Human Capital Management Cloud

Implementing Workforce Compensation

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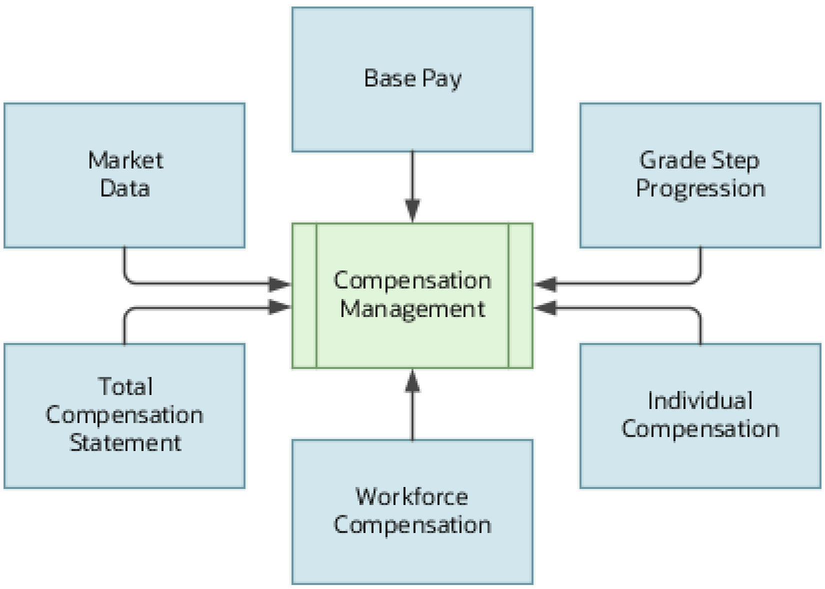
1 Overview of Compensation

Overview of Compensation Setup

You can plan and allocate salary and compensation for individuals and your workforce. You can also communicate compensation information to individuals. To get started implementing compensation, you need to have the **Application Implementation Consultant** role. With that role, you can opt into the Compensation Management offering in the Setup and Maintenance work area. You can also enable the relevant functional areas for your business.



Functional Area	Description
Base Pay	Collect and store salary information and pass it to payroll for processing. Also set up salary ranges and metrics to help managers and HR specialists follow organizational policies when proposing and approving salary changes. For example, a manager reviewing salary information for a promotion sees that the salary's just below the midpoint of the person's grade rate. The person is a high performer, so the manager decides to increase the salary change to be above the midpoint.
Grade Step Progression	Automate people's progression through grade ladders according to eligibility criteria and rules that reflect your progression policies. Also propose a new salary amount for the progression, or even automatically update the salary amount. For example, automatically promote someone to the next step of a progression grade ladder after 1 year when their performance rates 4 or higher.
Individual Compensation	Design compensation plans that let managers and HR specialists allocate off-cycle compensation to individuals, such as bonuses, tuition reimbursement, or allowances. Also design plans that let individuals contribute to charities or savings plans. And, identify the compensation awards that individuals can see in their compensation history.
Workforce Compensation	Create compensation plans and cycles used for compensating a group of workers. Configure the type of compensation allocated, the information displayed to managers, and whether to use budgeting. Also configure eligibility criteria for the plan or component, and the approval hierarchy.

Functional Area	Description
Total Compensation Statements	Design and deliver statements for individuals that can include traditional forms of pay, such as salary and individual compensation awards. You can also include nontraditional forms of pay, such as fringe benefits, cost of benefits, and paid time off.
Market Data	Analyze compensation survey data, survey jobs, survey job structures, and other survey attributes. Survey data can include key metrics, such as percentiles and deciles.

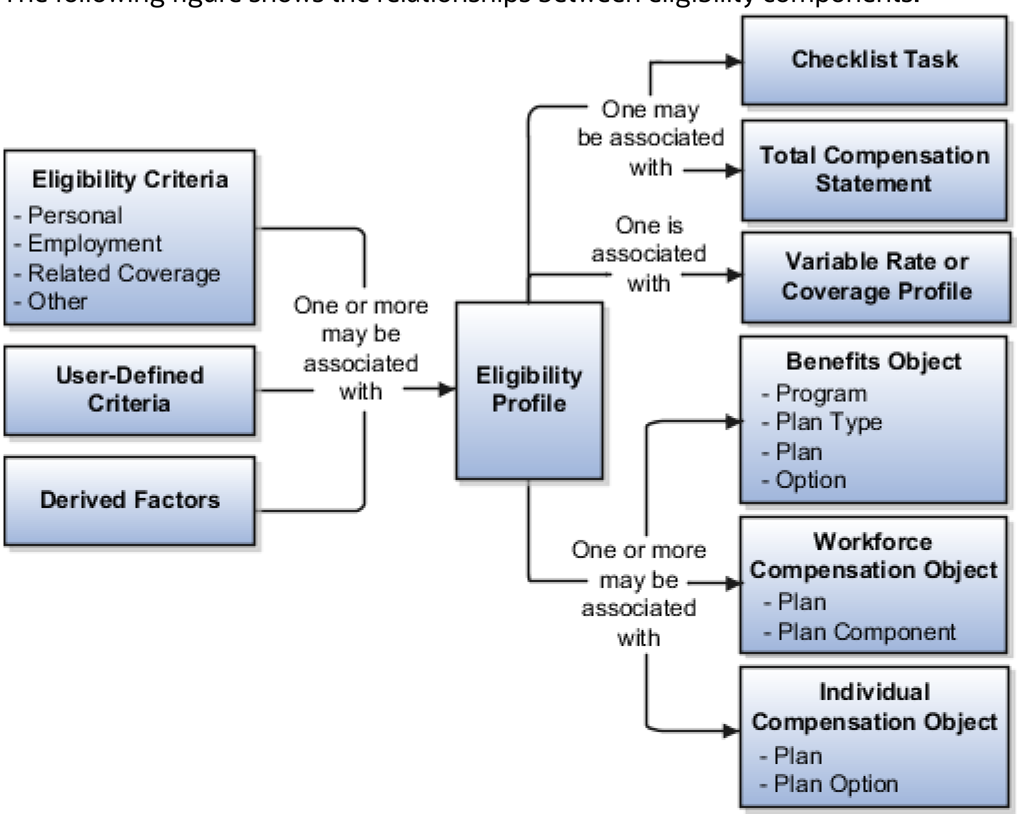
Related Topics

- Plan Your Implementation

How Eligibility Works With Other Objects

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

Object that Uses an Eligibility Profile	Purpose	Whether You Can Attach More Than One Profile?
Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage	No
Checklist task	Control whether that task appears in an allocated checklist	No
Total compensation statement	Apply additional eligibility criteria after statement generation population parameters	No
Benefits object	Establish the eligibility criteria for specific programs, plans, and options	Yes
Compensation object	Establish the eligibility for specific plans and options	Yes
Performance documents	Establish the eligibility for performance documents	Yes
Goal plans or goal mass assignments	Establish eligibility for the goal	Yes
Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan	Yes

Related Topics

- Eligibility Profiles
- User-Defined Criteria
- Derived Factors

Eligibility Profiles

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in a variety of business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
  - Derived factors
  - User-defined formulas
  - User-defined criteria
- Consider whether to combine criteria into one profile or create separate profiles depending on:
  - Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
  - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

  Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

Setting	Description
Profile Type	Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents. All other profiles are participant profiles.

