCS_ECM_AWE_HOME

Page Name:

Menu Action: Update

SQL Object Identifier: WCS_APPR_EML_BIND

Notifications Customize | Find | View All First 1 of 1 Last

Main | Template Details | Frequency

	*Participant	Channel	User List	Template Name
1	Requester	Both		WCS_APPR_APPROVED

Configure Transactions page

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Configuring Approval Transactions.

Email Templates

Clicking the Submit button from the Manager Self-Service - Manage Cycle Transactions page launches the Approval Workflow Engine (AWE) and initiates the approval process. Workflow tables track who initiated the request and who is the next approver. The system also submits the compensation information for approval and triggers the respective email notifications that were setup in AWE.

Clicking the Submit button also sets the status of the cycle to *Submitted*. After a transaction has been submitted, a user cannot edit the transaction. An event can be resubmitted only if the approver denies the transaction or after the next approver in line has clicked the Push Back button to send it back to the requestor or originator.

If you setup the notification process within AWE, the original submitter receives an email notification. Recipients of notifications include requesters, approvers, and reviewers. These users can receive their notifications through either worklist entries or by email notification. The PeopleSoft Enterprise eCompensation Desktop Manager application provides several templates for specific AWE events that you can modify for your own specific use. To modify email templates select Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Generic Templates.

Here is the suggested text for the email template:

Field	Text
Subject	Your Compensation Recommendation was submitted
Message Text	<p>The following request has been submitted by %5. This request requires your approval before the compensation proposals can be confirmed.</p> <p>Submitted Request Cycle: %2</p> <p>Begin Date: %3</p> <p>Group: %4</p> <p>Please visit the following URL for detailed information about the request: %1</p> <p>This communication was sent via Oracle Workflow Technology. Please do not reply to this email.</p>
Template Variables	<p>%1 URL (provided by AWE)</p> <p>%2 Cycle</p> <p>%3 Begin Date</p> <p>%4 Group</p> <p>%5 Originator Name</p>

Note. AWE automatically creates the URL when the system sends the notification.

Here is an example of the Generic Template Definition page that you can use on the Configure Transaction page to route approvals to requesters, approvers, and reviewers:

Generic Template Definition
Blackberry Email Responses

Template: WCS_APPR_APPROVAL_REQ

***Description:**

Instructional Text:

Priority:

***Sender:** **Email ID:**

Subject:

Message Text:

Below is the list of available variables for this template.
 You can use template variables within your subject or message text.
 The following variables can also be used:
 %Date, %DateTime, %Time, %ServerTimeZone, %EmailAddress, %NotificationPriority,
 %NotificationToList, %NotificationCCList

Template Variables			
*Value	*Description		
<input type="text" value="%1"/>	<input type="text" value="URL (provided by AWE)"/>	+	-
<input type="text" value="%2"/>	<input type="text" value="Cycle"/>	+	-
<input type="text" value="%3"/>	<input type="text" value="Begin Date"/>	+	-
<input type="text" value="%4"/>	<input type="text" value="Group"/>	+	-
<input type="text" value="%5"/>	<input type="text" value="Originator Name"/>	+	-

Generic Template Definition page

Note. The eCompensation Manager Desktop application delivers the Compensation Pending Approval template (WCS_APPR_APPROVAL_REQ).

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Defining Notification Templates for Approvals.

Compensation Cycles

A compensation cycle defines the compensation activity and associated time period. The cycle ID and funding period are used as key fields throughout the process to identify unique cycles.

This section discusses:

- Administering the Compensation process.
- Cycle statuses.
- Group statuses.
- Proposal statuses.

Administering the Compensation Process

The administrative functions within eCompensation Manager Desktop's enable you to establish plans, define processes, and manage the compensation process for your organization. These functions encompass the activities that a compensation administrator would need to complete to configure the self-service component that managers use to review and enter compensation information.

Compensation administrators use these functions to configure the eCompensation Manager Desktop application:

- Compensation Cycle Definition

Use the pages within this component to define your compensation cycles and associated provisions for both salary and award processing. Here are the types of parameters that comprise a compensation cycle definition:

- What group of employees will be processed?
- What tree hierarchy will be used to group employees for processing and approvals?
- Will performance ratings be integrated into the Compensation Cycle process?
- What Salary Plan rules will be used to calculating funding and process salary increases?
 - Will a configurable matrix be used to derive the funding percentage?
 - What rounding rules will be in effect?
 - What proration rules will be in effect?
- What Variable Compensation rules will be used for calculating funding and processing bonuses and awards?
 - Will funding be defaulted from Variable Compensation or manually funded?
 - What rounding rules will be in effect?
- What specific fields of information need to be displayed on the Manager Self-Service pages?
- What type of approval process will be used?

- Cycle Administration

Use the pages within this component to manage the major events during a compensation cycle. This component provides the event steps and prompts for the activities that need to be completed throughout the compensation cycle. You can also use this component to build your compensation cycles to prepare employees and calculate funding, open cycles to managers to enter proposals, load approved salary updates and awards, finalize compensation cycles, or cancel cycles to adjust the configuration and rebuild the cycles.

- Cycle Role Management

The pages within this component enable the compensation administrator and designated administrators to update group node role access for the organization tree hierarchy defined for your compensation cycle. For each group node, an employee ID and employee record number can be assigned a specific access role (Submitter, Reviewer, Confirmer, and so on) that provides access to view, update, and approve salary and award proposals.

- Plan Funding

Use the pages within these components to provide a summary of all cycle funding within each organizational group. Through this functionality you can view and update funding based on the provisions of the cycle definition and the processing status within the cycle. You can also manually distribute funding.

- Transaction Management

Use the pages within this component to detail the calculated compensation proposals for organizational groups and funding basis. Compensation administrators may update proposals at either the group or individual level at any time after the cycle has been released for manager entry. This component also features group and individual view capabilities. At the individual level users can view compensation history.

Cycle Statuses

The Cycle Status is used by the compensation administrator to evaluate where the cycle stands at any time during the process. This status is directly linked to the Compensation Administration component that is used to move the cycle through various steps and processes. This display fields communicate the status of the cycle and the person responsible for setting that status in motion.

During cycle definition (and prior to running the Cycle Build process) the status of the cycle equals *Defined*. The As of date and Last Processed By fields represent the last edit date and operator ID. As each activity is completed, the system updates the status accordingly.

Cycle Status	As of Date	Last Processed By
Defined	Last edit date of the Compensation Cycle definition.	Displays the ID of the last user to edit the cycle definition.
Canceled	Date of action.	Displays the ID of the user who executed the cancel cycle.
Build in Progress	Last run date for Cycle Build process.	Displays the ID of the last user who ran the Build/Calculation process while in the <i>Build In Process</i> status.
Built	Last run date for Cycle Build process.	Displays the ID of the last user who ran the Build/Calculation process to the <i>Complete</i> status.
Open	Date of action.	Displays the ID of the user who executed an approve funding action.
Finalized	Date of action.	Displays the ID of the user who executed the finalize cycle.

Group Statuses

The Group Status is used to identify where each group (or reporting node) is within the compensation cycle. This is the primary status indicator used during manager self-service to track compensation proposals.

Group Status	As of Date
Calculated	Last run date of Cycle Build process.

Group Status	As of Date
In Progress	Date of action.
Submitted	Date of action.
Approved	Date of action.
Pushed Back Note. If you have implemented the AWE framework, the user is the AWE itself.	Date of action.
Ready to Load	Date of action.
Complete	Last run date of Load Salary and Award Update process.

Proposal Statuses

The Proposal Status code is used to indicate whether the approved updates and awards have been loaded successfully for an individual within one or more of the plans with a *Ready to Load* group status. The system only updates the status from the *Pending* status following the Load Salary Updates and Awards process.

Proposal Status	As of Date
Pending	Last run date of Load Salary and Award Update process.
Load Error	Last run date of Load Salary and Award Update process.
Bypassed	Last run date of Load Salary and Award Update process.
Processed	Last run date of Load Salary and Award Update process.

Security Considerations

Access to the Manager Self-Service component is controlled through standard PeopleSoft security. The system uses PeopleCode to determine whether the current user has the credentials to access the component. This is necessary because URLs can be distributed, copied and modified to invoke the component directly, even though no direct portal access exists.

Access to a specific compensation cycle is dependent upon the cycle status together with information residing in the Cycle Role Access table. The Cycle Role Access table retains role access security to a specific group node in your organizational tree hierarchy. Depending upon the role access, the user may have the proper credentials to review, update, or approve proposals.

This table outlines the criteria the system uses to provide access to the pages within the Manager Self-Service component.

Cycle Status	Workforce Compensation Solutions (WCS) Role	Manager Self-Service Access Allowed?
Defined	All	No
Build in Progress	All	No
Built	Manager Approver Reviewer	No
Cancelled	Manager Approver Reviewer	No
Open	Manager Approver Reviewer	Yes
Finalized	Manager Approver Reviewer	No Note. Users can access date ranges only.

Compensation Alerts

eCompensation Desktop Manager alerts are limited to compensation events that are specifically related to the Compensation Cycle business process. There are three primary areas where changes are of interest to managers who need to make and submit proposals:

- Changes to the compensation cycle status that determine the state of the entire business process.
- Changes to the manager's group status that describe the point of completion in the compensation cycle.
- Changes to the access roles that identify the role or responsibility of the individual manager within the business process.

Compensation alert messages are generated by compensation administrators, senior managers, line managers, and compensation processes after certain activities are performed. An alert is simply a message logged during the process, which can be viewed and acted upon by a participant when a manager accesses the Allocate Compensation page.

The system displays an alert entry with basic information such as a task name, a task description, or other instructional text. It can also include an attachment.

The Enterprise Component's Event Framework provides the content the actual message that is displayed to the user. In this common publish-subscribe scenario, the event is the published message, which indicates that something of interest occurred. This is important as an event may have many subscribers and many recipients. The subscription process is contained within the management (creation, update and deletion) of the compensation alert messages.

Note. The system does not deliver direct manager component access through the portal navigation tree outside of the manager's home page.

Document and Link Configuration

The HCM Attachment Framework is a flexible and user-friendly component for integrating document and link management for specific application areas. Using the pages included in the Attachments component, you can make documents or links context-sensitive and provide security based on standard PeopleSoft roles, permissions, and data values in HCM.

Here is how the system displays the Attachments group box to users in Manager Self Service:

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
2009 Accomplishments.doc	2009 Accomplis	Mgr Only ▼	06/25/2009 11:25:06AM	Betty Locherty	
2009 Objectives.doc	2009_Objective	EE and Mgr ▼	06/25/2009 11:25:06AM	Betty Locherty	

[Add Attachment](#)

Attachments group box

Because the implementation of the Attachment Framework depends on a predefined set of keys, PeopleSoft has delivered system data that specifies the key structure for Compensation Alert documents. On the Configure Keys page the *HWCS* object owner ID and *ALRT* sub ID define the application that has been implemented for use.

Note. eCompensation Desktop Manager has not implemented the ability for users to add or update existing documents. All documents must be defined and loaded by the compensation administrator using the Attachment pages. Therefore, stored attachment documents are displayed as read-only to the user.

Located in the Attachments folder, the Define Attachments page (select Set Up HRMS, Common Definitions, Attachments) allows you to specify a configuration for each document or link. To simplify this concept, think of a configuration as the system's identifier for a defined document target. The term *attachment* includes both documents and links. The term *configuration* refers to many types of files, including Word documents, Excel spreadsheets, PDF files, or links to internal or external websites. The configuration provides the details regarding the intended target including a complete definition, a status, and the type or form of attachment. More importantly, it stores the actual document or link and the PeopleSoft roles that are allowed access to it.

On the Define Attachments page, PeopleSoft recommends that you use the same ID to set up both the attachment configuration and the compensation cycle ID. Although this is not required, it is beneficial to use the compensation cycle ID as the key identifier for the attachment. For example, if you have an annual merit cycle called *2009 Focal*, a configuration ID of *2009 FOCAL* allows you to quickly identify the attachment that is associated to that particular compensation cycle. This can be helpful if you are administering many compensation cycles that need their own attachments. In addition, the effective date enables you to create multiple versions of the same document over time for the same configuration.

To attach a document or URL to an alert, select Set Up HRMS, Common Definitions, Attachments, Define Attachments. On the Define Attachments page select *WCS_ALERT* as the configuration ID. You can then change the instructional text, or add an attachment and URL. In addition you can select the roles to which the system will display the alert and attachment or URL.

Here is an example of the Define Attachments page for compensation instructions using the *WCS_ALERT* configuration ID:

Define Attachments

Configuration ID: WCS_ALERT

Attachment Configuration Details Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1990 📅 *Effective Status: Active ⌵ + -

*Description: Compensation Instructions Short Description: WCS_ALERT

Comments: Compensation Instructions for Managers with Proposals 📄

*Attachment Type: Attachment ⌵

Attachment: SAMPLE_MARKET_PAY.PDF View Attachment Delete Attachment

Authorized Roles Customize | Find | View All | 📄 | 📄 | First 1 of 1 Last

*Role Name	Description		
1 Manager 🔍	Manager	+	-

Last Upd User: SAMPLE Updated on: 06/12/09 11:45:15AM

Define Attachments page

The Maintain Definitions page enables you to set up context-sensitivity for each attachment configuration. It is the combination of two key values – Compensation Cycle ID and Event Code – that enable you to define the scope of the document's availability to the end user. You can set up the context keys in any combination, including a blank value that means *any*. The key values prompt against the Compensation Cycle Configuration and Compensation Alert Setup tables for selection. The system performs no specific validation as the combination of the two keys (including the effective date) will typically result in a found attachment.

Note. At a minimum, the event code should be specified; otherwise all alerts (regardless of event code) could potentially retrieve the same attachment configuration. The system attempts to locate and retrieve the configuration for an attachment when a user attempts to access the Allocate Compensation page (select Manager Self Service, Compensation and Stock, Allocate Compensation). If the system finds a valid attachment, it displays the Info column and a link in the form of an icon. Conversely, if the system does not locate a attachment for any of the alert messages listed in the grid, it hides the column. When the user clicks the Info icon, the system opens a new browser window and displays the associated document.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Common Components," Configuring Attachments

Chapter 3

Setting Up and Implementing Compensation Cycles

This chapter discusses how to:

- Build trees
- Setting up prorate and rounding rules.
- Define compensation cycles.

Building Trees

This section discusses how to build trees using the Tree Builder Utility run control page.

Page Used to Build Trees

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tree Builder Utility	HCSC_TREEBLD_RNCTL	Set Up HRMS, Product Related, Compensation, Utilities, Tree Builder Utility, Tree Builder Utility	Use this page to build trees for your eCompensation Manager Desktop application.

Building a Tree

Access the Tree Builder Utility page (Set Up HRMS, Product Related, Compensation, Utilities, Tree Builder Utility, Tree Builder Utility).

Tree Builder Utility run control page

Once you create a tree using PeopleTools, do not change the tree structure. If you change the structure, you will not be able to use the existing run control or tree name to build additional trees. The system skips the steps used to build the new tree and displays a message if you change the structure and the tree has already been built.

Hierarchy Basis

Select a hierarchy structure.

Note. You cannot select *Department Tree* as the hierarchy basis because PeopleSoft HCM does not have a data model which supports the dynamic building of a department chain. You must create the department tree manually using PeopleSoft Tree Manager.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager, Using PeopleSoft Tree Manager*

Set ID

Select the set ID that you want to use for the tree you are building.

Note. To activate this field, select Tree Manager, Tree Structure. Click Search. Select *SUPERVISOR_ID*. Select the Setid Indirection radio button that appears in the Additional Key Field group box. Click Save. Return to this page and select *Supervisor ID* as the hierarchy basis. The Set ID field is now available for edit. Fill in the remaining fields and then click Run. Select Tree Manager, Tree Viewer to confirm that the system created the tree.

Tree Name

Enter the name of the tree that you are building.

Effective Date of Tree

Select or enter the date that the tree will become effective.

Description

Enter a description for the tree.

Category	Select or enter a category for the tree you are building.
Existing tree-will be replaced	This field is set by the system. If you do not want to replace the tree, you must change one of the key fields (Set ID, Tree Name, or Effective Date of Tree). Otherwise, the system will replace an existing tree that you or someone else in your organization created with the same key values.

Top Value on Tree

You must specify at what point in the hierarchy the tree should start. This is often referred to as the *root* node. For many organizational hierarchies this is a simple entity key, such as department ID or position number. For employee-based hierarchies (like supervisor) this represents a specific manager and job. Because of this variability, the entry of the root value is managed by the system based on the hierarchy basis you select.

Employee ID	Select the ID of employee from where you want the tree structure to start.
Employment Record	Select the employee record number from where you want the tree structure to start.
Root Value	Enter a root value only if you are using a tree that is <i>not</i> based on the employee ID, like a position-based tree. In this case, the system disables the employee ID fields.

Setting Up Prorate and Rounding Rules

This section provides an understanding section on rounding rules and proration calculation and discusses how to:

- Define rounding rules.
- Define prorate rules.

Understanding the Use of Rounding Rules

This section discusses:

- Multiple Currencies
- Rounding approach

Multiple Currencies

eCompensation Manager Desktop has the capability to handle multiple currencies. This allows managers to view data and submit pay and bonus recommendations in their local currencies. However, for the system to manage to an overall budget, amounts entered in a currency that is different than the base currency that is used for budget purposes are converted to the base currency for the funding process (defined in the cycle definition) and stored in that base currency.

When these amounts are needed for display in a currency other than the base currency, the system converts the stored amount to the needed display currency. All currency conversion is based on PeopleSoft-delivered currency conversion functionality.

Rounding Approach

Another configurable aspect of eCompensation Manager Desktop is the ability for the system to round input amounts to user-defined increments, or accept them in increments of .01. These increments can be defined by currency.

The rounding rule is applied uniformly throughout the application at a number of critical spots in the process:

- During the budget build process rounding rules apply to calculated funding amounts for variable compensation and salary plans.
- During the funding adjustment phase any employee-level funding adjustments input by the compensation administrator need to be rounded in accordance with the appropriate rule.
- During the manager self-service phase proposed values need to be rounded in accordance with the appropriate rule.
- During the load process posted proposed amounts are rounded in accordance with the appropriate rule.

Rounding takes place by plan against the proposed values (for example, merit increases are calculated separately from promotions). For example, Japan (JPY) values may be rounded to increments of 100.00 while South Korean (KRW) values may be rounded to increments of 500. Rounding rules are defined for salary and monetary variable compensation plans separately, which are defined in the cycle definition.

In the case of salary values, there is an underlying assumption that the current base salary amount is properly rounded. The Cycle Build process automatically rounds annual rates to 2 decimal places for calculation purposes.

For example, if values are rounded to the nearest 1.00, a funded percentage of 3 percent on a base salary of 35,122.00 JPY would be 1053.66 JPY. In this case the system would round the funded amount to 1,054 JPY. If the starting base salary was 35,122.00 JPY, the new base salary would be 36,176.00 JPY not 36,175.66 JPY.

Rounding Rule	Starting Base Salary	Funding Percentage	Rounded Value	New Base Salary
Nearest 1.00	35,122.00	3 percent	1,054	35,122.00 + 1,054 = 36,176.00

Rounding takes place based on the paid currency of the individual. This means that values viewed in a currency other than the paid currency of the employee may not appear as a rounded value.

Understanding Proration Calculation Rules

PeopleSoft eCompensation Desktop Manager enables you to configure proration rules to suit your business needs. A prorate rule is used to apply a formula to calculate a percent value that represents the employee's eligibility for the compensation cycle. A proration factor of 1.00 would signify that the employee is eligible for the entire period. This proration factor is applied to adjust the calculated funding amounts during the build process. On the Compensation Cycle Definition – Salary page you enter the following information:

1. Earliest eligible start date.
2. Full period start date.
3. Eligible end date.

See [Chapter 5, "Administering Compensation Cycles," Administer the Cycle Process Flow, page 64.](#)

The system calculates the proration factor by reviewing the employee's job history for the eligible period and accumulating the number of periods that meet the specified proration rule formula.

<i>Period</i>	<i>Description</i>
Eligible Period	The time between the Earliest Eligible Start Date (1) and the Eligible End Date (3) that a person is eligible.
Full Period	The time between Full Period Start Date (2) and Eligible End Date (3).

The maximum prorate factor is the time from the Eligible Period divided by the Full Period. If the Earliest Eligible Start Date is the same as Full Period Start Date then the prorate factor is 1.0000. If the Earliest Eligible Start Date is prior to the Full Period Start Date then the prorate factor can be greater than 1.0000.

For example, a typical merit cycle might be from 1/1/2009 to 12/31/2009 (12 months) with a hire cutoff date of 10/1/2008.

This cycle would calculate the prorate factor from 10/1/2008 through 12/31/2009 (15 months), giving those that were hired before the normal cycle (12 months) a prorate factor of up to 1.25 (15 months / 12 months = 1.25) to make up for the time they worked in addition to the typical merit cycle.

Note. To highlight employees who have a proration factor greater than 1, the system displays a warning message which is written to the WCS Message Log table and to the log file during build processing.

Pages Used to Define Prorate and Rounding Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Rounding Rules	WCS_ROUND_TBL	Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Rounding Rules, Define Rounding Rules	Set up rounding rules to determine calculated funding amounts for funding adjustments and proposed amounts for variable compensation and salary plans.
Define Prorate Rules	WCS_PRORATE_TBL	Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Prorate Rules, Define Prorate Rules	Set up rules for proration analysis and factor calculation.

Defining Rounding Rules

Access the Define Rounding Rules page (Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Rounding Rules, Define Rounding Rules).

Define Rounding Rules

Rounding Rule: HXCMP2

***Description:**

Notes:

Rounding Rules View All First 1 of 1 Last

***Effective Date:**

Prorate Rule Parameters

***Rounding Method:** ***Rounding Increment:**

Currency Specific Rules Customize | View All | First 1-5 of 6 Last

*Currency Code	Description	*Rounding Increment	+	-
AUD	Australian Dollar	<input type="text" value="50.000000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
EUR	euro	<input type="text" value="100.000000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
GBP	Pound Sterling	<input type="text" value="100.000000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
INR	Indian Rupee	<input type="text" value="50.000000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
JPY	Yen	<input type="text" value="50.000000"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Define Rounding Rules page

Rounding Rule Identifies the rounding rule. You enter the characters in this field in the Add mode before you access the page. The maximum length is six characters.

Rounding Rules

Effective Date Select or enter the date the rule becomes effective.

Prorate Rule Parameters

- Rounding Method** Select one of these values to indicate the method with which the system should round values that are input and calculated:
- *Down*
 - *Nearest*
 - *None*
 - *Up*
- Rounding Increment** Enter the increment by which you want the system to round input amounts. Rounding increments must be *1000,500,100,50,10,5,1,0.1, or 0.01*.

Currency Specific Rules

- Currency Code** Select the currency for which you want to apply the rounding rule. The system displays the description to the right of the currency.
- Rounding Increment** Enter the rounding increment that you want the system to use for the corresponding currency. Rounding increments must be *1000,500,100,50,10,5,1,0.1, or 0.01*.

Defining Prorate Rules

Access the Define Prorate Rules page (Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Prorate Rules, Define Prorate Rules).

Define Prorate Rules

Proration Rule: HXCMP1
 *Description: Proration Rule 1
 Notes: 2009 prorate rules for promotions

Prorate Rules View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Frequency: Daily
 Date Indicator: Day of the Month:

Prorate Rule Parameters

Include Temporary Time Last Increase Date
 Include Part Time Last Hire Date

Weekly Minimum Standard Hours: 0.00

Eligible Payroll Statuses Customize | View All | First 1-4 of 4

*Payroll Status		
Active	+	-
Leave With Pay	+	-
Retired With Pay	+	-
Terminated With Pay	+	-

Restart Eligibility Date Action Reasons Customize | View All | First 1 of 1 Last

*Action	Action Description	*Reason	Description
1 PRO	Promotion	NCP	Normal Career Progression

Define Prorate Rules page

Proration Rule Identifies the proration rule. You enter the characters in this field in the Add mode before you access the page. The maximum length is six characters.

Prorate Rules

Effective Date Select or enter the date the rule becomes effective.

Frequency Select one of these values to indicate the frequency with which the system should apply the proration rule:

- *Daily*
- *Weekly*
- *Monthly*

Date Indicator Use this field only when the proration frequency is set to *Monthly*. Select one of these values to indicate when the system should use the proration rule:

- *Day of Month*
- *End of Month*

Day of Month If you select *Day of Month* in the Date Indicator field, you must also enter the day on which the proration rule is used. This number cannot be greater than 28.

Prorate Rule Parameters

Include Temporary Time Select to include the proration rule in calculations involving temporary time. If this check box is deselected, the Regular/Temporary field on the employee's Job Data - Job Information page for which the proration rule is being applied must have an employment status of *Regular* to be considered eligible.

Include Part Time Select to include the proration rule in calculations involving part-time pay. If this check box is deselected, the Full/Part field on the employee's Job Data - Job Information page for which the proration rule is being applied must have an employment status of *Full-Time* to be considered eligible.

Last Increase Date Select to indicate that the eligibility date for compensation adjustments starts with the date the employee's pay was last increased.

Note. The system uses the Last Increase Date field in conjunction with the fields in the Restart Eligibility Date Action Reasons group box. The last increase date will only restart based on the action reasons that are specified.

Last Hire Date Select to indicate that the eligibility date for compensation adjustments starts with the date the employee was last hired.

Weekly Minimum Standard Hours This field is only used when the Include Part Time check box is selected. The system only makes proration calculations on time if the employee is part time and the weekly standard hours are greater than or equal to this number.

Eligible Payroll Statuses Select the payroll status for which the system should apply the proration rule. You can select multiple statuses by clicking the Add a new row button.

Restart Eligibility Date Action Reasons

Action and Reason Select an action and reason to indicate why eligibility should be restarted. The system displays descriptions next to the action and reason that you select. To add multiple actions and reasons, insert additional rows.

Defining Compensation Cycles

This section discusses how to:

- Enter general cycle definition parameters.
- Enter salary calculation information.
- Enter award information.
- Configure the Manager Self-Service page.

Prerequisites for Defining Compensation Cycles

Here are the prerequisites that you need to complete before you define your compensation cycles:

- Define group IDs.
To generate documents for a group of employees, HR administrators or managers must specify the ID of the group that contains the employees they want to process.
- Define trees.
- Define ePerformance document types (optional if the cycle is applying ePerformance integration).
- Define a configurable matrix (optional).
- Define variable compensation plans (optional).
- Define rounding rules.
- Define proration rules.

See Also

Chapter 2, "Understanding Compensation Cycles," page 5

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Chapter 3, "Setting Up and Implementing Compensation Cycles," Building Trees, page 25

PeopleSoft Enterprise ePerformance 9.1 PeopleBook, "Setting Up Document Templates," Defining Document Types

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation, "Setting Up Variable Compensation Plans"

Chapter 3, "Setting Up and Implementing Compensation Cycles," Setting Up Prorate and Rounding Rules, page 27

Pages Used to Define Compensation Cycles

Page Name	Definition Name	Navigation	Usage
Compensation Cycle Definition - General	WCS_ECM_CYC_DEF	Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, General, General	<p>Compensation administrators use this page to enter parameters that are not specific to any one salary plan or bonus plan. Parameters include funding period begin and end dates, currency conversion settings, employee group parameter, performance integration settings, help URLs and other settings that control manager self-service.</p> <p>Note. Performance integration settings could impact funding calculation for a salary plan using a configurable matrix.</p>

Page Name	Definition Name	Navigation	Usage
Compensation Cycle Definition - Salary	WCS_ECM_CYC_SAL	Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Salary, Salary	Compensation administrators use this page to control the calculations of one or more compensation rate related increases. Examples includes increases based on merit, pay adjustment, promotions, and so on. These parameters may include relevant salary rate codes, calculation rule matrixes, prorated and rounding rules, and applicable action and reason codes.
Compensation Cycle Definition - Awards	WCS_ECM_CYC_AWD	Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Awards, Awards	Compensation administrators use this page to enter parameters for including variable compensation bonus plans in the cycle. Parameters include variable compensation plan and payout period, plan type, and budget calculation type.
Compensation Cycle Definition - Self-Service	WCS_ECM_CYC_MSS	Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Self-Service, Self-Service	This page enables compensation administrators to configure behaviors for the self-service components. Options include the ability to view or hide some of the columns that will be displayed on the Manager Self-Service direct reports grid.

Entering General Cycle Definition Parameters

Access the Compensation Cycle Definition - General page (Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, General).

General		Salary	Awards	Self-service
Cycle ID:	HXCMPDEF7	*Cycle Description:	Cycle Defined 7	
Parameters				
Funding Period Begin:	01/01/2008	Cycle Status:	Define	
Funding Period End:	12/31/2008	Last Update Date/Time:	01/04/2009 11:49:43PM	
*Period Description:	Cycle dEfinEd 7 2008	Last Update User ID:	SAMPLE	
*Group ID:	HXCMPGROUP16	eCompensation Group 16		
Hierarchy				
Tree Set ID:	<input type="text"/>			
*Tree Name:	HXCMPPOSTREE1	*Tree Effective Date:	01/01/2000	
*Default Manager Role:	None			
Tree Node Label:	Position Number			
Cycle Currency				
*Planning Currency:	USD	Conversion As Of Date:	<input type="text"/>	
Rate Type:	<input type="text"/>	Market Rate Index:	<input type="text"/>	
Performance Integration				
*Source Data:	PeopleSoft ePerformance			
Period Begin Date:	01/01/2008	Period End Date:	12/31/2008	
Document Type:	HXCMPDT1	Use Rating:	EP_RATING	

Compensation Cycle Definition - General page

Cycle ID

Before you access this page enter a short phrase or abbreviation that uniquely identifies the cycle. Typically, you create this identifier when you are adding a new cycle.

Note. Do not use spaces when you create a cycle ID as this can cause problems when embedding a link into an email where this field is used as a key.

Cycle Description

Enter a term that best describes the cycle.

Parameters

Funding Period Begin and Funding Period End

Enter the beginning and ending dates of the funding cycle. The Funding Period Begin date must be greater than the Funding Period End date. Typically funding periods are a year in length.

Period Description

Enter a description for the funding period.

Cycle Status, Last Update Date/Time, and Last Update User ID These fields display the status of the cycle, the date that the cycle was last updated, and the user ID of the person who last updated the cycle.

Group ID Select the group that defines the population of employees for which the cycle applies.

Note. The Compensation Administrator must have access to the group through standard group security. In addition, this component must be included in the Group Component list. The Cycle Definition component should also be added to the default set within group definition.