Setting	Description
Usage	Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents. Selecting **Global** makes the profile available to multiple business process usages.
Assignment to Use	Determines the assignment that the eligibility process evaluates for the person • Select **Specific assignment** when the usage is Compensation or Performance. • Select a value that includes **benefit relationship** when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments. • Select one of the following values for all other usages, such as total compensation statements: ◦ Any assignment - enterprise ◦ Employee assignment only - enterprise ◦ Primary employee assignment only - enterprise

Defining Eligibility Criteria

Here's the list of eligibility criteria that you can use to configure benefit offerings:

Category	Description
Personal	• Gender • Person Type • Disabled • Uses Tobacco • Service Areas • Home Location • Postal Code Ranges • Leave of Absence • Termination Reason • Qualification • Competency • Marital Status • Religion
Employment	• Assignment Status • Hourly or Salaried • Assignment Category • Grade

Category	Description
	• Job • Position • Payroll • Salary Basis • Department • Legal Entities • Performance Rating • Quartile in Range • Work Location • Range of Scheduled Hours • People Manager • Job Function • Job Family • Hire Date • Probation Period • Business Unit
Derived factors	• Age • Length of Service • Compensation • Hours Worked • Full-Time Equivalent • Combined Age and Length of Service • Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Other	• Benefit Groups • Health Coverage Selected • Participation in Another Plan • Formula • User-Defined Criteria
Related coverage	• Covered by Another Plan • Covered by Another Plan in Program • Covered by Another Plan Type in Program • Covered by Another Program • Dependent Eligible for Another Plan Type in Program

Category	Description
	• Eligible for Another Plan • Eligible for Another Plan Type in Program • Enrolled in Another Option in Plan • Enrolled in Another Plan • Enrolled in Another Plan in Program • Enrolled in Another Plan Type in Program • Enrolled in Another Program • Other Coverage
Labor Relations	• Bargaining Unit • Labor Union Member • Union • Collective Agreement

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

Related Topics

- Create a Participant Eligibility Profile
- Examples of Eligibility Profiles
- Derived Factors
- User-Defined Criteria
- Single or Multiple Eligibility Profiles

Define Elements, Balances, and Formulas

The Define Elements, Balances, and Formulas task list contains the tasks required for creating payroll elements for compensation, absences, time and labor, and HR management. You can also use this task list if you're recording earnings, deductions, and other payroll data for reporting, compensation and benefits calculations, or transferring data to a third-party payroll provider.

Note: If you're using Oracle Global Payroll, use the Define Payroll task list instead. The Define Payroll task list includes additional tasks required to set up payroll processing.

Required Tasks

Your business requirements and product usage determine which required tasks you must perform. The required tasks include:

- Elements
- Payroll Definitions, which is usually required to support elements
- Consolidation Groups, which is required for creating payroll definitions

If you use predefined Payroll Interface extracts to transfer data to a third-party payroll provider, you may need to create element subclassifications, balances, organization payment methods, and object groups. Refer to the Global Payroll Interface documentation for more information.

Before You Begin

Before you start the Define Elements, Balances, and Formulas task list, complete the tasks these offerings contain.

Task	Use To	Why It's Important
Manage Legal Entities	Create payroll statutory units.	Ensures that hiring employees automatically creates payroll relationship records.
Manage Legal Entity HCM Information	Associate a legislative data group with each payroll statutory unit.	Ensures that hiring employees automatically creates payroll relationship records.
Manage Features by Country or Territory	Select Payroll Interface as the extension for any countries or territories where you extract HR data to send to a third-party payroll provider.	Ensures that you use the appropriate element templates to create earnings.

Task	Use To	Why It's Important

Configure Legislations for Human Resources

Use this task to create and edit legislative data for a country or territory that doesn't have a predefined country extension. It guides you through configuring some payroll objects and values required for creating elements, including:

- Tax year start date
- Period of service on rehire rules
- Default currency
- Element classifications
- Component groups
- Payment types

Note: Complete this task before the other tasks in this task list.

Elements

Use elements to communicate payment and distribution information to payroll applications from the source applications listed in the following table.

Source Application	Element Purpose
Compensation	• Earnings and deduction elements, such as bonuses, overtime earnings, and voluntary deductions. • Information elements to load user-defined data to use during a workforce compensation cycle.
Benefits	• Deduction elements to record activity rate calculation results, such as: ○ Employee contributions and employer distributions for medical options ○ Flex credits for flex benefits • Earnings elements if you want to disburse unused credits as cash.
Time and Labor	Time card details such as salary, overtime hours, and shift unit payments.
Absence Management	Absence details such as number of hours, days absent, or accrual absence balance details.

Payroll Definitions

The payroll definition supplies the payroll period frequency and dates, which some applications use for payroll calculations. A payroll is assigned to the assignment record of an employee, it indicates the payroll frequency for the assignment such as weekly. This table shows which applications require payroll definitions.

Application	Payroll Definition Required?	Usage Conditions
Global Payroll Interface	Yes, optional	Required if you run the Calculate Gross Earnings process
Compensation	Yes, optional	Required if you capture salary with a frequency of payroll period
Benefits	Optional	Required to use the payroll period frequency to calculate communicated rates or values passed to payroll.
Time and Labor	Optional	N/A
Absence Management	Optional	N/A

Consolidation Groups

You must have at least one consolidation group for each legislative data group where you create elements. Payroll definitions require a consolidation group.

Other Payroll-Related Setup Tasks

Your implementation might require other tasks from My Client Groups.

Task	Requirements
Organization Payment Methods	If you want to record personal payment methods for your employees, you must create organization payment methods and associate them with your payroll definitions. Organization payment methods define the combination of payment type and currency to use for payments to employees or external parties.
Element Classifications	Primary element classifications are predefined. If you run the Calculate Gross Earnings process (provided with Global Payroll Interface), you might create subclassifications to feed user-defined balances.
Fast Formulas	The Elements task provides predefined payroll formulas for payroll interface users. You can also write formulas for a number of uses, including: • Validating user entries into element input values • Configuring compensation, benefit, and accrual plan rules • Calculating periodic values for gross earnings and defining element skip rules for the Calculate Gross Earnings process (provided with Global Payroll Interface)
Balance Definitions	If you're using Global Payroll Interface, creating earnings elements creates balances automatically. You can edit these generated balance definitions. If you're using the Calculate Gross Earnings process, you may want to create additional balances for extracts or reporting.

Task	Requirements
Object Groups	You can create object groups to specify subsets of elements or payroll relationships to include in a report or process, such as the Calculate Gross Earnings process.

Related Topics

- Overview of Using Formulas
- Payroll Definitions
- Payroll Balance Definitions
- Implement Payroll Interface
- How Elements Hold Payroll Information for Multiple Features

Create Compensation Payroll Elements

You can define US legislative data group (LDG) elements for salary bases as well as individual and workforce compensation plans. You typically use elements when configuring these compensation types:

- Recurring base pay, such as annual salaries and hourly earnings.
- Recurring plan payments, such as an allowance.
- Nonrecurring plan payments, such as a bonus.
- Recurring and nonrecurring stock grants. Stocks awarded by individual and workforce compensation plans use element entries. Stocks loaded from third-party suppliers using the **Stock Grants** task don't use element entries.
- Recurring and nonrecurring storage of nonmonetary information, such as durations or points.
- Recurring voluntary deductions, such as savings plans or charitable contributions.
- Nonrecurring voluntary deductions, such as a onetime charitable contribution.

You need to create separate elements for salary bases, individual compensation plans, and workforce compensation plans.

Create the US LDG Element

Here's how you create the element. Use the **Elements** task in the Compensation work area and the default values except where otherwise indicated.

1. Click the **Create** icon.

2. On the Create Element dialog box, complete these steps:

    a. Select a US LDG.
    b. Select the primary classification that matches the use of the payroll element. You see different classifications listed depending on the LDG that you selected. Here are primary classifications you can use for compensation.

Element Use	Primary Classification
Recurring base pay Recurring plan payments	Standard Earnings For salary elements, compensation posts the annual salary amount to the element entry, regardless of the salary basis frequency. To have the element entry hold the salary amount in the frequency of the salary basis, use an information element without the **Periodicity** input value.
Nonrecurring plan payments	Supplemental Earnings
Recurring and nonrecurring voluntary deductions	Voluntary Deductions
Stock grants Storing nonmonetary information	Information

    c. Optionally, select a secondary classification. When the selections don't really match your purpose, you can skip this step. Here are secondary classifications you can use for compensation.

Element Use	Secondary Classification
Recurring base pay	Regular
Recurring plan payments	Regular Not Worked
Nonrecurring plan payments	Awards and Prizes, Bonus, another relevant option, or leave it blank.
Recurring and nonrecurring voluntary deductions	Select the relevant option. Otherwise, leave it blank.
Stock grants Storing nonmonetary information	Leave it blank.

d. Select the appropriate category, if required.
e. Click **Continue**.

Enter Element and Report Names, Specify If the Element Recurs

Here's how you set up the basic information page.

1. Enter a descriptive name that lets you and others easily figure out the use or purpose of the element. Make sure that the name starts with a letter and contains only letters, numbers, spaces, hyphens, or a combination of these. It can't contain any special characters.