Hierarchy

Tree Set ID If the tree name is based on a setID (for example department, location, and so on) select one using the Lookup button. If the tree is not based on a setID, this field is not required.

Tree Name Select the tree that is used as the basis for structuring the organizational hierarchy within the Manager Self-Service component.

Tree Effective Date Select the effective date of the tree you selected in the Tree Name field.

Default Manager Role Select one of the values from the drop-down list menu to indicate the hierarchy that you want the cycle to be based on. Values include:

- *Position Incumbent (Rpts To)*(reports to)
- *Department Position Nbr*
- *Manager ID*
- *Supervisor ID*
- *None*

Note. If you do use this field, the Calculation and Build process populates the Cycle Access table with the appropriate employee ID and sets the role to Manager. The Cycle Build process only defaults to the Cycle Access table with Submitter role access, which is based on the Default Manager Role setting. The compensation administrator can enter additional cycle role access.

Tree Node Label Enter a description for the tree node associated with the compensation cycle.

Cycle Currency

Planning Currency Select the currency code that you want to use from the currency code table.

Conversion As Of Date Enter the date that you want the system to convert the currency that you are using for this cycle. The underlying market rate tables must be fixed from the point that compensation is calculated within the cycle.

Rate Type Select the rate type that you want to use for the cycle.

Market Rate Index Select a value from the Rate Index table to indicate the index you want the system to use to calculate the conversion of the currency.

Performance Integration

Source Data If you are integrating information from eCompensation Manager Desktop with a Performance application, select the appropriate application: Values include:

- *PeopleSoft ePerformance*
- *Other*
- *None*

Note. If you select *Other*, it is the your responsibility to populate the PS_WCS_EP_APPR table

Period Begin Date and Period End Date Enter the date range for performance documents.

Document Type Select the appropriate performance document type.

Use Rating Select the use rating that you are using in your ePerformance application.

Note. The system makes the Period Begin Date, Period End Date, Document Type, and Use Rating fields unavailable for entry unless you select *ePerformance* as the value in the Source Data field.

Entering Salary Calculation Information

Access the Compensation Cycle Definition - Salary page (Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Salary, Salary).

General		Salary		Awards		Self-service	
Cycle ID:	HXCMPDEF7			Cycle Description:	Cycle Defined 7		
Funding Period							
Begin:	01/01/2008	End:	12/31/2008	Description:	Cycle dEfinEd 7 2008		
Salary Parameters							
Increase Effective Date:	07/01/2008	New Hire Eligibility Date:	10/31/2007				
Eligible Rate Codes Customize View All First 1-2 of 2 Last							
*Rate Code	Description						
HXFLT1	e-Comp Flat Rate 1 Base Pay						
HXFLT2	e-Comp Flat 2 Base Rate						
Salary Plans Find View All First 1 of 1 Last							
*Plan:	SAL_PLAN_1	*Plan Sequence:	1				
Rounding Rule:		<input type="checkbox"/> Use Configurable Matrix	Matrix ID:				
Funding Percent:	4.00			<input checked="" type="checkbox"/> Discretionary			
Minimum Percent:	3.00			<input type="checkbox"/> Default Proposal to Funded			
Maximum Percent:	8.00						
Proration Parameters							
<input checked="" type="checkbox"/> Use Prorate Exception Table							
Proration Rule:		Full Period Start Date:					
Earliest Eligible Start Date:		Eligible End Date:					
Action Reasons Customize Find View All First 1 of 1 Last							
*Sequence	*Action	*Reason	*Display As	Default			
1	PAY	ADJ	Adjustment	<input checked="" type="checkbox"/>			

Compensation Cycle Definition - Salary page

Salary Parameters

Increase Effective Date Enter the date when you want any proposed compensation changes to be effective. This date must be on or after the Funding Period Begin Date.

New Hire Eligibility Date Enter the date when new hires are eligible for compensation changes. This date must be before the Funding Period Begin Date

The system is designed to allow customers to filter out employees that have not worked for a minimum period of time prior to the funding period to be considered eligible. For example, you might have a business policy that employees must be employed for at least 6 months to be considered eligible for any form of an increase.

Eligible Rate Codes

Rate Code and Description Select the rate code that you want to use for changes to compensation. The system automatically fills in the description after you select the rate code.

Note. The system allows you to add rows to enable you to add multiple rate codes. However, an employee can only have one compensation rate code adjusted during the Compensation Cycle process.

Salary Plans

Plan Enter a description for the salary plan that you want managers to see on the Manager Self-Service pages.

Plan Sequence Enter a number to indicate the order in which you want the system to display salary plans within the self service pages for the compensation cycle.

Rounding Rule Select the rounding method that you want to use for the salary plan.

Use Configurable Matrix Select this check box if you plan to use a configurable matrix to calculate funding information. If you select this check box, the system makes the Funding Percent, Minimum Percent, and Maximum Percent fields unavailable for entry.

Matrix ID Select the matrix that you want to use to drive the funding calculation.
See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Defining Salary Increase Guidelines Using a Configurable Matrix.

Funding Percent Enter the total funding percent by which you would allow a manager to adjust salaries in their department.

Minimum Percent Enter the minimum percent by which you would allow a manager to adjust an employee's salary.

Maximum Percent Enter the maximum percent by which you would allow a manager to adjust an employee's salary.

Discretionary Select this check box if you want to enable managers to override the calculated funding amount.

Default Proposal to Funded Select this check box to set the default proposal to the calculated funded amount.

Proration Parameters

Use Prorate Exception Table	Select this check box if you want to use information from the Prorate Exception (WCS_PRO_EXC_TBL) table in the build process. If there is no entry in the Prorate Exception Table, the build process sets the prorate factor to 1.
	Note. If you select this check box, the system makes the Proration Rule, Earliest Eligible Start Date, Full Period Start Date, and Eligible End Date fields unavailable for entry.
Proration Rule	Select the proration rule that you want to use for salary increases or adjustments. The values that you are able to select come from the Prorate ID table (WCS_PRORATE_ID).
Earliest Eligible Start Date, Full Period Start Date, and Eligible End Date	Enter the begin and end dates to which the proration period applies. These fields are required if you specify a proration rule. Typically, this period is for the year prior to the funding period. See Chapter 3, "Setting Up and Implementing Compensation Cycles," Understanding Proration Calculation Rules, page 28.
<i>Action / Reasons</i>	
Sequence	Enter a number to control the order that you want the system to load the action reason for the plan when updates are run.
Action	Select an action from the Action table.
Reason	Select a reason from the Action Reason table.
Display As	Enter a description for the action that you want managers to see when they access the Manager Self-Service page.
Default	Select the action that you want to use as a default on the Manager Self-Service page. You must select only one action for the plan.

Entering Award Information

Access the Compensation Cycle Definition - Awards page (Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Awards, Awards).

General		Salary		Awards		Self-service	
Cycle ID:	HXCMPDEF7			Cycle Description:	Cycle Defined 7		
Funding Period							
Begin:	01/01/2008	End:	12/31/2008	Description:	Cycle dEined 7 2008		
Award Plans							
Customize Find View All 1 of 1 First Last							
*Variable Compensation Plan	*Payout Period	*Award Type	*Display As	*Funding Calculation	Discretionary	Default Proposed	Rounding Rule
HXCMPVC10	YEAR	Cash	VC Plan 1	Manual	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HXCMP1

Compensation Cycle Definition - Awards page

Award Plans

Variable Compensation Plan Select a plan from the Variable Compensation Plan table.

Payout Period Select a payout period from the Variable Compensation Payout Period table.

Note. The payout period has to be within the start and end date of the cycle period to be added to the definition.

Award Type Select an award type. Values include:

- *Cash*
- *Non-Cash*
- *Stock*

The system derives these default values from the variable compensation plan types:

- Cash: *Discretionary (D)*, *Goal Sharing (G)* or *Profit Sharing (P)*.
- Stock: *ISO (I)*, *NSAR (K)*, *NQ (Q)*, *RSA (R)* or *ISAR (S)*.
- Non-Cash: *Non-Monetary (N)* or *Other (O)*.

Display As Enter a description for the award plan that you want managers to see on the Manager Self Service page.

Funding Calculation Select the type of funding calculation that you want the system to use for the variable compensation plan. Values are *VC Calc* and *Manual*.

Note. If you select *VC Calc* the funding is defaulted to the award amounts that are calculated by variable compensation at the employee level. If you select *Manual* the compensation administrator will have to manually allocate a funding amount for each group node for the variable compensation plan.

- Discretionary** Select this check box if you want to enable managers to override the calculated funding amount. If you selected *Manual* as the Funding Calculation method for the VC plan, you must select this check box.

- Default Proposed** Select this check box if you want the system to default the plan to the proposed amount to the calculated variable compensation amount or the manually funded amount for each employee. If you do not select this check box, the system displays *0.00* as the proposed amount.

- Rounding Rule** Select the rounding rule that you want the system to use to calculate award amounts. If you do not specify a rounding rule, the system sets all rounding of the funded and proposed amounts to 2 decimals.

Configuring the Manager Self-Service Page

Access the Compensation Cycle Definition - Self-Service page (Set Up HRMS, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Self-Service, Self-Service).

<div style="display: flex; border-bottom: 1px solid black;"> General Salary Awards Self-service </div>					
Cycle ID:	HXCMPDEF7		Cycle Description:	Cycle Defined 7	
Funding Period					
Begin:	01/01/2008	End:	12/31/2008	Description:	Cycle dEined 7 2008
Configuration					
<input type="checkbox"/> Enable Currency Conversion	<input checked="" type="checkbox"/> Enable Indirect Report Updates	<input checked="" type="checkbox"/> Display Award History			
<input checked="" type="checkbox"/> Enable Notepad	<input checked="" type="checkbox"/> Enable Role Delegation				
Approvals					
<input checked="" type="checkbox"/> Enable Approvals Workflow					
Process ID:	<input type="text" value="ApproveCompensationProposals"/>		Approve Compensation Proposals		
Definition ID:	<input type="text" value="ByTreeNode1Lvl"/>		Compensation One Step Approval		

Compensation Cycle Definition - Self-Service page (1 of 2)

Grid Display Settings			
*Display Type: Salary Grid			
Field Layout			
Field	Select	Discretionary	Description
Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Exclude	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Employee ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Employment Record	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Business Unit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Job Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Position Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Salary Admin Plan	<input type="checkbox"/>	<input type="checkbox"/>	
Salary Grade	<input type="checkbox"/>	<input type="checkbox"/>	
Salary Step	<input type="checkbox"/>	<input type="checkbox"/>	
Full/Part	<input type="checkbox"/>	<input type="checkbox"/>	
Performance Rating	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Currency	<input type="checkbox"/>	<input type="checkbox"/>	
Current Salary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Compensation Cycle Definition - Self-Service page (2 of 2)

Configuration

- Enable Currency Conversion** Select to enable currency conversion on the Manager Self-Service Direct Reports Detail page.
- Enable Indirect Report Updates** Select to enable updates to information for indirect reports on the Manager Self-Service Direct Reports Detail page.
When this check box is selected, the system provides updates to employee information that is one level down from the node to which the manager has Submitter role access.
- Display Award History** Select to display award history on the Manager Self-Service Direct Reports Detail page.
- Enable Notepad** Select to enable the notepad on the Manager Self-Service Direct Reports Detail page. The notepad is used primarily for manager comments.
- Enable Role Delegation** Select to enable a manager to delegate their compensation role responsibilities to another manager or employee.

Approvals

Enable Approvals Workflow

Select to enable the system to generate approval workflows for managers and employees participating in the compensation cycle.

Note. When Enable Approvals Workflow is selected, the Confirmer role is not available in the Access Type drop down list box on the Administer Cycle Roles page.

Process ID and Definition ID

Select the process ID and definition ID that you want to use to generate approval workflow. These IDs are entered on the Setup Process Definitions page (select Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions).

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions.

Grid Display Settings

Display Type

Select the type of grid that you want the system to display on the Manager Self-Service page. The system displays the fields associated with the grid you selected. Values include:

- *Awards Grid*
- *Salary Grid*
- *Worker Detail*

Field Layout

This grid is pre-populated with a fixed set of fields. Select the check boxes to indicate that fields you want to appear within the Individual Proposals grid on the Manager Self-Service - Direct Reports Detail page for a particular section (Salary, Awards, or Worker). Some of the check boxes within the grid may be read-only indicating that there are no field values for the particular field or they may be disabled based on another setting for the compensation cycle. The system also does not allow users to add or delete rows.

Field

Displays the name of the field associated with the grid you selected.

Select

Select the check boxes associated with the fields that you want to appear within the information grid on the Manager Self-Service - Direct Reports Detail page.

**Discretionary and
Description**

Select the text that you want to appear for the field on the Manager Self-Service pages. The system displays the description to the right of the Discretionary field. If you populate the Discretionary field, the system overrides the Manager Self-Service component with the field label from the corresponding value found in the text catalog.

Note. You will need to provide the discretionary label values by setting them up in the HR Text Catalog in order to see them listed as part of the prompt. We provide a structure within the HR Text Catalog where you can create these values.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

Chapter 4

Configuring Chart Pagelets and Alerts

This chapter discusses how to:

- Configure and preview chart pagelets.
- Define, configure, and maintain compensation alerts.

Note. Chart pagelets are a feature that can be enabled to provide a graphical representation of the data for a cycle. Each self service component can be configured to allow for the display of one-to-many charts.

Configuring and Previewing Chart Pagelets

This section discusses how to:

- Configure chart pagelets.
- Preview chart pagelets

Pages Used to Configure Chart Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compensation Chart Pagelets	WCS_PGLT_CONFIG	Set Up HRMS, Product Related, Compensation, Utilities, Compensation Chart Pagelets, Compensation Chart Pagelets	Associate chart pagelets to components for use within the eCompensation Manager Self Service functionality.
Compensation Chart Preview	WCS_PGLT_PREVIEW	Set Up HRMS, Product Related, Compensation, Utilities, Compensation Chart Preview, Compensation Chart Preview	Test or preview the chart pagelets available within the eCompensation Manager Self Service functionality.

Configuring Chart Pagelets

Access the Compensation Chart Pagelets page (Set Up HRMS, Product Related, Compensation, Utilities, Compensation Chart Pagelets, Compensation Chart Pagelets).