   You can include prefixes that let people easily identify whether an element is for a salary basis or an individual compensation plan. You don't want people using the same element in different compensation objects because it can lead to payroll conflicts. It can also lead to unexpected deletions of salary or individual compensation.

Element Use	Sample Name
Recurring base pay	SB US Annual Salary or California Hourly Wages
Recurring plan payments	IC Gym Allowance or Car Allowance
Nonrecurring plan payments	IC Quarterly US Sales Award or New Hire Stock Grant
Recurring and nonrecurring voluntary deductions	IC Red Cross Contribution

2. Complete these basic information fields.

Field	Value Guidance
Reporting Name	Enter the name that you want to show on reports and payslips for this earnings or deduction payroll element. Reporting names need to be unique for elements that you add to compensation history.
Effective Date	**1/1/1951** Enter an early date so that the element is available for use immediately in your salary bases, and individual and workforce compensation plans.
What is the earliest entry date for this element?	Select **First Standard Earning Date**
What is the latest entry date for this element?	This date determines how element entries process after someone's terminated or transferred to another payroll. Select the value that fits your business process.

Field	Value Guidance
At which employment level should this element be attached?	For salary elements, match the employment level to the level where the legal employer holds people's salaries.

3. Specify whether this element recurs each payroll period or requires an explicit (nonrecurring) entry, such as a bonus, stock grant, or onetime charitable donation.

Element Use	Value
Recurring base pay Recurring plan payments, including stock grants Recurring voluntary deductions Recurring storage of nonmonetary information	Recurring (default)
Nonrecurring plan payments, including stock grants Nonrecurring voluntary deductions Nonrecurring storage of nonmonetary information	Nonrecurring

4. To accept the remaining default values, click **Next**. For Information elements, skip to the Double-Check Your Selections and Submit the Element section by clicking **Next** again.

Select the Calculation Rule, Default Periodicity, and Conversion Rule

You need to configure the calculation rules. Typically, you accept the default values for special and FSLA rules.

1. On the Create Element: Additional Details page, select the calculation rule.

Element Use	Value
Recurring base pay Recurring plan payments Nonrecurring plan payments Nonrecurring voluntary deductions	Flat amount

Element Use	Value
Recurring voluntary deductions	Flat amount or Percentage of Earnings

2. Select the default periodicity, which is the frequency that the salary basis or plan stores the amount in.

Element Use	Value Guidance
Recurring base pay	The value should be the same as the salary basis frequency, such as **Hourly**, **Weekly**, or **Monthly**.
Recurring plan payments	The typical value is **Monthly**.
Nonrecurring plan payments Nonrecurring voluntary deductions	**Quarterly**, **Annually**, or **Periodically**
Recurring voluntary deductions	Typically the same periodicity as base pay, such as **Annually** or **Monthly**

3. Select the conversion rule for the element. For the calculation used by each conversion rule, see the table in the next section.
4. To accept the default values for the remaining rules, click **Next**. If you use Global Payroll or Payroll Interface, configure additional details for base pay elements, such as proration and retroactive changes.

Select the Conversion Rule

Use this information to help you select the correct conversion rule when you're configuring the additional details in the previous section.

Conversion Rule	Calculation	Example
Standard Rate Annualized	1. Convert the source amount and periodicity to an annual value using default values of 2080 hours, 260 working days. 2. Convert the amount to the required periodicity and rate.	N/A
Standard Rate Daily	1. Calculate a daily rate using default value 260 working days. 2. Convert the amount to the required output periodicity and rate.	N/A
Standard Working Hours Rate Annualized	1. Convert the source amount and working hours to an annual value. Use the person's standard working hours. 2. Calculate the rate.	Scenario: The person works 40 hours a week with a monthly salary of 1000 US dollars.

Conversion Rule	Calculation	Example
		Calculation: ((1000*12) / (40.00*52) = 5.77 an hour
Assignment Working Hours Rate Annualized	1. Convert the source amount and working hours to an annual value. Use the person's working hours. 2. Calculate the rate.	Scenario: The person works 40 hours a week, with a 37.5 standard working hours a week, and a monthly salary of 1000 US dollars. Calculation: ((1000*12) / (37.50*52) = 6.15 an hour
Periodic Work Schedule Rate Annualized	1. Convert the monetary value and work schedule to an annual value. Use the person's work schedule for the payroll period for daily and hourly conversions. 2. Calculate the rate.	Scenario for a person assigned a monthly payroll: • The person has a monthly salary of 1000 US dollars. • The formula checks the work schedule details for the month. Daily conversion calculation: 1000 a month / 20 days in the month = 50 For a person not assigned a payroll: The calculation uses the weekly rate and converts the result to an annual amount. The calculation then divides the annual amount by the number of days or hours in that week, according to the work schedule.

Double-Check Your Selections and Submit the Element

On the Create Element: Review page, complete these steps.

1. Review all of your rules and options to ensure that every value is correct.
2. Click **Submit** to create the element.

Review Element Summary Input Values and Set Minimum and Maximum Amounts

For elements used by individual compensation plans, review the generated input values.

- Make sure that the expected input value has **Special Purpose** set to **Primary input value**. On individual compensation pages and in notifications the primary input value appears in the **Value** column. Detail pages show other input values. And notifications can show other input values if the **ORA_CMP_BIP_IC_SHOW_INPUT_VALUES** profile option is enabled.
- For each input value that doesn't apply to the plan, make sure that the **Displayed** and **Allow User Entry** check boxes aren't selected.
- For stock grant information elements, make sure that an input value with the **Number** unit of measure has **Special Purpose** set to **Primary Input Value**. The element date feeds the **Grant Date** column of the stock history table and the primary input value feeds the **Shares Granted** column. The Shares section of people's Compensation page uses these values. Depending on configurations, people's total compensation statements and workforce compensation change statements can also use them.

- For storage of nonmonetary information, make sure that the **Primary Input Value** doesn't have **Money** as the unit of measure.

To validate input values entered on individual compensation pages, add the relevant validation fast formula. For example, add a validation formula to enforce length of service requirements. A recipient's service must be more than 10 years to get a proposed award of 1,000 USD or more. The proposed allocation for anyone with shorter service must be less.

You can optionally complete the steps to set up minimum and maximum values when you use these elements with individual compensation plans:

- Standard earnings elements with a **Regular Not Worked** secondary classification
- Supplemental earnings elements

Optional minimum and maximum value setup:

1. In the Element Overview, Input Values section, select **Amount**.
2. In the Input Values section, on the **Edit** menu, select **Correct**.
3. In the Default Entry Values and Validation section, enter a minimum or maximum value, or both.
4. Select **Warning** or **Error**, as appropriate.

Value	Usage
Warning	Show a message when the manager or HR specialist enters an amount that's below the minimum value or above the maximum value, if set. This usage enables them to still continue with their submissions.
Error	Show a message when someone enters an amount that's below the minimum value or above the maximum value, if set. This usage prevents them from continuing until they enter an amount that's within the specified limits.

Make the Element Eligible for Everyone to Use

We recommend that you set up the element for open eligibility. This eligibility without any limiting criteria lets everyone use the element. Then, you can configure your compensation processes to determine salary and compensation plan eligibility.

1. In the Elements Overview section, select **Element Eligibility**.
2. On the **Actions** menu, select **Create Element Eligibility**.
3. In the General Information section, **Element Eligibility Name** field, enter the element name with the suffix **Open**.

   For example, for the payroll element **Spot Bonus**, the element eligibility name would be **Spot Bonus Open**.
4. Click **Submit**.
5. Click **Done**.

Related Topics

- How Element Classification Components Work Together
- Payroll Element Eligibility
- Options to Determine an Element's Latest Entry Date
- Periodicity Conversion
- How Payroll Elements Hold Information for Multiple Features

FAQ

What's the difference between a recurring and nonrecurring element?

A recurring element has an entry that applies in every pay period until the entry's ended.

A nonrecurring element has an entry that applies in one pay period only. It's only processed once per pay period. The payroll to which the person's assigned determines the dates of the pay period.

> **Note:** A base pay element associated with a salary basis must be recurring.

2 Profile Options for Salary and Compensation Approvals, Pages, and Actions

Profile Options for Salary Actions

These are the profile options that you can enable for salary actions.