Compensation Chart Pagelets

Component: WCS_ECM_MSS

Description: Compensation MSS

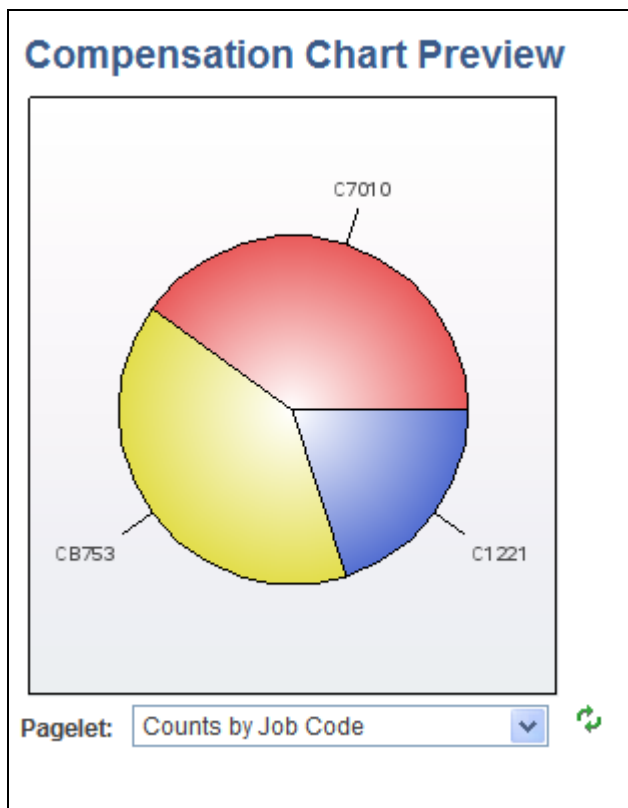
Available Pagelets		Customize Find <input type="text" value="L21"/>	First <input type="button" value="◀"/>	1-8 of 8	Last <input type="button" value="▶"/>
*Pagelet ID	Pagelet Title	Default			
<input type="text" value="WCS_AMT_SAL_TYPE"/>	Amounts by Salary Type	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_COUNT_JOBCODE"/>	Counts by Job Code	<input checked="" type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_COUNT_MIDPOINT"/>	Counts by Midpoint	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_COUNT_RANGE"/>	Counts by Range	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_COUNT_STATUS"/>	Counts by Group Status	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_SAL_EPR"/>	Salary Increase by Performance	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_SAL_RVWPOINTS"/>	Salary Increase by Points	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>
<input type="text" value="WCS_SAL_RVWRATING"/>	Salary Increase by Rating	<input type="checkbox"/>	<input type="button" value="+"/>		<input type="button" value="-"/>

Compensation Chart Pagelets

The PeopleSoft Enterprise eCompensation Manager Desktop application delivers eight different pagelets. You must select one pagelet as the default in the Default column. If you select more than one pagelet as the default, the system displays an error message when you click Save.

Previewing Chart Pagelets

Access the Compensation Chart Preview page (Set Up HRMS, Product Related, Compensation, Utilities, Compensation Chart Preview, Compensation Chart Preview).



Compensation Chart Preview page

Select the pagelet that you want to preview. After you select a new pagelet to preview, click the Refresh button to display the chart.

Note. The Compensation Chart Preview page was created to demonstrate what a chart will look like visually. The chart's data points are based on demo data and not related to any actual cycle data.

Defining, Configuring, and Maintaining Compensation Alerts

This section discusses how to:

- Define compensation alerts.
- Maintain the alerts text catalog.
- Run the alerts maintenance process.

Pages Used to Define, Configure, and Maintain Compensation Alerts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compensation Alert Definition	WCS_ALERT_SETUP	Set Up HRMS, Product Related, Compensation, Utilities, Compensation Alert Definition, Compensation Alert Definition	Define and configure compensation alerts for use within the eCompensation Manager Self Service functionality.
Maintain Text Catalog page	HR_SSTEXT_TEXT	Set Up HRMS, Product Related, Compensation, Utilities, Compensation Alert Text, Maintain Text Catalog	Create or update the message text used for compensation alerts within the eCompensation Manager Self Service functionality.
Alerts Maintenance	WCS_ALERTS_MAINT	Set Up HRMS, Product Related, Compensation, Utilities, Compensation Alert Maintenance, Alerts Maintenance	Report on or purge existing employee compensation alerts.

Define Compensation Alerts

Access the Compensation Alert Definition page (Set Up HRMS, Product Related, Compensation, Utilities, Compensation Alert Definition, Compensation Alert Definition).

Compensation Alert Definition						
Alert Definitions						Customize Find
Parameters		Text Catalog Keys				
*Event Code	*Status	Allow Delete	Allow Duplicates	Preferred Display		
BLT	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+ -	
CAN	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+ -	
CMP	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notify	+ -	
CNF	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Review	+ -	
FIN	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+ -	
MGA	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Update	+ -	
OPN	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notify	+ -	
PSB	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+ -	
SUB	Inactive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Update	+ -	

Compensation Alert Definition page

The PeopleSoft Enterprise eCompensation Manager Desktop application delivers 18 alert definitions. The Compensation Alert Definition component, however, is strictly intended for the maintenance of the valid alert message definitions that are available for processing. The records in the tables are delivered as default data and should only be changed or manipulated in cases where your implementation demands it.

Parameters Tab

Event Code Displays the code that determines which event needs to be raised.

Status Select *Active* to activate a specific event for processing.

Allow Delete and Allow Duplicates Select the Allow Delete check box to allow users to delete rows. If the Allow Duplicate check box has also been selected, then duplicate alert messages are supported. If the Allow Duplicates check box is deselected, the system replaces any existing message.

Preferred Display Select either *Default*, *Notify*, *Review*, or *Update* to indicate the preferred time period the alert should be available for display. Please note that this *preferred* period may not be defined depending on how the cycle definition has been set up.

These display periods relate directly back to the same periods that have been set within the Administer Compensation Cycle component, which was created by the administrator. The actual range of date are specific to each cycle.

Text Catalog Keys

Text catalog keys are used to populate the message text for the alert. The Object owner identifier, Sub ID and Text ID fields all contain existing prompt values currently in use when setting up the HR Test Catalog.

Maintaining the Alerts Text Catalog

Access the Maintain Text Catalog page (Set Up HRMS, Product Related, Compensation, Utilities, Compensation Alert Text, Maintain Text Catalog).

Maintain Text Catalog
Workforce Comp Solutions

Sub ID: ALRT

Text ID: MESSAGE Usage: Page Instructions

Description: Alert Message Text for eCompensation Manager Self Service

Text Entries Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

Context Keys and Text Find | View All First 1 of 9 Last

Key 1: BLT

Budget ID:

Access Type:

A compensation cycle has been initiated and will be available soon for your review.

[View/Edit as HTML](#)

Maintain Text Catalog page

The PeopleSoft Enterprise eCompensation Manager Desktop application delivers nine context keys that you can configure for your Manager Self Service pages.

Usage

Select one of these values based on how the text will be used:

- *Email Body*
- *Email Subject*
- *Error/Warning*
- *Field Label*
- *Grid/Scroll Heading*
- *Groupbox Title*
- *Hyperlink/Button*
- *Page Instructions*
- *Page Title*

Event Code (Key 1)

Select one of these event codes:

- *APR* - Group Status set to Approved
- *BIP* - Cycle Status set Building
- *BLT* - Cycle status set to Built.
- *CAN* - Cycle status set to Cancelled.
- *CLC* - Group status set to Calculated.
- *CMP* - Group status set to Completed.
- *CNA* - Confirmer is added to a group.
- *CNF* - Group status set to Confirmed.
- *DEF* - Cycle Status set to Defined.
- *FIN* - Cycle Status set to Finalized.
- *INP* - Group Status to In Progress.
- *MGA* - Manager added to a group.
- *OPN* - Cycle status set to Open.
- *PSB* - Group status Pushed Back.
- *RMV* - Individual is removed a group.
- *RTL* - Group status set to Ready.
- *RVA* - Reviewer added to a group.
- *SUB* - Group status set to Submitted.

- Budget ID** Select a cycle ID with which you want to associate the text.
- Access Type** Select one of these values to indicate the role that should have access to the text message:
- *Confirmer*
 - *Reviewer*
 - *Submitter*

Running the Alerts Maintenance Process

Access the Alerts Maintenance page (Set Up HRMS, Product Related, Compensation, Utilities, Compensation Alert Maintenance, Alerts Maintenance).

The screenshot shows the Alerts Maintenance page interface. At the top, there is a tab labeled 'Alerts Maintenance'. Below the tab, the 'Run Control ID' is set to 'PS'. To the right, there are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The main section is titled 'Parameters' and contains the following fields:

- *Action: A dropdown menu with 'Purge Alerts' selected.
- *Cycle ID: A text input field containing 'HXCMPANA1' with a search icon.
- *Start Date: A date input field containing '01/01/2008' with a search icon.
- Tree Node Number: An empty text input field.
- Access Type: A dropdown menu with 'Comp Adn' selected.
- Employee ID: An empty text input field.

Alerts Maintenance page

- Action** Select one of these values to indicate the action you want the system to take regarding the disposition of the alerts:
- *Log Alerts*
 - *Log Expired Alerts*
 - *Purge Alerts*
 - *Purge Expired Alerts*

Cycle ID Select a cycle for which you want the system to take action.

Start Date	Select the date upon which you want the system to start an action.
Tree Node Number	Enter the tree node number upon which you want the system to take action.
Access Type	Select one of these values to indicate which access type upon which you want the system to take action: <ul style="list-style-type: none">• <i>Comp Admin</i>• <i>Confirmer</i>• <i>Reviewer</i>• <i>Submitter</i>
Employee ID	Enter the employee ID upon which you want the system to take action.

Chapter 5

Administering Compensation Cycles

This chapter provides an overview on cycle administration and the cycle load process and discusses how to:

- Administer compensation cycles.
- Administer cycle roles.
- Manually distribute funding information for cash, non-cash and stock awards.

Understanding Cycle Administration

The administration of a particular cycle instance is performed by the compensation administrator within a single component. While simple tasks are performed within the Administer Cycle component, the more complex tasks are performed by clicking buttons that link to other components.

The main purpose of the Administer Cycle component is to provide a single point from which an administrator can manage all phases of a compensation cycle and to provide summary analytics to monitor the progress of managers.

You track the phases of a compensation cycle using the cycle status code. As the compensation cycle proceeds, the administrator performs the tasks illustrated in the diagram shown below. In many cases these tasks are, in turn, dependent upon each other and may modify the cycle status code.

The Cycle Build and Calculation Application Engine populates a series of processing tables that are used to store a snapshot of the employee demographic data, salary proposals, variable compensation proposals, funding information for each of the group nodes defined in the tree hierarchy, and the default role access.

This process also performs a series of validations and edits to identify any errors in building your compensation cycle. When the Cycle Build process successfully builds your compensation cycle, the system sets the status of the compensation cycle to *Built*. After reviewing the results of your built compensation cycle, you may find that you need to make adjustments to your compensation cycle definition. You can simply cancel the compensation cycle, adjust the compensation cycle definition, and run the Cycle Build process again.

Before you run the Cycle Build process, make sure that:

- ePerformance reviews are in a *Complete* status.
- Variable compensation has been calculated and is in an *Initial* status.
- The Proration Exception table is populated.
- Employee changes to job history are accurate for any type of proration calculation.

Before you open the compensation cycle to managers from the Administer Cycle page you must enter funding information on the Compensation Cycle Definition - Salary page. Use this page to enter a description for the salary plan that you want managers to see on the Manager Self-Service pages. You can also use the Funding Percent field to enter the total funding percent by which you would allow a manager to adjust salaries in their department.

Additionally, you can use the Minimum Percent and Maximum Percent fields to enter the minimum and maximum percent by which you would allow a manager to adjust an employee's salary. If you want to enable managers to override the calculated funding amount, select the Discretionary check box. To set the default proposal to the calculated funded amount, select the Default Proposal to Funded check box. Then run the Compensation Cycle Build process (WCS_ECMBUILD),

Note. If you have multiple languages turned on, you need to initiate the Update Cycle Languages (WCS_ECM_LANG) process after running the Compensation Cycle Build process. Doing this supports language translation for the Tree Node description. To access the Update Cycle Languages page, select Compensation, Compensation Cycles, Update Cycle Languages.

See Chapter 5, "Administering Compensation Cycles," Administer the Cycle Process Flow, page 64.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation*, "Calculating Allocations and Awards."

Understanding the Cycle Load Process

The Compensation Cycle Load process loads awards and salary updates from the Compensation Cycle processing tables. For this to happen managers should have entered and submitted their proposals through the Allocate Compensation page in eCompensation Manager Desktop. After the compensation administrator has confirmed the accuracy of the proposals or they have been approved through the AWE process, the compensation administrator has to mark the group *Ready to Load*.

The Load Awards and Salary Updates process is an Application Engine program that is run via the PeopleSoft Process Scheduler. It is launched via a standard run control component. In general, access to this component should be controlled as the new Job Data Salary change transactions that will be created need to be coordinated with benefits and payroll.

Note. The Load process sets the group node status in either a *Complete* or *Complete with Error* status. The Load Awards and Salary Update process will only process a group node that is in the *Ready to Load* status once. However, as group nodes move to a *Ready to Load* status, you can continue to run the Load Award and Salary Update process for your Compensation Cycle to process those nodes.

Step	Description
Validate Run Control Parameters	The system obtains run control parameters as well as the cycle status for the designated cycle. If the cycle status is not <i>Open</i> , the system perform exits to abort the process.
Populate Configuration Row Sets	The system creates stand alone component level row sets to hold the variable compensation, salary, and salary action cycle configurations. For non-cash variable compensation plans, the system obtains the current valuation per unit value.

Step	Description
Create Direct Report Group Row Set	The system selects all direct report group rollup nodes where the group status is equal to <i>Ready To Load</i> . For each row, the system retrieves information from the Process Salary Increases, Process Awards and Update Group Status sections.
Process Salary Increases	<p>For each employee salary plan row within the selected group, which is ordered by employee ID, record number, plan sequence and reason sequence, the system:</p> <ol style="list-style-type: none"> 1. Obtains the current compensation row for the compensation rate code. 2. Annualizes the current compensation rate. 3. Converts eCompensation increase amounts to the currency code using cycle currency conversion parameters. 4. Adds converted eCompensation increase to the current annualized compensation rate, while obtaining the new annualized compensation rate. 5. Converts the new annualized compensation rate to the current compensation frequency, while obtaining the new compensation rate. 6. Inserts new Job Data rows. 7. Makes the effective date equal to the planned effective date from the cycle definition. 8. Makes the effective sequence equal to the current effective sequence plus 1 if the current effective date is equal to the planned effective date, otherwise it's zero. 9. Makes the action equal to the action from the corresponding Salary Action Cycle row. 10. Makes the reason equal to the reason from the corresponding Salary Action Cycle row. 11. Updates the appropriate Compensation rows with the new compensation rate. 12. Invokes the Calculate Compensation button. 13. Saves. <p>Note. The system sets the row status to <i>Error</i> if the component interface fails for any reason. If the save is successful, the system sets the row status to <i>Processed</i>.</p>

Step	Description
Process VC Awards	<p>For each eCompensation Variable Compensation row within the selected group, which is ordered by employee ID, record number and variable compensation plan ID, the system updates the Variable Compensation Award table with appropriate amounts as follows:</p> <ol style="list-style-type: none"> 1. Obtains currency code from the corresponding Variable Compensation Award row. 2. Converts the eCompensation adjusted and proposed award amounts from the eCompensation currency code to the variable compensation currency code using the cycle currency conversion parameters if the plan is monetary. 3. Makes the variable compensation adjusted award equal to the converted eCompensation adjusted award. 4. Makes the variable compensation actual award amount equal to the converted eCompensation proposed award, if the plan is monetary. 5. Makes the variable compensation adjusted actual award unit equal to the eCompensation proposed award, if the plan is non-monetary. 6. Makes the variable compensation award value equal to the eCompensation proposed award time, which corresponds to the valuation per unit value, if the plan is non-monetary. 7. Sets the variable compensation award status to <i>Approved</i> if the eCompensation proposed amount is greater than 0; otherwise the system sets the status to <i>Cancelled</i>. 8. Sets the row status to <i>Processed</i>. <p>Note. If a row is excluded, the system sets the proposal status to <i>Bypassed</i> and ends further processing on the row. If there is not a corresponding row in the Variable Compensation Award table for the plan, payout period, employee ID, and employee record, the system sets the proposal status to <i>Error</i>, logs the action, and ends further processing on the row.</p>
Update Group Status	Sets the group status to <i>Complete</i> .
Terminate	Writes totals to log and closes the process.

Administering Compensation Cycles

This section discusses how to:

- Administer the cycle process flow.
- Define access rules.
- View the cycle summary.

- Run the cycle build and calculation process.
- Manage compensation cycle transactions.
- Review and update transactions for individuals.
- Run the load salary updates and awards process.

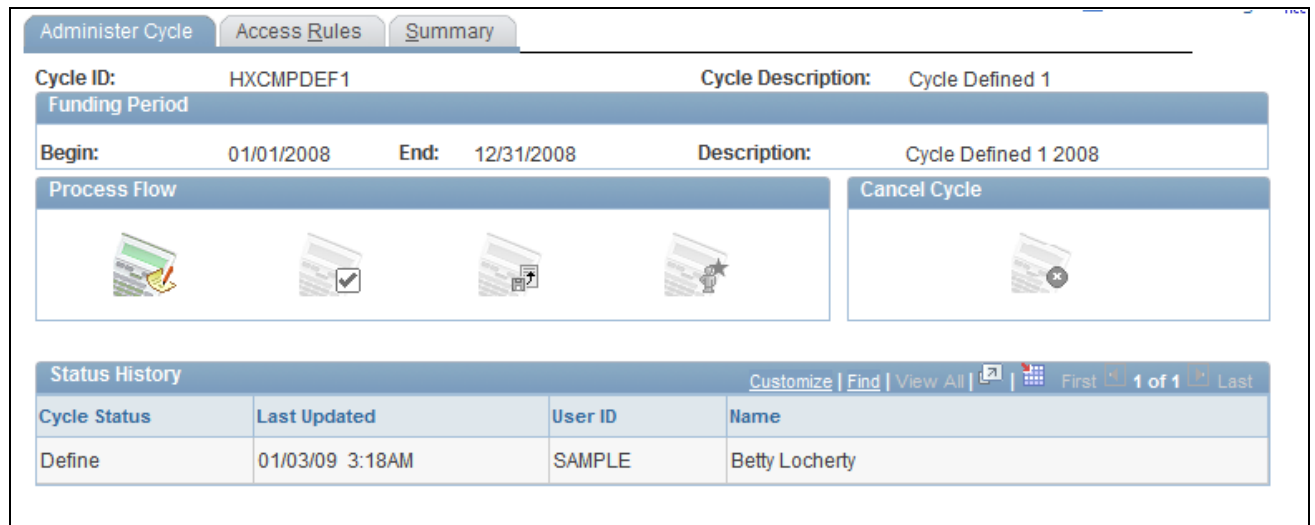
Pages Used to Administer Compensation Cycles

Page Name	Definition Name	Navigation	Usage
Administer Cycle	WCS_ECM_CYC_ADM	Compensation, Compensation Cycles, Administer Cycle, Administer Cycle	This page is the access point to build, open, load, close, and cancel compensation cycles,
Access Rules	WCS_ECM_CYC_PDS	Compensation, Compensation Cycles, Administer Cycle, Access Rules, Access Rules	Use this page to set the time periods in which managers can review, update, and be notified of changes in the compensation cycle.
Summary	WCS_ECM_CYC_SUM	Compensation, Compensation Cycles, Administer Cycle, Summary, Summary	Use this page to view a summary of the cycle, including funding period, status, currency, funding amounts, funding percentages, headcounts, and calculated total salaries.
Build Cycle	WCS_ECMBUILD_RCTL	Click the Build button on the Administer Cycle page.	Use this page to run the Cycle Build Application Engine program.
Load Salary Updates and Awards	WCS_ECMLOAD_RCTL	<ul style="list-style-type: none"> • Compensation, Compensation Cycles, Load Salary Updates and Awards, Load Salary Updates and Awards • Click the Load button on the Administer Cycle page. 	Use this page to run the Load Salary Updates and Awards Application Engine program.
Manage Cycle Transactions	WCS_ECM_MSS_SUM	Compensation, Compensation Cycles, Manage Cycle Transactions, Manage Cycle Transactions	Enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.

Page Name	Definition Name	Navigation	Usage
Manage Cycle Transactions - Direct Reports	WCS_ECM_MSS_DET	Click the link under the Name field on the main Manage Cycle Transactions page.	Enter compensation proposal changes for individuals.

Administer the Cycle Process Flow

Access the Administer Cycle page (Compensation, Compensation Cycles, Administer Cycle, Administer Cycle).



Administer Cycle page

Process Flow



Click the Build button to access the Build Cycle page. The system enables this button only if the cycle status is *Defined* or *Cancelled*.



Click the Open button to access the Administer Cycles Confirmation page and open funding for the cycle. The system enables this button only if the cycle status is *Built*. The system displays a confirmation page with an appropriate message. If the user clicks OK, the system sets the current cycle status to *Open*.



Click the Load button to access the Load Salary Updates and Awards page. The system enables this button only if the cycle status is *Open* and one or more group statuses are set to *Ready to Load*.



The system enables the Close button if the cycle status is *Open* and all groups in the cycle have a status of *Complete* or *Complete with Errors*. Click the Close button to access a confirmation page with an appropriate message. If the user clicks OK, the system sets the current cycle status to *Closed*.



The system enables this button only if the cycle status is *Open* or *Calculated*.

Click the Cancel button to set the cycle status to *Cancelled*. In addition, the system sets the date the cycle was cancelled to the current date. It also sets the By field to the ID of the person signed on to the system.

Additionally, the system checks that no groups within the cycle have a group status code of *Complete*. If there are one or more groups that have a group status code of *Complete*, the system displays an error message. You may also see a warning message if the cycle needs to be recalculated, In this case click OK to continue or Cancel to stop processing.

Status History

This grid provides you with the current and previous cycle statuses, the dates the cycle were last updated, the IDs of the users, and the names of the users who updated the compensation cycle.

Defining Access Rules

Access the Access Rules page (Compensation, Compensation Cycles, Administer Cycle, Access Rules, Access Rules).

The screenshot shows the 'Access Rules' page with the following details:

- Navigation tabs: Administer Cycle, Access Rules, Summary
- Cycle ID: HXCMPDEF1
- Cycle Description: Cycle Defined 1
- Funding Period:
 - Begin: 01/01/2008
 - End: 12/31/2008
 - Description: Cycle Defined 1 2008
- Cycle Status: Define
- Manager Access Periods table:

*Event Display Code	*Start Date	*End Date		
Notification Period	12/01/2007	12/31/2007	+	-
Review Period	01/01/2008	12/31/2008	+	-
Update Period	01/01/2009	01/15/2009	+	-
Default	01/01/2008	12/31/2008	+	-

Access Rules page

Manager Access Periods

Event Display Code Select the event for which you want to set a start and end date. Values include:

- *Default*
- *Notification Period*
- *Review Period*
- *Update Period*

Start Date and **End Date** Enter the start and end dates for each event that you add to this page.

Viewing the Cycle Summary

Access the Summary page (Compensation, Compensation Cycles, Administer Cycle, Summary, Summary).

Administer Cycle		Access Rules		Summary						
Cycle ID: WCS_BUILT			Cycle Description: WCS YR2008 Department Built							
Funding Period										
Begin:	01/01/2008	End:	12/31/2008	Description:	Year 2008					
Cycle Status: Built			Currency Code: USD							
Funding Overview for Salary Plans										
Description	Calculated Headcount	Calculated Total Salaries	Calculated Amount	Calculated Percent	Adjusted Headcount	Adjusted Total Salaries	Funded Amount	Funded Percent	Proposed Amount	Proposed Percent
Merit	451	142,729,824.77	7,136,491.23	5.00	451	142,729,824.77	7,136,491.23	5.00	0.00	0.00

Summary page

Funding Overview for Salary Plans

After the cycle is built, this grid provides information regarding headcount, salaries, calculated amounts and percents, funded amounts and percents, and proposed amounts and percents.

Calculated Percent This field is equal to the calculated amount divided by the calculated total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.

Funded Percent This field is equal to the funded amount divided by the adjusted total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.

Proposed Percent This field is equal to the proposed amount divided by the adjusted total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.

Running the Cycle Build and Calculation Process

Access the Build Cycle page (click the Build button on the Administer Cycle page).

Build Cycle

Run Control ID: HXCMPDEF1_2008-01-01 [Report Manager](#) [Process Monitor](#)

Report Request Parameters

Cycle ID:

Funding Period Begin: Status: Defined

Recalculate Cycle

Build Cycle page

Click the Run button to access the Process Scheduler Request page and launch the Compensation Cycle Build Application Engine.

This process updates the cycle status, deletes old data, reads general parameters, resolves group definitions, creates employee demographic data, creates direct report nodes, create rollup nodes, processes salary plans, processes variable compensation plan information, creates an access table, and updates the cycle status log file.

Cycle ID Select the cycle for which you want to run the cycle build and calculation process.

Funding Period Begin Select the begin date of the funding period for which you want to run the cycle build and calculation process.

Recalculate Cycle Select this check box if you want the system to recalculate a cycle that has already been built and calculated

Managing Compensation Cycle Transactions

Access the Manage Cycle Transactions page (Compensation, Compensation Cycles, Manage Cycle Transactions, Manage Cycle Transactions).

Manage Cycle Transactions

Betty Locherty
Current Role: Compensation Administrator

▼ Instructions
Enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.

Department ID: HXCMPDEPT6 Currency Code: USD US Dollar
Name: eCompensation - Department 6
Status: Calculated

HXCMPDEPT6

Organization Summary Data

Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
SAL_PLAN_3	14	1,390,000.00	83,400,000.00	83,200,000.00	200,000.00
SAL_PLAN_4	14	1,390,000.00	84,750,000.00	84,750,000.00	0.00
VC 88	14	1,390,000.00	420,000,000.00	420,000,000.00	0.00

Manage Cycle Transactions page (1 of 2)

Adjustment:

Direct Reports

Name	Exclude	Employee ID	Current Salary	Change Amount	Performance Rating
Rov,Siddharth	<input type="checkbox"/>	HXCMPDEPT7	95,000.00	5,700,000.00	U

Indirect Reports

Department ID	Group Status	Name	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status
HXCMPDEPT7	In Progress	eCompensation - Department 7	200,000.00	1,295,000.00	77,700,000.00	6.00	77,500,000.00	5.98	04/0

Manage Cycle Transactions page (2 of 2)

Save for Later Click this button if you want to save any changes you may have made and review them later. This will update the status of the group proposals to *In Progress*. The system enables this button based on the role of the user and if the group status of the proposal is *Calculated*, *In Progress*, or *Pushed Back*.

Discard Changes Click this button if you want to discard any changes you may have made. The system enables this button based on the role of the user and if the group status of the proposal is *Calculated*, *In Progress*, or *Pushed Back*.

Submit Click this button to submit any changes you may have made to the upper node or one node up for processing. This will update the group status to *Submitted*. The system enables this button if the user has the Submitter role access and the group status of the proposal is *Calculated*, *In Progress*, or *Pushed Back*.

Push Back Click this button to send the proposal back to the last person who had approval authority. The system enables this button based on the role of the user and if the group status is *Submitted*.

Note. If you define your Compensation Cycle to use the Approval Workflow Engine (AWE), the system does not enable the Push Back button. This is managed within AWE.

Confirm Click this button to confirm group proposals. The system enables this button based on the role of the user and if the group status is *Submitted*.

Mark Ready to Load Click this button to change the status of the proposal to *Ready to Load*. The system enables this button if the user has been assigned the Compensation Administrator role and the group status has reached the *Confirmed* status.

Organization Summary Data

This group box describes or lists the name of the plan, the total number of eligible employees in the plan, the total amount of eligible salaries, the total amount that has been funded for the plan, the total proposed amount for the compensation cycle, and the balance (total funded amount – total proposed amount). Organization summary data represents a manager's entire organization, including totals from direct and indirect reports.

If the manager has direct reports, the system displays an additional tab called Direct Reports next to the organizational summary. The system does this to tie the organizational summary numbers back to the employees displayed in the lower grid.

Direct Reports

This group box describes or lists the names of individuals, indicates if an individual was excluded from the compensation cycle, lists the current salaries of individuals, and provides a field that you can use to adjust the amount of the proposed change in compensation.

Change Amount Enter the amount by which you want to change the individual's compensation and then click the Save for Later button.

The system updates the amount in the Total Proposed Amount field in the Organization Summary Data group box and recalculates the amount in the Balance field.

Indirect Reports

Depending on which method that you used to set up your trees (position-based, supervisor based, or tree based), this group box describes or lists basic information regarding the node and when it was changed. It also displays the total amount of eligible salaries, the total amount that has been funded, the total proposed amount for the compensation cycle, the proposed percent, the funded percent, and the balance (total funded amount – total proposed amount).

Reviewing and Updating Transactions for Individuals

Access the Manage Cycle Transactions - Direct Reports page (click the link under the Name field on the main Manage Cycle Transactions page).

Manage Cycle Transactions
Direct Reports

Betty Locherty
Current Role: Compensation Administrator

Save Discard Return

Name: Sonia Willson
Job Title: ecompensation Job code

Employee Information Customize | Find | First 1-2 of 2 Last

Field Name	Value
Employee ID:	HXCMPMSS71
Job Code:	HXCMP1

Salary Proposals Customize | Find | First 1-2 of 2 Last

Plan	Exclude	Currency	Current Salary	Prorate Factor	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Other Changes	Proposed Annual Rate	Proposed Annual Percent	Other Compensation	Tc Pt Rz
Annual merit	<input type="checkbox"/>	USD	49,700.00	1.000000	4,970.000000	10.00	4,970.000000	10.00	2,982.00	57,652.00	10.00	0.00	
Adjustment	<input type="checkbox"/>	USD	49,700.00	1.000000	2,982.000000	6.00	2,982.000000	6.00	4,970.00	57,652.00	6.00	0.00	

Other Proposals Customize | Find | First 1 of 1 Last

Plan	Exclude	Currency	Current Salary	Target Award	Target Percent	Funded Award	Funded Percent	Proposed Award	Modifier	Other Cash Awards	Total Cash Awards	Funding Balance
Bonus	<input type="checkbox"/>	USD	49,700.00	20,000.000000	40.24	20,000.000000	40.24	20,000.000000	100.00	0.00	20,000.00	

Manage Cycle Transactions - Direct Reports page (1 of 2)

Salary History Customize | Find | First 1-2 of 2 Last

Employee ID	Record	Date	Action	Reason	Currency Code	Change Amount	Change Percent	Annual	Monthly
HXCMPMSS71	0	01/01/1990	Hire		USD	0.00	0.00	35,000.00	2,916.66
HXCMPMSS71	0	01/01/2000	Pay Rate Change		USD	14,700.00	42.00	49,700.00	4,141.66

Variable Compensation History Customize | Find | First 1 of 1 Last

Award Date	VC Plan ID	Description	Group ID	Award Value
12/31/2007	HXCMPMSS1	VC DATA FOR COMP MSS	HXCMPMSSGRP2	20,000.000000

Performance History Customize | Find | First 1 of 1 Last

Date	Manager Name	Document Type
12/31/2008	John Sear	HXCMPDT1

Manage Cycle Transactions - Direct Reports page (2 of 2)

Use this page to enter compensation changes for your individual direct reports.

Save Click this button to save any changes you made have made to the proposal.

- Discard** Click this button to discard any changes you made have made to the proposal.
- Return** Click this button to return to the Manage Cycle Transactions page for the group.