HR_DISABLE_PENDING_APPROVALS_CHECK_IN _HCM_DATA_LOADER

To load salary changes with HCM Data Loader when related salary is pending approval, enable this option. The pending approvals can be from a standalone salary action, such as **Change Salary**. Or they can be part of HR actions, such as **Promote** or **Transfer**, that include salary changes.

ORA_PER_CLE_COPY_FUT_ASG

To copy future salary changes as part of the **Local and Global Transfer** flow, enable this option. For the copy to happen, the source and destination employers need to have the same legislative data group.

ORA_PER_EMP_RETAIN_CHANGES

To keep salary changes made during various actions when the proposer returns to the when section and changes the start date, enable this option. Actions include salary actions, such as **Change Salary** and **Salary History**. They also include HR actions, such as **Promote** or **Local and Global Transfer**.

ORA_PER_EMPL_DEFAULT_EFFECTIVE_DATE

Use this option to not default the when date in the responsive Change Salary flow. When you want to make sure that the proposer enters a date, set this option to **N**.

Related Topics

- Overview of Profile Options
- Create and Edit Profile Options

Profile Options for Compensation Pages and Actions

To use responsive compensation pages and stop pending approval checks for personal contributions, you can enable these profile options. Also check security for individual compensation data when assignments change.

CMP_COMPENSATION_RESPONSIVE_ENABLED

To let all individuals and managers use the responsive compensation pages that adjust to the screen size of their devices, enable this option. For this profile option to work after you enable it, you also need to create and enable the **HCM_RESPONSIVE_PAGES_ENABLED** profile option.

CMP_DISABLE_PENDING_APPROVALS_CHECK_IN_MANAGE_CONTRIBUTION

To let individuals submit additional personal contributions while other contributions are pending approval, enable this option. Also configure individual compensation plan access details so that people can't use the **Manage Personal Contributions** actions to update or discontinue contributions.

CMP_IC_DATACHECK_IN_NONCMP_FLOWS

To make sure that only people with relevant data security privileges maintain individual compensation in HR actions that have the section, enable this option. People without the necessary privileges who try to add individual compensation get an error about insufficient privileges.

Related Topics

- Overview of Profile Options
- Create and Edit Profile Options

Profile Options for Compensation Approval Notifications

These profile options affect content that appears in compensation approval notifications generated from Oracle Business Intelligence Publisher (BI) templates. When you enable or disable a profile option, you affect all notifications generated after that time. To use these profile options, you need to create and then enable all of them except **ORA_CMP_BIP_IC_SHOW_INPUT_VALUES**. You only need to enable that profile option.

BIP_ONLINE_NOTIFICATION_HCM_COMPENSATION Option

To generate BI approval notifications for all compensation actions, such as **Change Salary** and **Individual Compensation**, enable this option. For this profile option to work after you enable it, you also need to create and enable the **BIP_ONLINE_NOTIFICATION_HCM** profile option.

BIP_ONLINE_DISCLOSE_HISTORY_HCM_COMPENSATION Options

To have the Approvers section of the approval notification has a **Show Details** link instead of listing submission and approval details, enable this option. You reduce the initial content of the notifications while still letting people see the details when they need them.

- **BIP_ONLINE_DISCLOSE_HISTORY_HCM_COMPENSATION_CHANGESALARYAPPROVALTASK** applies to notifications for the **Change Salary** and **Manage Salary** tasks.

- **BIP_ONLINE_DISCLOSE_HISTORY_HCM_COMPENSATION_VARIABLEALLOCATIONTASK** applies to notifications for the **Manage Personal Contributions**, **Individual Compensation**, and **Administer Individual Compensation** tasks.

For the preceding profiles to work after you enable them, you also need to create and enable these profile options:

- BIP_ONLINE_DISCLOSE_HISTORY_HCM
- BIP_ONLINE_DISCLOSE_HISTORY_HCM_COMPENSATION

BIP_ONLINE_HIDE_EDIT_HCM_COMPENSATION Options

To hide the **Edit** button on approval notifications, enable this option.

- **BIP_ONLINE_HIDE_EDIT_HCM_COMPENSATION_CHANGESALARYAPPROVALTASK** applies to notifications for the **Change Salary** and **Manage Salary** tasks.
- **BIP_ONLINE_HIDE_EDIT_HCM_COMPENSATION_VARIABLEALLOCATIONTASK** applies to notifications for the **Manage Personal Contributions**, **Individual Compensation**, and **Administer Individual Compensation** tasks.

For the preceding profiles to work after you enable them, you also need to create and enable these profile options:

- BIP_ONLINE_HIDE_EDIT_HCM
- BIP_ONLINE_HIDE_EDIT_HCM_COMPENSATION

ORA_CMP_BIP_IC_SHOW_INPUT_VALUES Option

To include input values in the approval notifications for the **Manage Personal Contribution**, **Individual Compensation**, and **Administer Individual Compensation** actions, enable this option. This way, approvers can view all of the proposed input values and not just the primary input value. The notification includes the values stored in the input values columns. It doesn't include the meaning or descriptions when the values use validations, such as **Lookup Type**, **Value Set**, and **Validation Source**.

Related Topics

- Overview of Profile Options
- Create and Edit Profile Options

3 Responsive User Experience Setup

Deep Links

You can use deep links to provide easy navigation directly to a page in the HCM Cloud application. Deep links can also be used for mobile responsive pages on your intranet, custom and third-party applications, or in a document. This helps people run transactions in the HCM cloud and provides quick access to their HR information.

To access deep links:

1. Open the main menu.
2. Go to **Tools** > **Deep Links** .
3. Copy the URL for a deep link.
4. Paste the URL in the desired location.

When you open Deep Links, you will find a list of all available deep links.

Search Logic Profile Options for Client List of Values

You can use the logic <codeph>CONTAINS</codeph> to create the client list of values. This returns results containing the characters you enter. Optionally, for individual list of values, you could change this logic to <codeph>STARTS WITH</codeph>, to return results that start with the search characters you enter.

For example, when you search for a person with the name John Smith while using the logic `CONTAINS`, you can search by '**jo'** or **'sm'** or **'th'**. When you use the logic `STARTS WITH`, your search must start with '**j'**.

Use the logic `STARTS WITH` when your list contains thousands of values (more than 15,000 records) to improve the search performance. Or, if you don't partition your data by set ID.

> **Note:** If you change the search logic for a client list of values, the logic changes in all pages where the list of values is used.

Related Topics

- Search Logic Profile Options for Client List of Values
- Search Logic Profile Options for Client List of Values in Global Human Resources

Use Transaction Design Studio to Configure Field Displays

Use the Transaction Design Studio (TDS) to configure transactions and pages for responsive applications. TDS is available within the HCM Experience Design Studio. You can control the visibility of attributes that are displayed either as **Delivered** or **Enabled**, and the availability of fields and sections of a transaction based on the user's role, person's business unit, or legal employer.

By default, the responsive pages display the frequently used attributes and hide the less frequently used attributes. Use Page Composer to personalize the responsive pages and display the attributes and tabs delivered within the feature.

Here's how you start HCM Experience Design Studio:

1. Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC_ACCESS_HCM_TRANSACTION_CONFIGURATOR_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.
2. Enable a sandbox to compose data for configuring business objects. On the Home page, click the **HCM Experience Design Studio** quick action under the **My Client Groups** tab.
3. Under **Settings and Actions**, click **Edit Pages** .
4. Select the site layer and click **OK**.

Related Topics

- Overview of Page Modification

Displayed and Hidden Responsive Compensation Management Fields

You can configure compensation management fields using Transaction Design Studio.

My Compensation

You can configure these attributes, which make up the My Compensation page.

Attribute	Displayed	Comments
Current Salary	Yes	Section
Additional Compensation	Yes	Section
Personal Contribution	Yes	Section
Prior Salary	Yes	Section
Total Compensation Statements	Yes	Section
Workforce Compensation	Yes	Section
Shares	Yes	Section
Recurring and One-Time Payments	Yes	Section

Attribute	Displayed	Comments
Salary	Yes	Salary section attribute
Adjustment	Yes	Salary section attribute
Action	No	Salary section attribute
Action Reason	No	Salary section attribute
Start Date	Yes	Salary section attribute
Effective Period	No	Salary section attribute
End Date	No	Salary section attribute
Annual Salary	Yes	Salary section attribute
Annualized Full-Time Salary	No	Salary section attribute
Grade ladder	Yes	Salary section attribute
Grade Name	No	Salary section attribute
Grade Step	No	Salary section attribute
Salary Range	No	Salary section attribute
Salary Range Midpoint	No	Salary section attribute
Range Position	Yes	Salary section attribute
Compa-Ratio	No	Salary section attribute
Quartile	No	Salary section attribute
Quintile	No	Salary section attribute
Next Salary Review Date	No	Salary section attribute
Adjustment Amount	Yes	Salary section attribute, displayed with the salary basis type of components type

Attribute	Displayed	Comments
Adjustment Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annual Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annualized Full-Time Amount	No	Salary section attribute, displayed with the salary basis type of components type
Salary Amount	Yes	Salary drill-down attribute
Estimated Stock Price	No	Stock
Estimated Value of Vested Shares	No	Stock
Estimated Value of Unvested Shares	No	Stock
Business Title	No	

Compensation Info

You can configure these attributes on the Compensation page.

Attribute	Displayed	Comments
Current Salary	Yes	Section
Show Future and Prior Salary.	Yes	Section
Additional Compensation	Yes	Section
Shares	Yes	Section
Recurring and One-Time Payments	Yes	Section
Salary	Yes	Salary section attribute

Attribute	Displayed	Comments
Adjustment	Yes	Salary section attribute
Start Date	Yes	Salary section attribute
Effective Period	No	Salary section attribute
Action	Yes	Salary section attribute
Action Reason	Yes	Salary section attribute
Salary Basis	Yes	Salary section attribute
End Date	No	Salary section attribute
Annual Salary	Yes	Salary section attribute
Annualized Full-Time Salary	No	Salary section attribute
Grade ladder	Yes	Salary section attribute
Grade Name	No	Salary section attribute
Grade Step	No	Salary section attribute
Salary Range	No	Salary section attribute
Salary Range Midpoint	No	Salary section attribute
Range Position	Yes	Salary section attribute
Compa-Ratio	No	Salary section attribute
Quartile	No	Salary section attribute
Quintile	No	Salary section attribute
Next Salary Review Date	No	Salary section attribute
Adjustment Amount	Yes	Salary section attribute, displayed with the salary basis type of components type

Attribute	Displayed	Comments
Adjustment Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annual Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annualized Full-Time Amount	No	Salary section attribute, displayed with the salary basis type of components type
Currency	Yes	
Estimated Stock Price	No	Stock
Estimated Value of Vested Shares	No	Stock
Estimated Value of Unvested Shares	No	Stock
Currency	No	
Business Title	No	

Salary Attributes

You can configure these salary attributes, which make up the salary sections on various compensation pages. They're also part of various Offer and HR flows, such as Offer, Hire, Promote, and Transfer.

Attribute	Displayed	Comments
Start Date	Yes	
Action	Yes	
Action Reason	Yes	
End Date	No	
Salary Basis	Yes	

Attribute	Displayed	Comments
Salary Amount	Yes	
Adjustment Amount	Yes	For salary components, the value appears in the table. This attribute doesn't appear in the new Offers and New Hire flows delivered in 18C.
Adjustment Percentage	Yes	For salary components, the value appears in the table. This attribute doesn't appear in the new Offers and New Hire flows delivered in 18C.
Annual Salary	Yes	
Annualized Full-Time Salary	No	
Next Salary Review Date	No	
Grade Name	Yes	
Salary Range	No	Analytic displays salary range when available.
Salary Range Mid Point	No	
Compa-Ratio	Yes	
Range Position	No	
Quartile	No	
Quintile	No	
Currency	No	

Shares Section

You can configure these stock shares attributes on the My Compensation and Compensation Info pages.

Attribute	Displayed	Comments
Total Shares	Yes	

Attribute	Displayed	Comments
Vested Shares	Yes	
Unvested shares	Yes	
Granted	Yes	
Original Grant Price	Yes	
Estimated Stock Price	No	Hidden by default
Estimated Value of Vested Shares	No	Hidden by default
Estimated Value of Unvested Shares	No	Hidden by default
Unvested Value	Yes	

Salary History

You can configure the attributes in the two regions on the Salary History pages.

Salary History section

Attribute	Displayed	Comments
Start Date	Yes	
Action	Yes	
Action Reason	Yes	
End Date	No	
Salary Basis	Yes	
Salary Amount	Yes	
Adjustment Amount	Yes	
Adjustment Percentage	Yes	
Annual Salary	Yes	

Attribute	Displayed	Comments
Next Salary Review Date	Yes	
Placement in Salary Range	Yes	
Quartile	Yes	
Quintile	No	
Compa-Ratio	Yes	
Range Position	No	
Salary Range	No	
Salary Range Midpoint	No	
Created By	No	
Created On	No	
Updated By	No	
Updated On	No	
Grade Ladder	Yes	Appears when on grade ladder
Grade name	Yes	
Grade Step	Yes	Appears when on grade ladder, step
Comments and Attachments	Yes	Controls the display of the Comments and Attachment section
Currency to Use	No	

Salary Details section

Attribute	Displayed	Comments
Start Date	Yes	

Attribute	Displayed	Comments
Action	Yes	
Action Reason	Yes	
End Date	No	
Salary Basis	Yes	
Salary Amount	Yes	
Adjustment Amount	Yes	
Adjustment Percentage	Yes	
Annual Salary	Yes	
Annualized Full-Time Salary	Yes	
Next Salary Review Date	Yes	
Compa-Ratio	Yes	
Quartile	Yes	
Quintile	Yes	
Range Position	Yes	
Reason	Yes	
Salary Range	Yes	
Salary Range Midpoint	Yes	
Compensation Zone	Yes	Appears while using compensation zone based differential profile
Compensation Zone Type	Yes	Appears while using compensation zone based differential profile
Working at Home	Yes	Appears while using compensation zone based differential profile

Attribute	Displayed	Comments
Grade Ladder	Yes	Appears when on grade ladder
Grade name	Yes	
Grade Step	Yes	Appears when on grade ladder, step
Currency to Use	No	
Prior Salary	Yes	

Related Topics

- Use Transaction Design Studio to Configure Field Displays

Displayed and Hidden Responsive Team Compensation Fields

You can configure team compensation fields using Transaction Design Studio.

Assignment

You can configure these assignment attributes, which make up the Overview, Compensation, and Talent tabs of the My Team pages.

Attribute	Displayed	Comments
Image	Yes	
Person Display Name	Yes	
Business Title	Yes	Formerly known as Assignment Name. For incumbents, this field isn't displayed by default.
Number of direct reports and total number of reports	Yes	
Text for non-primary assignments	Yes	
Text for suspended assignments	Yes	

Attribute	Displayed	Comments
Icon and text for dotted line/matrix relationships	Yes	Includes text for relationship type. Line manager relationships don't display this field.
Text for worker type	Yes	Not displayed for individuals.
Person List Name	No	
Preferred Name (or Known As) and Last Name	No	
Person Number	No	
Assignment Number	No	
Job Name	No	
Job Code	No	
Job Name and Job Code	No	
Position Name	No	
Position Code	No	
Position Name and Position Code	No	
Location Name	No	
Location Code	No	
Location Name and Location Code	No	
Country Name	No	
Country Code	No	
Location Name and Country Code	No	
Local Time and Location Name	No	
Work E-mail Address	No	
Work Phone Number	No	

Attribute	Displayed	Comments
Assignment Type	No	
Legal Employer	No	
Legislation	No	
Legislation Code	No	
Cost Center	No	
Department Name	No	
Grade Name	No	
Grade Code	No	
Service Years	No	
Business Unit	No	
Current Salary, Currency and Basis	No	
Salary Range, Currency and Basis	No	
Compa-Ratio	No	
Development Goals	No	
Performance Goals	No	
Performance	No	
Potential	No	
Risk of Loss	No	
Impact of Loss	No	
Talent Score	No	

Team Compensation

You can configure this team compensation attribute.

Attribute	Displayed
Current to Use	Yes

Position

You can configure these position attributes, which make up the Overview, Compensation, and Talent tabs of the My Team pages.