Salary Proposals

Use this group box to review any changes being proposed to the employee's compensation. You can choose to exclude the employee from the process by selecting the Exclude check box. You can also enter a specific amount in the Change Amount field or decide to enter a percentage in the Proposed Percent field and let the system calculate the amount when you click Save.

Other Proposals

Use this group box to review any additional changes being proposed to the employee's compensation. You can choose to exclude the employee from the process by selecting the Exclude check box. You can also enter a specific amount in the Proposed Award field or decide to enter a number in the Modifier field and let the system calculate the amount when you click Save.

Note. Only an administrator can select the Exclude check box. On the Manager Self-Service pages, users cannot edit this field when it is displayed. An administrator can also use the Compensation Cycle Build process to exclude employees from the cycle.

Salary History

Use this group box to review the employee's salary history, including date, action reason, change amount, change percent, annual compensation, and monthly compensation.

Award History

If the system displays the Award History group box, it displays information regarding the variable compensation award history of the employee.

Performance History

If you select ePerformance integration, the system displays a Performance History group box, which displays information regarding dates, manager names, document types, and performance ratings.

Running the Load Salary Updates and Awards Process

Access the Load Salary Updates and Awards page (Compensation, Compensation Cycles, Load Salary Updates and Awards, Load Salary Updates and Awards).

Load Salary Updates and Awards

Run Control ID: HXCMPOPN4_2008-01-01 [Report Manager](#) [Process Monitor](#)

Report Request Parameters

Cycle ID:	<input type="text" value="HXCMPOPN4"/> <input type="button" value="🔍"/>	
Funding Period Begin:	<input type="text" value="01/01/2008"/> <input type="button" value="🔍"/>	Status: Opened

Load Salary Updates and Awards page

Click the Run button to access the Process Scheduler Request page and launch the Compensation Cycle Load Application Engine.

This process validates the run control parameters, populates configuration rowsets, creates direct report group rowsets, processes salary increases, processes variable compensation awards, and updates the group status to *Complete*.

Cycle ID Select the cycle for which you want to load salary updates and award information.

Funding Period Begin Select the begin date of the funding period for which you want to load salary updates and award information.

Administering Cycle Roles

This section provides an overview of cycle roles and discusses how to administer cycle roles.

Understanding Cycle Roles

You use this component to capture information necessary to control access to particular compensation cycles by users that have manager and compensation administrator roles. The component should, however, be accessible only to compensation administrators.

Note. To access this component, the cycle must be in the *Built* or *Open* status.

Page Used to Manage Cycle Roles

Page Name	Definition Name	Navigation	Usage
Administer Cycle Roles	WCS_ECM_CYC_ROL	Compensation, Compensation Cycles, Administer Cycle Roles, Administer Cycle Roles	Apply or modify compensation roles for groups within a compensation cycle.

Administering Cycle Roles

Access the Administer Cycle Roles page (Compensation, Compensation Cycles, Administer Cycle Roles, Administer Cycle Roles).

Administer Cycle Roles

Cycle ID: HXCMPMSS1 Cycle Description: HXCMPMSSBAT

Funding Period

Begin: 01/01/2008 End: 12/31/2008 Description: HXCMPMSSBAT

Hierarchy Customize | Find | View All | First 1-5 of 6 Last

Empl ID and Record	Total Employees	Number of Assignments	Status
[-] Priya Harirs	63	2	Calculate
Comp Admin Group	1	0	Calculate
[+] Simon Willson	36	1	Calculate
[+] Kenneth Andrews	11	1	Confirm
[+] Roanne Williams	4	1	Submit

Priya Harirs Customize | Find | View All | First 1-2 of 2 Last

Employee ID	Name	Owner	*Access Type	Delegator ID	Name
HXCMPMSS30	Priya Harirs	<input checked="" type="checkbox"/>	Submitter		
KU0007	Betty Locherty	<input type="checkbox"/>	Comp Admin		

Administer Cycle Roles page

Funding Period

This group box displays the begin and end dates of the cycle and includes a description.

Hierarchy

This group box lists the total number of employees for each manager, the number of employees that have been assigned access roles, and the status of the cycle for which the manager is responsible. Use the plus and minus symbols to select the reporting group that you want to view.

<eCompensation Department>, <Manager Name> or <Position Number>

The title of the grid column depends on the type of tree that was used to create the cycle. This group box displays a list of managers and their corresponding roles from the Cycle Access table. The access table is pre-populated when the Cycle Calculation process is run with the manager of each group. The system allows you to add and delete rows since multiple employees can have access to the same group.

Employee ID	Displays the employee ID of the individual.
	Note. The manager is usually the individual who is designated as the owner of the group.
Name	Displays the name of the individual.
Owner	Select this check box to indicate who is administering the roles for the reporting group. This check box is used mainly for informational purposes only. Individuals who are designated as <i>owner</i> do not get audited when an administrator updates the cycle.
Access Type	Select the role that you want each individual to have for the compensation cycle. The system writes any changes to the Audit table if anyone other than the owner enters and saves an updated proposal amount.
	Values include:
	<ul style="list-style-type: none"> • <i>Comp Admin</i> (compensation administrator): The compensation administrator is responsible for the compensation process including cycle definition, funding, proposal submission and compensation updates. This role has view and update capabilities at all levels, including the ability to flag approved groups for implementation. • <i>Confirmer</i>: The confirmer role provides an individual with the ability to confirm submitted proposals for the designated groups within the organizational chain. If you are use AWE, the Confirmer role will not be available. • <i>Reviewer</i>: The person having this role has view-only access to specific groups. Update capabilities are not available to the reviewer role. • <i>Submitter</i>: The submitter role provides an individual with the ability to submit or push back proposals for the designated groups within the organizational chain. When changes are complete, the individual submits requests for approval. The submitted requests are then routed for approval.

Manually Distributing Funding Information for Cash, Non-Cash and Stock Awards

This section provides an overview on manual funding distribution and discusses how to:

- Enter funding information for cycles by group.

- Enter funding information for individuals.
- Enter funding information for manually funded plans.

Understanding Manual Funding Distribution

This component is used to manually enter cash, non-cash, and stock award data for variable compensation plans that have been configured with the funding calculation set to *Manual*. The pages are display only unless the Cycle Status is equal to *Defined* or *Canceled*.

Pages Used to Manually Distribute Funding Information

Page Name	Definition Name	Navigation	Usage
Fund Cycle by Group	WCS_ECM_CYC_FBG	Compensation, Compensation Cycles, Fund Cycle by Group, Fund Cycle by Group	Modify calculated funding for a group of employees within a compensation cycle.
Fund Cycle by Individual	WCS_ECM_CYC_FBI	<ul style="list-style-type: none"> • Compensation, Compensation Cycles, Fund Cycle by Individual, Fund Cycle by Individual • Click the Employee Name link on the Fund Cycle by Group page. 	Modify calculated funding for an individual employee within a compensation cycle.
Fund Cycle Manual Plans	WCS_ECM_CYC_FMP	Compensation, Compensation Cycles, Fund Cycle Manual Plans, Fund Cycle Manual Plans	Enter funding for groups within a compensation cycle for manually funded variable compensation plans.

Entering Funding Information for Cycles by Group

Access the Fund Cycle by Group page (Compensation, Compensation Cycles, Fund Cycle by Group, Fund Cycle by Group).

Fund Cycle by Group

Cycle ID: HXCMPBLT8 Cycle Description: Cycle Built 8

Funding Period

Begin: 01/01/2008 End: 12/31/2008 Description: Cycle Built 8 2008

Department ID: HXCMPDEPT2 eCompensation - Department 2

Display Name: No Primary Manager Currency Code: USD

SAL_PLAN_1 VC PLAN 10 VC PLAN 11 VC PLAN 14

Funding Summary Customize | Find | First 1-3 of 3 Last

Description	Total Headcount	Total Salaries	Qualified Headcount	Qualified Salaries	Calculated Amount	Calculated Percent	Funded Amount	Funded Percent
Direct Reports	2	100,000.00	2	100,000.00	7,000.00	7.00	7,000.00	7.00
Indirect Reports	5	220,000.00	5	220,000.00	15,400.00	7.00	15,400.00	7.00
Total Reports	7	320,000.00	7	320,000.00	22,400.00	7.00	22,400.00	7.00

Direct Reports Funding Detail Customize | Find | First 1-2 of 2 Last

Name	Employee ID	Employment Record	Exclude	Current Salary	Baseline Percent	Proration Factor	Calculated Amount	Funded Amount	Funded Percent
Kamat,Grish	HXCMPPEE13	0	<input type="checkbox"/>	50,000.00	7.00	1.000000	3,500.00	3,500.00	7.00
Chan,Gary	HXCMPPEE2	0	<input type="checkbox"/>	50,000.00	7.00	1.000000	3,500.00	3,500.00	7.00

Fund Cycle by Group page

Funding Summary

This group box displays the number of direct reports, indirect reports and total reports in the Total Headcount column. It also lists total salaries for each class of employee, the number of employees who qualify to participate in the cycle, their total salaries, the calculated amount, the calculated percent, the funded amount, and the funded percent. To reveal this information for other plans, click the tabs displayed at the top of the group box.

Note. Root node employees (usually managers) are included in the head counts for indirect reports and salaries. However, they should not be able to update their own data. The compensation administrator, however, can exclude top node employee from funding and the cycle. If they do exclude these employees, the compensation administrator can use the Manage Cycle Transactions page to update the proposals for root node employees, as well as the other employees that cannot be associated to any of the tree nodes in the cycle.

Direct Reports Funding Detail

- Name** Displays the name of the employee in the group. Click this link to access the Fund Cycle by Individual page.
- Employee ID** Displays the ID of the employee.
- Employment Record** Displays the employment record of the employee.
- Exclude** Select this check box if you want to exclude this employee from the funding cycle.
- Current Salary** Displays the employee's current salary.
- Baseline Percent** Displays the baseline percent that was established when the cycle was built.

Proration Factor	Displays the proration factor that was established before the cycle was built.
Calculated Amount	Displays the amount of the increase that was calculated based on the employee's current salary, baseline percent, and proration factor.
Funded Amount	Displays the amount that was funded based on the employee's current salary, baseline percent, and proration factor. Use this field to adjust the amount that is displayed in this field.
Funded Percent	Displays the percent of the amount funded in relation to the current salary and funded amount for the employee. To calculate this number the system divides the amount in the employee's Funded Amount field by the amount in the employee's Current Salary field.

Note. Click Save to update the Total Count, Total Salaries and Total Adjusted Amount fields for each plan within the group and groups that own the selected group.

Entering Funding Information for Individuals

Access the Fund Cycle by Individual page (Compensation, Compensation Cycles, Fund Cycle by Individual, Fund Cycle by Individual).


Fund Cycle by Individual

Cycle ID: HXCMPBLT2 **Cycle Description:** Cycle Built 2

Funding Period				
Begin:	01/01/2008	End:	12/31/2008	Description: Cycle Built 2 2008

Department ID: HXCMPDEP10 eCompensation - Department 10

Node Status: Calculate

Individual Data			
Name:	Gary Chan	Job Title:	ecomensation Job code
Employee ID:	HXCMPPEE2	Department:	eCompensation - Department 2
Empl Record:	0	Business Unit:	HXBU1
Last Start Date:	01/01/1990	Location:	eCompensation Location
Empl Status:	Active	Notes:	

Exclude All

Salary Plans				
Exclude	Description	Calculated Amount	Funded Amount	Proposed Amount
<input type="checkbox"/>	SAL_PLAN_1	2,500.00	2,500.00	0.00

Fund Cycle by Individual page

Funding Period

This group box provides the begin and end dates for the cycle as well as a description. The fields in this group box are display only.

Individual Data

This group box provides information about the employee, including Name, Job Title, Employee ID, Department, Empl Record, (employee record) Business Unit, Last Start Date, Location, and Empl Status (employee status).



Click the Note button to access the Notepad page where you can enter additional information regarding the individual and their compensation.

Exclude All

Select this check box if you want to exclude the individual from receiving any additional monies under their salary or award plans for this cycle. The system selects all the Exclude check boxes that appear on the page and prevents users from entering information in the Funded Amount and Funded Award fields.

Salary Plans

Exclude

Select this check box if you want to exclude the individual from receiving any additional monies under their salary plan for this cycle.

Description

Displays a description of the salary plan.

Calculated Amount

Calculated during the cycle build process, this field displays the suggested amount by which you can increase the individual's salary.

Funded Amount

Enter the amount by which you want to increase the individual's salary.

Proposed Amount

This field displays the proposed amount by which you can increase the individual's salary. This figure was determined when the cycle was being built or administered.

Award Plans

This group box displays award plan information for the individual. The fields in this group box are nearly the same as those in the Salary Plans group box. For more information on the fields displayed in this group box, refer to the field descriptions under the Salary Plans section.

Entering Funding information for Manually Funded Plans

Access the Funding Cycle Manual Plans page (Compensation, Compensation Cycles, Fund Cycle Manual Plans, Fund Cycle Manual Plans).

Fund Cycle Manual Plans

Cycle ID: HXCMPBLT5 **Cycle Description:** Cycle Built 5

Funding Period

Begin: 01/01/2008 **End:** 12/31/2008 **Description:** Cycle Built 5 2008

VC Plan 8

Adjusted Funding

Total Qualified Headcount: 7 **Amount to Allocate:**

Total Salaries: 305000.00 **Funding Allocated:** 0.00

Currency Code: USD **Available Funding:** 0.00

Manual Funding Customize | Find | View All | First 1-4 of 4 Last

Department ID	Total Qualified Headcount	Direct Headcount	Total Salaries	Organizational Total Amount	Allocation Amount
+ eCompensation - Department 10	7	0	305000.00		
+ eCompensation - Department 2	7	2	305000.00		<input type="text"/>
eCompensation - Department 5	3	3	120000.00		<input type="text"/>
eCompensation - Department 4	2	2	100000.00		<input type="text"/>

Funding Cycle Manual Plans page

Funding Period

This group box provides the begin and end dates for the cycle as well as a description. The fields in this group box are display only.

Adjusted Funding

This group box provides information about the funding for the cycle, including information about headcounts, salaries, funding, and currency.

Amount to Allocate

Use this field to enter the amount that you want to manually allocate to the departments for the cycle that is displayed. When you click Save or click on an enterable field, the system displays the amount in the Available Funding field.

Funding Allocated

Displays the total funding that was allocated in the Allocation Amount fields in the Manual Funding group box.

Available Funding

Displays the total amount of available funding that remains after the system subtracts the funding allocated amount from the amount to allocate.

Manual Funding

Group Title

Displays the name and the ID of the reporting group. If the group is based on Supervisor, the system displays the employee ID. If the group is based on Department, the system displays the department ID.

Total Qualified Headcount	Displays the total number of employees that are qualified for additional compensation for the reporting group for this cycle.
Direct Headcount	Displays the total number of direct reports that are included in the reporting group for this cycle.
Total Salaries	Displays the total salaried amount provided to employees within each reporting group that is displayed.
Allocation Amount	<p>Enter the amount that you want to allocate to the reporting group to fund employee compensation for the cycle. The system displays the amount in the Funding Allocated field in the Adjusted Funding group box.</p> <p>When additional amounts are added for other groups, the system adds all the amounts you entered to the Funding Allocated field.</p>

Note. To view additional reporting groups that are included in the cycle, click the Show next row button.