Attribute	Displayed	Comments
Position Name	Yes	
Position Code	Yes	
Business Unit	Yes	This field isn't displayed by default on mobile devices.
Number of direct reports and total number of reports	Yes	
Headcount and FTE of incumbents	Yes	
Headcount and FTE of open positions	Yes	
Department Name	No	
Location Name	No	
Job Name	No	
Entry Grade	No	
Valid Grades	No	
Grade Ladder	No	
Position Headcount and FTE	No	
Hiring Status	No	

Attribute	Displayed	Comments
Type	No	

Requisition

You can configure these requisition attributes on the Overview tab of the My Team pages.

Attribute	Displayed
Requisition Title	Yes
Requisition Number	Yes
Requisition Status	Yes
Recruiter	Yes
Number of Candidates	No
Days Since Opened	No
Location	No
Department	No
Work Location	No
Job Name	No
Job Family	No
Job Function	No
Job Grade	No
Requisition Template	No
Internal Title	No
Number to Hire	No

Attribute	Displayed
Unlimited Hire	No

Vacancy

You can configure these vacancy attributes on the Overview tab of the My Team pages.

Attribute	Displayed
Vacancy Job	Yes
Department	Yes
Location	Yes
Openings	Yes
Requisition Number	No
Position Name	No
Remaining Openings	No

Related Topics

- Use Transaction Design Studio to Configure Field Displays

4 Approvals Overview

How Default Salary and Compensation Approval Tasks Work

You can route salary changes, individual compensation allocations, and workforce compensation allocations to the appropriate approvers using approval workflow tasks. You can configure the approval rules to support your compensation policies using these tasks in the Define Approval Management for Human Capital Management task list:

- Manage Task Configurations for Human Capital Management
- Manage Approval Groups

To find the task list, click Search on the Setup and Maintenance work area, Tasks panel tab.

Manage Task Configurations for Human Capital Management

Approval tasks are event-driven configurations containing rules that determine the approval routing and approvers for business objects, such as salary changes and compensation allocations.

- On the task Configuration tab of the workflows, the **Once per stage** task aggregation ensures that the approval process sends only one notification per approver.
- The Assignees tab provides a technical view of each task and is where you go to the task rules.

Here's what the default compensation approval tasks do:

Task Name	Description
ChangeSalaryApprovalTask	Runs when someone submits a salary change from the Salary section of compensation page, or using the **Change Salary** task or quick action. This approval task doesn't run for changes identified by the **Run Grade Step Progression** or **Synchronize Grade Step Rates processes**. Sends actionable notifications to the manager of the person who's salary is changing, to approve or reject the salary changes. • If the manager rejects the change, the task is complete. • If the manager approves the change, the task sends an actionable notification to their manager to approve or reject the change. Regardless of the second manager's action, the task stops at this level of the supervisor hierarchy.
SalaryHistsoryApprovalTask	Runs when someone submits a salary change from the **Salary History** action, quick action, or task. Sends actionable notifications to the approver, to approve or reject the salary changes.
VariableAllocationTask	Runs when someone submits an individual compensation or personal contribution allocation. Sends actionable notifications to the manager of the person getting the individual compensation allocation or making the personal contribution, to approve or reject the allocation. • If the manager rejects the allocation, the task is complete.

Task Name	Description
	• If the manager approves the allocation, the task sends an actionable notification to their manager to approve or reject the allocation. Regardless of the second manager's action, the task stops at this level of the supervisor hierarchy.

None of these approval workflow tasks include threshold rules by default. You can configure thresholds according to salary change percentage, salary change amount, current and new compa-ratio, grade, job, and so on. For example, you can create a rule using this IF statement that routes salary approvals when the salary change exceeds 10 percent:

```
Task.payload.getSalaryApprovalValuesResponse.result/value.newChangePercent more than 10.00.
```

Manage Approval Groups

By default, the delivered actionable approval workflow tasks route time cards using the dynamically determined supervisor hierarchy. You can identify specific approvers to route to instead using the Manage Approval Groups task.

ApprovalTimeRecordGroup attribute values vary by implementation. To figure out your value mapping, create your own data model report in the Reports and Analytics work area using this query:

```
select * from FUSION.cmp_col_attr_map where LOCATION like 'Approval' and ENTERPRISE_ID = <ent_id>;
```

> **Tip:** You can define rules on the primary input value using the **Worker's Other Compensation.Details.Amount** attribute.

Related Topics

- How You Define Approvals for Human Capital Management
- The Manager Hierarchy: How It's Maintained
- Guidelines for Managing Approval Rules
- Approver Types
- HCM Approval Rules

How You Configure Different Approval Flows for Individual Compensation Allocations and Personal Contributions

To configure different approval flows for individual compensation allocations and personal contributions, include the module identifier for the action in your rules.

Action	Module Identifier
Individual Compensation	`(Task.payload.transactionApprovalRequest.moduleIdentifier == "Change Variable Allocation")`

Action	Module Identifier
Manage Personal Contribution	`(Task.payload.transactionApprovalRequest.moduleIdentifier == "Make Personal Contribution")`
Administer Individual Compensation	`(Task.payload.transactionApprovalRequest.moduleIdentifier == "Administer Variable Allocation")`

Related Topics

- How Default Salary and Compensation Approval Tasks Work
- Route Approval for Individual Compensation or Personal Contribution Allocation by Action

5 Example Approval Configurations

Autoapprove a Salary Change If the Requester Is an HR Specialist

You control salary approvals with the **ChangeSalaryApprovalTask** workflow. Here's how you can configure the default workflow to automatically approve salary changes if the requester has the **HR Specialist** role.

Scenario

Edit approval workflows using the **Manage Task Configurations for Human Capital Management** task in the Setup and Maintenance work area. Complete this configuration of the THEN fields on the Assignees tab.

THEN Field	Value
List Builder	Supervisory
Response Type	Required This response type makes the notification actionable, instead of just informational.
Number of levels	1
Starting Participant	`HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRequest.Requ`
Top Participant	`HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRequest.Requ`
Auto Action Enabled	True
Auto Action	"APPROVE"
Rule Name	AutoapproveHRSpecialist

Related Topics

- How Default Salary and Compensation Approval Tasks Work

Grade Determines the Levels of Approval for a Salary Change

You control salary approvals with the **ChangeSalaryApprovalTask** workflow. Here's an idea of how you can configure the default workflow to set different levels of required approval. In this example, the required levels depend on the grade. If the requester's grade is **X**, then require only one level of approval. If the requester's grade is **Y**, then require two levels of approval.

Scenario

Edit approval workflows using the **Manage Task Configurations for Human Capital Management** task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

1. Create the rule where the requester's grade is **X**.

    a. Create this **IF** expression:

    ```
    Task.payload.Requestor's Assignment.result.grade.toUpperCase() is "X"
    ```

    b. Complete the **THEN** fields, as you see here.

Then Field	Value
List Builder	Supervisory
Response Type	Required This response type makes the notification actionable, instead of just informational.
Number of levels	1
Starting Participant	`HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRec`
Top Participant	`HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRec`
Auto Action Enabled	False
Auto Action	null
Rule Name	`1LevelforGradeX`

2. Create the rule where the requester's grade is **Y**.

   a. Create this **IF** expression:

   ```
   Task.payload.Requestor's Assignment.result.grade.toUpperCase() is "Y"
   ```

   b. Complete the THEN fields, as you see here.

Then Field	Value
List Builder	Supervisory
Response Type	Required This response type makes the notification actionable, instead of just informational.
Number of levels	2
Starting Participant	`HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalReq`
Top Participant	`HierarchyBuilder.getManagerOfHierarchyPrincipal("supervisory",HierarchyBuilde` `("supervisory",Task.payload.transactionApprovalRequest.Requestor,-1,null,nul`
Auto Action Enabled	False
Auto Action	null
Rule Name	`2LevelsforGradeY`

Related Topics

- How Default Salary and Compensation Approval Tasks Work

Route Approval for a Salary Change According to Country and Amount

You control salary approvals with the **ChangeSalaryApprovalTask** workflow. Here's an idea of how you can configure the default workflow to route the approval depending on the country and amount. In this example, the country is the **US**. If the amount is more than **10,000**, the approval routes to **X** and **Y** and then the area of responsibility. If the amount is less than **10,000**, it routes to only the area of responsibility.