Chapter 6

Approvals and Delegations Integration

eCompensation Manager Desktop provides approval and access role delegation transactions that can be implemented to allow an individual to specify a proxy to act on their behalf. For compensation cycles, when an access role is delegated and the proxy accepts the delegation, the system initiates the Maintain Delegated Role Access process to load the proxies into the cycle access roles structure.

Using the Approvals Framework with Compensation allows you to implement your own set of approvals rules. The system enables you to define as many levels of approvals as you want; or you can decide to not have any level of approvals (auto approve).

Compensation delivers an Approval Process ID as system data, which handles Compensation-specific validations and code needed to integrate with AWE. Compensation also delivers a set of functional rules called Approval Definition IDs. These functional rules were created to demonstrate and test the product integration to AWE. You can define your own set of approval rules that fit your own business process needs.

For Delegations the system enables eCompensation Manager Self Service users to delegate tasks regarding compensation. For instance a submitter can provide the ability to delegate their task to someone within or outside their hierarchical organization. In addition, a reviewer can delegate a task to another individual within the organization.

The Allocate Compensation - Select Activities by Cycle page allows you to select an activity for which another individual has given you authority to work on.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation"

Chapter 7

Allocating Compensation Information

This chapter discusses how to:

- Allocate compensation.
- Review and monitor the compensation process.

Allocating Compensation

This section discusses how to:

- Select compensation activities.
- Allocate compensation for direct and indirect reports.
- Allocate compensation for direct reports.
- Allocate compensation for indirect reports.

Pages Used to Allocate Compensation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Allocate Compensation - Select a Compensation Activity	WCS_ECM_MSS_HOME	Manager Self Service, Compensation and Stock, Allocate Compensation, Allocate Compensation - Select a Compensation Activity	Review the status of the compensation cycles for which you have a role. This page displays the compensation cycle, a description of the group associated with the cycle, the role of the manager who accessed the page, and the status of the compensation cycle.

Page Name	Definition Name	Navigation	Usage
Allocate Compensation	WCS_ECM_MSS_SUM	On the Allocate Compensation - Select a Compensation Activity page, click the link associated with the cycle that you want to update.	Use this page to enter changes to the proposed compensation amounts allocated to your direct reports. You can also navigate into any of your indirect groups to review their proposals.
Allocate Compensation - Direct Reports	WCS_ECM_MSS_DET	On the main Allocate Compensation page, click the link associated with the direct report (employee) for which you to change or update compensation information.	Use this page to enter changes to the proposed compensation amounts allocated to your direct reports.
Allocate Compensation (indirect reports)	WCS_ECM_MSS_SUM	On the main Allocate Compensation page, click the link associated with the department that you want to update.	Use this page to enter changes to the proposed compensation amounts allocated to your indirect reports.

Selecting Compensation Activities

Access the Allocate Compensation - Select a Compensation Activity page (Manager Self Service, Compensation and Stock, Allocate Compensation, Allocate Compensation - Select a Compensation Activity).

Allocate Compensation

Select a Compensation Activity

Review and allocate compensation for your Employees.

Mary-Ann Singleton

▼ Instructions

Select the Cycle Name link to perform actions for the activities listed below.

My Compensation Activities Customize Find 			
Cycle Name	Group Name	Role	Status
Year 2008	Business Services	Submitter	Calculated

[Return To Manager Self Service](#)

[Return to Compensation and Stock](#)

Allocate Compensation - Select a Compensation Activity page

Click the link under the Cycle Name column to access the Allocate Compensation page.

Allocating Compensation for Direct and Indirect Reports

Access the Allocate Compensation page (on the Allocate Compensation - Select a Compensation Activity page, click the link associated with the cycle that you want to update).

Allocate Compensation

Mary-Ann Singleton
Current Role: Submitter

Instructions

Enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.

Department ID:	15000	Currency Code:	USD US Dollar
Name:	Business Services	*Display Currency:	USD US Dollar
Status:	Calculated	*Display Individual Data In:	Display Currency

Save for Later
Discard Changes
Submit
Push Back

15000

Organization Summary Data

Organizational Summary My Direct Reports [...]

Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
Annual Merit	14	420,276.20	21,013.810000	0.000000	21,013.810000

Allocate Compensation page (1 of 2)

Merit Increase											
Direct Reports											
Name	Exclude	Employee ID	Employment Record	Add Notes	Current Salary	Prorate Factor	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Other
CPDF.David	<input type="checkbox"/>	FCP104	0		151,299.20	1.000000	7,564.960000	5.00	0.000000	0.00	
CPDF.Ellen	<input type="checkbox"/>	FCP105	0		125,112.00	1.000000	6,255.600000	5.00	0.000000	0.00	
CPDF.Fred	<input type="checkbox"/>	FCP106	0		0.00	1.000000	0.000000	0.00	0.000000	0.00	
Grier.Tanya	<input type="checkbox"/>	L00050	0		0.00	1.000000	0.000000	0.00	0.000000	0.00	
Prasanna.Uswala	<input type="checkbox"/>	L00019	0		0.00	1.000000	0.000000	0.00	0.000000	0.00	
Ravinder.Vijay	<input type="checkbox"/>	L00017	0		0.00	1.000000	0.000000	0.00	0.000000	0.00	
Zink.Jessica	<input type="checkbox"/>	L00012	0		25,625.60	1.000000	1,281.280000	5.00	0.000000	0.00	

Indirect Reports										
Department ID	Group Status	Name	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status	
21400	Calculated	Southern Sales Region	2,842.410000	56,848.20	2,842.410000	5.00	0.000000	0.00	12/	
21300	Calculated	Northern Sales Region	1,352.000000	27,040.00	1,352.000000	5.00	0.000000	0.00	12/	
21100	Calculated	Central Sales Region	0.000000	0.00	0.000000	0.00	0.000000	0.00	12/	
21000	Calculated	Eastern Sales Region	1,717.560000	34,351.20	1,717.560000	5.00	0.000000	0.00	12/	

[Return to Message & Alerts](#)

Allocate Compensation page (2 of 2)

Display Currency

This field comes from the Currency sub-page. The system hides this field, however, if the cycle does not allow currency conversion. The system converts all monetary values from the base currency (stored values) to the selected currency (derived values). There are no cases in which the code converts from one displayed currency to another.

Display Individual Data In

To change the view of the amounts being proposed, select either *Display Currency* or *Paid Currency*.

Save for Later

Click this button if you want to save any changes you may have made and return to them at a later date.

Discard Changes

Click this button if you want to discard any changes you may have made.

Submit

When you click this button, the system sets the group status to *Submitted*. If the application is configured to alert other users to the changed status, it will send out an alert. The system only enables the Submit button if all the indirect groups are marked as *Submitted*.

Push Back

When you click this button, the system sets the group status to *Pushed Back*. If the application is configured to alert other users to the changed status, it will send out an alert. The system only enables the Push Back button for groups that are in a *Submitted* status.

Note. The system hides this button in Funding mode. This button is also hidden if the user has display-only access and if the user is not either the approver or manager of the immediate group.

Confirm

Click this button to confirm and save any changes that may have been made to the proposal. The system displays this button only to those individuals that have Confirmer access role assigned for the selected group node.

Note. The Confirm button is hidden if the AWE framework is enabled.



(view charts)

Click to display the Group Summary Analytics page, which shows a graphical representations of the compensation data contained in the cycle.

Organization Summary Data

This group box displays the name of the plan, the total number of eligible employees, the total number of all eligible salaries, the total funded amount, the total proposed amount, and the balance. To view the same information for your direct reports, click the My Direct Reports tab.

<Plan Name> Direct Reports

Use this fields in this group box to access the Allocate Compensation - Direct Reports page for individuals, add notes, exclude employees from the compensation cycle, and change compensation amounts for individual employees.

Name

To access the Allocate Compensation - Direct Reports page, click the name of the employee under the Name column.



(notes)

Click to access the Notepad page.

Exclude

Select this check box if you want to exclude an employee from the compensation cycle.

Change Amount

Enter the amount by which you want to change the employee's compensation. The system displays the amount in the Total Proposed Amount field in the Organization Summary Data group box when you click out of the field.

As you make additional changes, the system adds the last change to the previous one until you have completed all the changes for the group displayed and saved or submitted the proposal.

In addition, the system updates the amounts in the Balance and the Proposed Percent fields.

Proposed Percent

Enter the percentage by which you want to change the employee's compensation. The system changes the amount in the adjacent Change Amount field, updates the amount in the Total Proposed Amount field, and then either adds or subtracts the amount from the Balance field in the Organization Summary Data group box.

<Plan Name> Indirect Reports

Use this group box to view compensation and group status information for the departments that report to you. To access the Allocate Compensation (indirect reports) page for a particular department, click the ID of the department under the Department ID column.

Allocating Compensation for Direct Reports

Access the Allocate Compensation – Direct Reports page for direct reports (on the main Allocate Compensation page, click the link associated with the direct report that you want to update).

Allocate Compensation

Direct Reports

Mary-Ann Singleton
Current Role: Submitter

Save Discard Return

Name: Tanya Grier
Job Title: Supervisor-Employee Relations

Add Notes

Field Name	Value
Employee ID:	L00050
Employment Record:	0
Last Hire Date:	02/01/1999
Job Code:	850005

Salary Proposals													
Plan	Exclude	Currency	Current Salary	Prorate Factor	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Other Changes	Proposed Annual Rate	Proposed Annual Percent	Other Compensation	Tot Pro Rat
Merit Increase	<input type="checkbox"/>	USD	0.00	1.000000	0.000000	0.00	0.000000	0.00	0.00	0.00	0.00	0.00	0.00

Salary History										
Employee ID	Record	Date	Action	Reason	Currency Code	Change Amount	Change Percent	Annual	Monthly	
L00050	0	06/04/2000	Hire	New Position	USD	0.00	0.00	70,033.60	5,836.13	
L00050	0	10/04/2004	Pay Rate Change	Adjustment	USD	0.00	-100.00	0.00	0.00	

Allocate Compensation – Direct Reports page

The system populates the fields on the page from data residing in the proposal grids on the Direct Report Details page for the individual.

The page also contains additional grids populated with historical data from the Job and Variable Compensation Award tables. The system copies general employee information from selected proposal rows.

The system populates the proposals grids by copying rows from the corresponding direct report grid for the selected employee. If you modify any fields on the page the system copies the information back to the corresponding direct report proposal grid and row. The system enables users to update proposed amounts unless they have display only access.

Note. For specific information regarding the fields displayed on this page, refer to the field descriptions in the previous section.

Allocating Compensation for Indirect Reports

Access the Allocate Compensation page for indirect reports (on the main Allocate Compensation page, click the link associated with the department that you want to update).

Allocate Compensation

Mary-Ann Singleton
Current Role: Submitter

▼ Instructions
Enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.

Department ID: 21400 Currency Code: USD US Dollar
Name: Southern Sales Region *Display Currency: USD US Dollar
Status: Calculated *Display Individual Data In: Display Currency

Save for Later Discard Changes Submit Push Back

15000 > 21400

Organization Summary Data
My Direct Reports

Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
Annual Merit	2	56,848.20	2,842.410000	0.000000	2,842.410000

Merit Increase

Direct Reports

Name	Exclude	Employee ID	Employment Record	Add Notes	Current Salary	Prorate Factor	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Other
DeVita, Carlos	<input type="checkbox"/>	L00032	0		28,412.80	1.000000	1,420.640000	5.00	0.000000	0.00	
Snyder, Vincent	<input type="checkbox"/>	L00046	0		28,435.40	1.000000	1,421.770000	5.00	0.000000	0.00	

Allocate Compensation (Indirect Reports) page

This page displays funded and proposed summary information for each salary plan and variable compensation plan configured within a given cycle. The system computes summary information from indirect reports only. It does not include subgroups. The system also uses this page to display employee detail information. The detail information shown is specific to the selected salary or variable compensation plan. The system enables users to update proposed amounts unless they have display only access.

Note. For specific information regarding the fields displayed on this page, refer to the field descriptions in the Allocating Compensation for Direct and Indirect Reports section.

Chapter 8

Reviewing Employee Compensation

This chapter provides overviews on viewing compensation history and total compensation for employees and discusses how to:

- Review employee compensation.
- Review total compensation for employees.

Viewing Compensation History

Managers use the Compensation History transaction to review or verify an employee's compensation history. The Compensation History page contains these sections:

- Employee Job Information

This section displays the employee's ID number, department, job title, and employee status.

- Salary History

This section lists all salary changes that occurred during the specified time period. You can link to the Salary Change Details page to view details of the salary change.

- Variable Cash Compensation

This section displays each cash award that the employee received through a variable compensation plan.

- Variable Non-Cash Compensation

This section displays information for each non-cash award that the employee received through a variable compensation plan.

- Stock Option Details

This section displays information for each stock option award that the employee received through a variable compensation plan. This information does not appear if PeopleSoft Enterprise Stock Administration is purchased.

- Review Employee Option

This section provides a link to information on stock options granted through Stock Administration when Stock Administration is purchased.

Note. The View in Issued Currency and View in Preferred Currency buttons enable users to toggle between the currency in which the compensation was issued and the currency specified in the user profile.

Viewing Total Compensation for Employees

Managers can view the total compensation for selected employees. If PeopleSoft Enterprise Payroll for North America is installed, the amounts that appear come from Payroll for North America. Otherwise, the amounts come from PeopleSoft Enterprise Human Resources.

Total compensation includes base salary, regular bonus, seniority, stock, monetary awards, non-monetary awards, and ad hoc awards.

The Total Compensation transaction is based on the Total Compensation warehouse, which needs to be prepared to display information in self service.

We provide the Total Compensation Plan (*SSTCPPLAN*) as system data. Your compensation administrator must run the Total Compensation extraction processes on this plan to update compensation information in the warehouse.

Reviewing Employee Compensation

This section lists the pages that are used to review employee compensation.

Pages Used to Review Employee Compensation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compensation History - Select Employee	OPRROWS	Manager Self Service, Compensation and Stock, View Compensation History, Compensation History - Select Employee	Select an employee to access the Compensation History page.
Compensation History	HR_SS_MG_COMP_HIST	Click the employee name link in the Employee Name column on the Select Employee page.	Review or verify an employee's compensation history.
Compensation History - Salary Change Details	HR_SS_MG_SALCG_SEC	Click a date in the Date of Change column on the Compensation History page.	View details of the salary change.

Review Total Compensation for Employees

This section lists the pages that are used to review total compensation for employees.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Report Total Compensation, "Setting Up Total Compensation Reporting Plans"

Pages Used to View Total Compensation

Page Name	Definition Name	Navigation	Usage
Total Compensation - Select Employee	OPRROWS	Manager Self Service, Compensation and Stock, View Total Compensation, Total Compensation - Select Employee	Select an employee to access the Total Compensation page.
Total Compensation	HR_SS_TC_MG_REVIEW	Click the employee name link in the Employee Name column on the Total Compensation - Select Employee page.	Managers use this page to review all compensation information for their direct reports. You can also review all compensation information for employees who report to your direct reports.

Chapter 9

Changing Employee Salaries When No Allocated Budget Exists

This chapter provides an overview of the change employee salary process, lists prerequisites, and discusses how to:

- Change employee salaries when no allocated budget exists.
- Handle errors or warnings.

Understanding the Change Employee Salary Process

eCompensation Manager Desktop provides three self service transactions that improve the efficiency for changing employee salaries:

- Request Ad Hoc Salary Change.
- Approve Ad Hoc Salary Change.
- View Ad Hoc Salary Change Status.

To complete the salary change process, a manager:

1. Accesses the Request Ad Hoc Salary Change page.

The system displays a list of the manager's direct reports.

2. Selects one or more employees.
3. Enters information about the salary change.
4. Submits the request.

The system either updates the job compensation records or sends notifications to the approving managers.

The approving manager:

1. Accesses the Approve Ad Hoc Salary Change page.
2. Approves or denies the salary change for one or more employees.

The details of the salary change cannot be altered. However, the approving manager can enter a comment regarding the salary change.

Note. Using the View Ad Hoc Chg Status page, managers can check on the status of the request. If an administrator needs to process the data, they can access the Workflow Inquiry page.

Prerequisites

Before you can begin the Request Ad Hoc Salary Change process you must:

1. Activate Workflow.
2. Set up group build if Group ID is going to be used as the access type for managers requesting salary changes for their direct reports.
3. Set up the access type for HR_MGR_SALCHANGE on the Direct Reports Setup page.
4. Define the rules for salary change on the Configuration Options, Notification Setup, and Component Interface Setup pages.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions"

Changing Employee Salaries When No Allocated Budget Exists

This section discusses how to:

- Select employees for salary changes.
- Request salary changes for employees.
- Select transactions to approve.
- Approve ad hoc salary changes.
- View salary change transaction details and approval statuses.
- Process salary change requests submitted by managers.

Pages Used to Change Employee Salaries When No Allocated Budget Exists

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Employees	OPRROWS_MULTI	Manager Self Service, Compensation and Stock, Request Ad Hoc Salary Change, Select Employees	Select employees for whom you want to make salary changes.
Ad Hoc Salary Change	HR_SALCHANGE_MGR	On the Select Employees page, select the check boxes next to the employees whose salary you wish to change. Click the Continue button.	Enter new salary information for employees.
Select Transaction to Approve	SS_LIST	Manager Self Service, Compensation and Stock, Approve Ad Hoc Salary Change, Select Transaction to Approve	Select the employee for whom you want to approve a salary change.
Approve Ad Hoc Salary Change	HR_SALCHANGE_MGR	From the Select Transaction to Approve page, click the link associated with the employee whose salary change you want to approve.	Managers can view and then approve or deny each employee's salary change request and enter any relevant comments.
View Ad Hoc Salary Change Status	HR_SALCHANGE_STL	Manager Self Service, Compensation and Stock, View Ad Hoc Salary Chg Status, View Ad Hoc Salary Change Status	View the status of a salary change request.
Administer Request	HR_SALCHANGE_ADM	Workforce Administration, Self Service Transactions, Ad Hoc Salary Change Requests, Administer Request	Review and update salary change request statuses.

Selecting Employees For Salary Changes

Access the Select Employees page (Manager Self Service, Compensation and Stock, Request Ad Hoc Salary Change, Select Employees).

Ad Hoc Salary Change

Select Employees

Begin your Salary Change Request by entering the date on which the salary change will take effect and selecting Go. Then, select one or more employees for whom you will be requesting a change and select Continue.

Transaction Effective Date:

Direct Reports For Tina Palisco					
Select	Name	EmplID	Job Title	Department	
<input type="checkbox"/>	Angela McKay	KU0069	GenAuditor	Finance	
<input type="checkbox"/>	Annie Mirzoyan	KU0077	Bus Anlyst	Finance	
<input type="checkbox"/>	Antonio Santos	KU0010	Admin Asst	HR	
<input type="checkbox"/>	Joanna Misantoni	KUZ003	SrFinAnlst	Finance	
<input type="checkbox"/>	Justin Galang	KU0060	Sr Consult	HR	
<input type="checkbox"/>	Rochelle Li	KU0094	DE Clerk	HR	
<input type="checkbox"/>	Wilma Lopez	KU0087	Jr Consult	Cust Svc	

[Return To Manager Self Service](#)
[Return to Compensation and Stock](#)

Select Employees page

Select the check boxes associated with the employees whose salary you want to change; click Continue. You can also search for specific employee by clicking the Search for an employee button.

Requesting Salary Changes for Employees

Access the Ad Hoc Salary Change page (on the Select Employees page select the check boxes next to the employees whose salary you wish to change. Click the Continue button).

Ad Hoc Salary Change

The employees you selected are displayed below. Enter the desired salary change information and select Calculate New Total for each person. Select Submit once all salary changes have been entered.

Salary Change Date: 03/30/2009

Annie Mirzoyan

Employee ID: KU0077

Job Information

Job Title:	Analyst-Business	Market Reference Point:	
Full/Part Time:	Full-Time	Comparison Ratio:	1.06
Standard Hours:	40.00		
Salary Plan:	USA Salary Administration Plan		
Salary Grade:	Standard Pay Grade 4		
Salary Step:			

Salary Range

Minimum:	\$33372.00	Midpoint:	\$41715.00	Maximum:	\$50058.00
-----------------	------------	------------------	------------	-----------------	------------

Ad Hoc Salary Change page (1 of 2)

Data

Enter Salary Change Amounts
View Additional Salary Info

Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	
Default NA Hourly	21.25	<input type="text" value="0.000"/>	<input type="text" value="0.00"/>	<input type="text" value="21.25"/>	USD

Compensation Frequency: Semimonthly

Previous Salary: \$1,841.67 USD **New Total:**

Previous Annual Rate: \$44,200.00 USD **New Annual Rate:**

Comment:

[Return To Manager Self Service](#)
[Return to Select Employees](#)
[Return to Compensation and Stock](#)

Ad Hoc Salary Change page (2 of 2)

Enter Salary Change Amounts tab

- Change Percent** If you want to change the salary amount by a specific percentage amount, enter that amount.
- Change Amount** If you want to change the salary amount by a flat amount, enter that amount.
- New Amount** If you want to just enter the new salary amount, enter that amount.
- Calculate New Total** Click this button to have the system calculate the new total and new annual rate amounts.

View Additional Information tab

View additional salary information for the selected employee, such as Component, Current Amount, Type, and Frequency.

Selecting Transactions to Approve

Access the Select Transaction to Approve page (Manager Self Service, Compensation and Stock, Approve Ad Hoc Salary Change, Select Transaction to Approve).

Select Transaction to Approve

The hyperlinks below indicate groups of employees which require your participation in an approval process. Select a hyperlink to see details about what needs to be approved for each employee contained in the group

[Ad Hoc Salary Change 3](#)

Submitted By: Antonio Santos **Submitted Date:** 03/30/2009

Data				
EmplID	Name	Job Title	Last Process Action	Last Processed By
KU0094	Rochelle Li	DE Clerk	Submit	Antonio Santos

Go To: [Return To Manager Self Service](#)
[Return to Compensation and Stock](#)

Select Transaction to Approve page

Click the link above the employee's name. The system displays the Approve Ad Hoc Salary Change page.

Approving Ad Hoc Salary Changes

Access the Approve Ad Hoc Salary Change page (from the Select Transaction to Approve page, click the link associated with the employee whose salary change you want to approve).

Approve Ad Hoc Salary Change

This transaction requires an action on your part. For each employee, select the Approve or Deny action and enter comments (optional) in the area provided. Select Submit when you are finished.

Salary Change Date: 03/30/2009

Rochelle Li

Employee ID: KU0094

▶ Job Information

Data

Enter Salary Change Amounts

View Additional Salary Info

☰▶

Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	
Default NA Hourly	12.50	4.000	0.50	13.00	USD

Compensation Frequency: Weekly

Previous Salary:	\$500.00 USD	New Total:	\$520.00 USD
Previous Annual Rate:	\$26,000.00 USD	New Annual Rate:	\$27,040.00 USD

Approve / Deny

Approve
▼

Comment:

Approve Ad Hoc Salary Change page (1 of 2)

Process Detail			
Name	Role Name	Process Action	Process Action Date
Antonio Santos	Originator	Submit	03/30/2009
Tina Palisco	Manager		
Betty Locherty	Compensation Administrator		
Betty Locherty	Compensation Administrator		
John Sear	Compensation Administrator		
Jennifer Correa	Compensation Administrator		
Michael Dsouza	Compensation Administrator		
Soni Mahival	Compensation Administrator		
Alma Thompson	Compensation Administrator		
Andrew Harper	Compensation Administrator		
Peter Sear	Compensation Administrator		
Teo Dsouza	Compensation Administrator		
Rochelle Boyd	Compensation Administrator		
katrina Kennedy	Compensation Administrator		
Peter Murphy	Compensation Administrator		

[Comments](#)

Approve Ad Hoc Salary Change page (2 of 2)

Select either *Approve* or *Deny* and then click Save. In addition, you can add a comment in the Comment field before you click Save.

Viewing Salary Change Transaction Details and Approval Statuses

Access the View Ad Hoc Salary Change Status page (Manager Self Service, Compensation and Stock, View Ad Hoc Salary Chg Status, View Ad Hoc Salary Change Status).

Administer Request

Per request, approve and update, approve only, or deny the proposed data. You may also enter optional comments about your processing choice per request. When you are finished, select Save button at the bottom of the page.

Salary Change Date: 03/30/2009

Rochelle Li		
Employee ID:	KU0094	
Job Information		
Job Title:	Clerk-Data Entry	Market Reference Point: \$18,000 USD
Full/Part Time:	Part-Time	Comparison Ratio: 0.88
Standard Hours:	40.00	
Salary Plan:	USA Salary Administration Plan	
Salary Grade:	Standard Pay Grade 3	
Salary Step:		
Salary Range		
Minimum:	\$24452.00	Midpoint: \$30565.00
		Maximum: \$36678.00

Administer Request page (1 of 3)

Data					
Enter Salary Change Amounts		View Additional Salary Info			
Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	
Default NA Hourly	12.50	4.000	0.50	13.00	USD

Compensation Frequency: Weekly

Previous Salary: \$500.00 USD New Total: \$520.00 USD
 Previous Annual Rate: \$26,000.00 USD New Annual Rate: \$27,040.00 USD

Comment:

Process Detail				
Name	Role Name	Process Action	Process Action Date	
Antonio Santos	Originator	Submit	03/30/2009	
Tina Palisco	Manager	Approve	03/30/2009	
Betty Locherty	Compensation Administrator			

Administer Request page (2 of 3)

Administrator Actions	
Status:	Administrator Action Required
Self Service Admin Choices	
<input type="radio"/>	Select this option to approve the transaction and automatically update the database.
<input type="radio"/>	Select this option to approve the transaction. You will be required to manually update the database.
<input type="radio"/>	Select this option to cancel the transaction.
Go To Job Data	
<input type="button" value="Save"/>	
Go To:	Manager Home Salary and Compensation Home
<input type="button" value="Return to Search"/>	

Administer Request page (3 of 3)

Select one of the radio buttons in the Self Service Admin Choices group box and then click Save. Depending upon your choice, the system:

- Approves the transaction and updates the database.

- Approves the transaction and enables you to update the database by running the Load Salary Updates and Awards process.
- Cancels the transaction.

Handling Errors or Warnings

To display information about salary change requests, access the Workflow Inquiry page (Workforce Administration, Self Service Transactions, Workflow Inquiry). Enter either an employee ID or select a transaction name. If you select a transaction name, select *Ad Hoc Salary Change*. This page also provides an audit trail of who made the update to the database.

The Workflow Inquiry page enables administrators to review all transactions that:

- Successfully updated the database.
- Require further processing.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions"

Chapter 10

Changing Budgeted Salaries for Employees

This chapter provides an overview of budgeted salary changes, lists prerequisites, and discusses how to:

- Enter budgeted salary change requests.
- Approve budgeted salary changes.
- View the statuses of salary changes.

Understanding Budgeted Salary Changes

eCompensation Manager Desktop enables managers to change the salaries of their direct reports online. The process for changing a budgeted salary is:

1. The HR department must allocate and approve a salary increase budget for the group.
2. The manager may review the employee's compensation history.
3. If a salary change is required, the manager can enter the request and submit the request for approval.
4. If approval is required, an approver can accept or reject the request.
5. The manager can review the status of the request.

Prerequisites

Before managers can enter salary change requests, you must:

1. Activate workflow.
2. Set up budgeted salary plans.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Budgeting and Planning Salary Increases"

Entering Budgeted Salary Change Requests

Managers use the Request Budgeted Salary Change transaction to request or perform a merit increase for their direct reports. The manager selects an employee or a group and enters an increase for selected salary components. For groups with allocated budgets, the manager can adjust the increases for individuals in the group and compare the results with the budget. When the changes are complete, the manager submits the requests for approval. The submitted requests are routed for approval.

This section lists the pages used to request budgeted salary changes.

Pages Used to Request Budgeted Salary Changes

Page Name	Definition Name	Navigation	Usage
Request Budgeted Salary Change	HR_SALCHGRP_LAUNCH	Manager Self Service, Compensation and Stock, Request Budgeted Salary Change, Request Budgeted Salary Change	Initiate a salary change request by selecting a group ID.
Request Salary Change for Group with Allocated Budget	HR_SALCHBGT_BUDGET	Select a Group ID link on the Request Budgeted Salary Change page.	Select a group to edit.
Change Employee's Salary	HR_SALCHBGT_SALPL	On the Request Salary Change for Group With Allocated Budget page, click the Edit button associated with the employee whose salary you want to change.	View component salary details and modify the proposed salary increase for an individual employee, then click Continue.
Change Salary Component	HR_SALCHBGT_SP_MC	On the Change Employee's Salary page, click the Edit button associated with the salary component that you want to change.	Modify the proposed salary change amount for an individual component in the employee's compensation package, then click Continue.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Submit Confirmation	HR_SALCHBGT_CONFRM	Click the Submit for Approval button on the Request Salary Change for Group with Allocated Budget page.	Verifies that the salary change request has been submitted.

Approving Budgeted Salary Changes

After the manager completes the salary change request, it is routed for approval. The levels of approval and approvers are set up in the approval setup tables and are displayed on the Approval page. Only the next approver on the list has access to the page. After final approval is granted, an email notification is sent to the manager and a worklist or email is sent to HR as notification that the salary changes are approved and can be loaded to the employees' job data.

This section lists the pages used to approve budgeted salary changes.

Pages Used to Approve Budgeted Salary Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Approve Budgeted Salary Change	HR_SALCHGRP_APPR_L	Manager Self Service, Compensation and Stock, Approve Budgeted Salary Change, Approve Budgeted Salary Change	Initiate a salary change approval by selecting a group ID.
Approve Salary Change for Group with Allocated Budget	HR_SALCHBGT_BGT_AP	Click the link associated with the group ID for which you want to approve or deny salary changes on the Approve Group Salary Change page.	Approve or deny the requested salary changes.

Viewing the Statuses of Salary Changes

Managers use this transaction to view the status of salary change requests submitted in the Change Employee's Salary Change Request transaction. This page is identical to the Approval transaction, except that the Approve and Deny buttons do not appear.

This section lists the pages used to view salary change statuses.

Pages Used to View Salary Change Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Budgeted Sal Chg Status	HR_SALCHGRP_VW_L	Manager Self Service, Compensation and Stock, View Budgeted Sal Chg Status, View Budgeted Sal Chg Status	Use this page to select a group for which you want to view the status of any salary changes that were made. View the status of a group salary change request by selecting the Group ID.
View Approval Status of Salary Change for Group with Allocated Budget	HR_SALCHBGT_BGT_VW	On the View Budgeted Sal Chg Status page, select the ID of the group whose salary change status you want to view.	View the status of salary change requests for the selected group.

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