Scenario

Edit approval workflows using the **Manage Task Configurations for Human Capital Management** task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

1. Create the rule where the country is **US** and the amount is more than **10,000**.
   a. Create this **IF** expression:

```
Task.payload.Requestor's Assignment.result.legislationCode.toUpperCase() is "US"
 andSalaryApproval.newChangeAmount.doubleValue() more than 10000
```

   b. Complete the THEN fields for users **X**, as you see here.

THEN Field	Value
List Builder	Resource
Response Type	Required This response type makes the notification actionable, instead of just informational.
Users	X
Groups	null
Application Role	null
Rule Name	`USover1000usersX`

   c. Complete the THEN fields for users **Y**, as you see here.

THEN Field	Value
List Builder	Resource
Response Type	Required This response type makes the notification actionable, instead of just informational.
Users	Y
Groups	null

THEN Field	Value
Application Role	null
Rule Name	`USover1000usersY`

d. Complete the THEN fields for users according to their area of responsibility, as you see here.

THEN Field	Value
List Builder	Resource
Response Type	Required This response type makes the notification actionable, instead of just informational.
Users	`GetRepresentative("HR_REP",Task.payload.Worker's Current Representative.result)`
Groups	null
Application Role	null
Rule Name	`USover1000usersAOR`

2. Create the rule where the country is **US** and the amount is less than **10,000**.

a. Create this **IF** expression:

```
Task.payload.Requestor's Assignment.result.legislationCode.toUpperCase() is "US"
 andSalaryApproval.newChangeAmount.doubleValue() less than 10000
```

b. Complete the THEN fields, as you see here.

THEN Field	Value
List Builder	Resource
Response Type	Required This response type makes the notification actionable, instead of just informational.

THEN Field	Value
Users	`GetRepresentative("HR_REP",Task.payload.Worker's Current Representative.result)`
Groups	null
Application Role	null
Rule Name	`USunder1000usersAOR`

Related Topics

- How Default Salary and Compensation Approval Tasks Work

Route Approval for Recurring Individual Allocation When the Amount Changes by a Percentage

You control individual compensation approvals with the **VariableAllocationTask** workflow. Here's how you can configure the default workflow to handle approvals for percentage changes to recurring awards made using responsive compensation pages. You use an approval configuration like this because the responsive pages split updates at submission. In this example, you configure these variable allocation rules to account for both recurring and nonrecurring elements associated with the awards and contributions.

Rule Name	Purpose
`RecurUnder10%`	Route recurring awards and contributions with changes that are less than 10%.
`OnetimeUnder10%`	Route onetime awards and contributions with changes that are less than 10%.
`Onetime10%plus`	Route onetime awards and contributions with changes that are 10% or more.
`Recur10%plus`	Route recurring awards and contributions with changes that are 10% or more.

CAUTION: To make sure that any simultaneous updates happen correctly, confirm that the elements associated with the individual compensation plans have **Multiple entries not allowed** selected.

Edit approval workflows using the **Manage Task Configurations** for Human Capital Management task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

Enable Advanced Mode

1. Expand the **VariableAllocatiRules** rule.
2. Click the **Show Advanced Settings** icon, which is between the **Expand** icon and the rule name.
3. Select **Advanced Mode**.

Create the `RecurUnder10%` Rule

1. Create this **IF** expression:

```
Task is a Task
and
Lists is a Lists
and
Each {
 ICD is a Worker's Other Compensation Details and
 FirstAmouont = ICD.Amount.doubleValue() and
 Frequency = ICD.Other Compensation Award Frequency and
 FirstPlanId = ICD.planId and
 FirstOptionId = ICD.Other Compensation Option Id and
 Mflag = ICD.multipleEntriesAllowedFlag.toUpperCase()
and
 ICD2 is a Worker's Other Compensation Details and
 SecondAmount = ICD2.Amount.doubleValue()
 ChangePercent = ((SecondAmount-FirstAmount/FirstAmount)*100
 SecondPlanId = ICD1.planId
 SecondOptionId = ICD2.Other Compensation Option Id
 (Frequency is "R" and
 Mflag is "Y" and
 SecondPlanId is FirstPlanId and
 SecondOptionId is FirstOptionId and
 ChangePercent less than 10.00 and
 ChangePercent more than 0)
}
```

2. Complete the **THEN** fields, as you see here.

THEN Field	Value
List Builder	Resource
Response Time	Required This response type makes the notification actionable, instead of just informational.
Users	X
Groups	null
Application Role	null
Rule Name	`"RecurUnder10%"`

THEN Field	Value
Dimension Id	null

Create the `OnetimeUnder10%` Rule

1. Create this **IF** expression:

```
Task is a Task
and
Lists is a Lists
and
Each {
 ICD is a Worker's Other Compensation Details and
 ICD.Other Compensation Change in Value Percentage less than 10.00
}
```

2. Complete the **THEN** fields, as you see here.

THEN Field	Value
List Builder	Resource
Response Time	Required
Users	X
Groups	null
Application Role	null
Rule Name	`"OnetimeUnder10%"`
Dimension Id	null

Create the `Onetime10%plus` Rule

1. Create this **IF** expression:

```
Tasks is a Task
and
Lists is a Lists
and
Each {
```

```
 ICD is a Worker's Other Compensation Details and
 ICD.Other Compensation Change in Value Percentage.doubleValue() same or more than 10.00
}
```

2. Complete the **THEN** fields, as you see here.

THEN Field	Value
List Builder	Resource
Response Time	Required This response type makes the notification actionable, instead of just informational.
Users	X
Groups	null
Application Role	null
Rule Name	`"Onetime10%plus"`
Dimension Id	null

Create the `Recur10%plus` Rule

1. Create this **IF** expression:

```
Task is a Task
and
Lists is a Lists
and
Each {
 ICD is a Worker's Other Compensation Details and
 FirstAmount = ICD.Amount.doubleValue() and
 Frequency = ICD.Other Compensation Award Frequency and
 FirstPlanId = ICD.planId and
 FirstOptionId = ICD.Other Compensation Option Id and
 Mflag = ICD.multipleEntriesAllowedFlag.toUpperCase()
and
 ICD2 is a Worker's Other Compensation Details and
 SecondAmount = ICD2.Amount.doubleValue()
 ChangePercent = ((SecondAmount-FirstAmount)/FirstAmount)*100
 SecondPlanId = ICD2.planId
 SecondOptionId = ICD2.Other Compensation Option Id
 (ChangePercent same or more than 10.00 and
 Frequency is "R" and
 Mflag is "Y" and
 SecondPlanId is FirstPlanId and
 SecondOptionId is FirstOptionId and
```

```
 ChangePercent more than 0)
}
```

2. Complete the **THEN** fields, as you see here.

THEN Field	Value
List Builder	Resource
Response Time	Required
Users	X
Groups	null
Application Role	null
Rule Name	`"Recur10%plus"`
Dimension Id	null

Related Topics

- How Default Salary and Compensation Approval Tasks Work

Autoapprove Personal Contributions

You control salary approvals with the **VariableAllocationTask** workflow. Here's how you can configure the default workflow to automatically approve personal contributions.

Scenario

Edit approval workflows using the **Manage Task Configurations for Human Capital Management** task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

1. Create this **IF** expression:

```
(Task.payload.transactionApprovalRequest.moduleIdentifier == "Make Personal Contribution")
```

2. Complete the THEN fields, as you see here.

THEN Field	Value
List Builder	Supervisory
Response Type	Required This response type makes the notification actionable, instead of just informational.
Number of levels	1
Starting Participant	`HierarchyBuilder.getPrincipal(Task.payload.transactionApprovalRequest.Requestor,-`
Top Participant	`HierarchyBuilder.getPrincipal(Task.payload.transactionApprovalRequest.Requestor,-`
Auto Action Enabled	True
Auto Action	"APPROVE"
Rule Name	`AutoapprovePersonalContribution`

Related Topics

- How Default Salary and Compensation Approval Tasks Work

Route Approval for Individual Compensation or Personal Contribution Allocation by Action

You can route individual compensation and personal contribution allocations to different approvers depending on the action used to make the allocation. Make these changes to individual compensation and personal contribution approval rules using the **Navigator** > **Tools** > **Transaction Console** task.

1. On the Transaction Manager: Transactions page, click the Approval Rules tab.
2. On the Transaction Manager: Rules page, search for and click any process you want to change:
    - Administer Individual Compensation
    - Manage Individual Compensation
    - Manage Personal Contributions
3. If the process is configured to bypass approvals, click the **Bypass Approvals** icon to turn off the bypass.

Add a Rule

1. Click the corresponding **Configure Rules** icon.
2. On the Approval Rules page, click the **Add New Rule** icon.
3. On the graphic, click the rule oval that just appeared, for example, **Rule1**.

Configure the Rule to Route by the Module Identifier

1. In the Rule: Add Details section, enter a rule name, such as **Administer Action**, **Manage Action**, or **Contribution Action**.
2. Click **Configure Rule Conditions**.
3. On the Condition Details dialog box, click the box with the existing expression **1 == 1**.
4. Click **Edit Selection**.
5. On the Approval Rules: Edit Condition Expression dialog box, change **Enter a number** to **Select from attribute**.
6. In the **Select Attribute** list, select **transactionApprovalRequest** > **moduleIdentifier** .
7. Change **Select Operator** to **==**.
8. Change **Select value type** to **Enter a string**.
9. In the field that appears, enter the appropriate module identifier:

Action	Module Identifier
Make Personal Contribution	Make Personal Contribution
Individual Compensation	Change Variable Allocation
Administer Individual Compensation	Administer Variable Allocation

10. Click **OK**.
11. On the Condition Details dialog box, review the expression. It should look something like this expression for the **Administer Individual Compensation** module identifier:

```
(transactionApprovalRequest.moduleIdentifier == "Administer Variable Allocation")
```

12. Click **OK**.

Add the Approver

1. On the Approval Rules page graphic, in the path of your new rule, click the **THEN** object to highlight it.
2. In the Approvers pane, click the **Add Approver Participant** icon next to the appropriate approver, such as **Representative**.
3. Click **Submit**.

Related Topics

- How You Configure Different Approval Flows for Individual Compensation Allocations and Personal Contributions

6 Market Data

Overview of Market Data

Overview of market data feature in compensation.

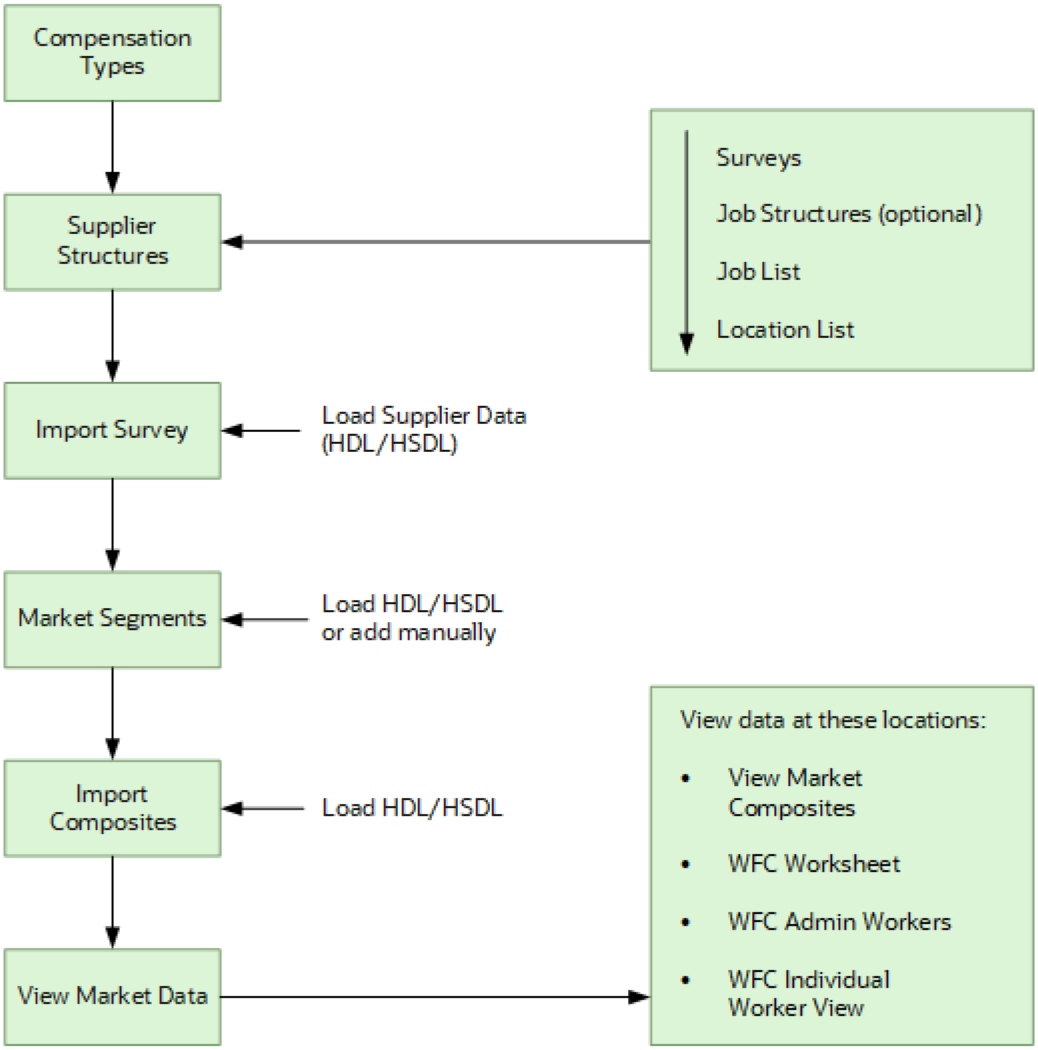
Various job evaluation methods exist as a way to price jobs according to their worth. Market data is a method to price jobs that are externally focused, so you attract and retain workers based on the labor market. The foundation for any job evaluation method, including market data, is to start with good job descriptions.

You might want to compare your salaries, salary ranges, and other compensation such as bonus or stock to prepared industry-wide data to make sure your compensation is in line with your company's goals. For example, you might want to make sure you award your people at the 50th percentile of the industry average by job and location. Or you might want to award base pay at a lower percentile but award stock at a higher level.

With market data you map external survey jobs and locations with internal jobs and locations. Then, you import the surveys and use the market data subject area in OTBI to consolidate the data. After you create composites of your survey data, you import these composites. Finally you can display the composites in the worksheet or administer workers in Workforce Compensation.

You can find the market data tasks in the Compensation work area under Market Data.

Here's a diagram that shows you the market data task flow:



How You Use Market Data Surveys to Create Composites

A list of the step you take to impoprt and use survey data and convert them to composites.

Surveys are market data from an individual supplier. Composites are aggregated survey data.

Here are the steps you take to import and use survey data and convert them to composites.

1. Decide which surveys to buy and participate in.
2. Receive surveys from suppliers.
3. Use OTBI to help you complete surveys.
4. Return surveys to the suppliers.
5. Receive survey results from each supplier.
6. Import the surveys using the Import Survey task.
7. Use OTBI to analyze your people's data versus the surveys' data.

8. Take any actions based on your analysis, such as, updating salary ranges or aligning salaries with the market.
9. Use OTBI to aggregate surveys into composites.
10. Import composites using the Import Composites task.
11. Display composites in Workforce Compensation.
12. Line managers and administrators make compensation allocation decisions based on the composites.

Note: If you already have composites, you can start from step 10. However, in that case, the survey data won't be in the subject area.

Related Topics

- Overview of Market Data
- Import Survey for Market Data
- Import Composites for Market Data

Compensation Types for Market Data

Describes the use of compensation types in market data.

Your first task is to define the compensation types that you want to display in market data. Compensation types let you identify different kinds of pay, such as base salary and bonus, and import survey data for each type. You can find the Compensation Types page in the Compensation work area under Market Data.

The Compensation Types page is where you identify the market target. For example, if you target the 50th percentile of the market for Base Salary then you can select that option. If you target the 40th percentile for base salary and the 60th percentile for bonus, then this is where you identify that mix of pay. The target appears in market composites wherever they occur in the application.

We deliver several common compensation types, but you can add your own. For example, you might want to offer supplemental life insurance to executives and review that across competitors in the survey data. Create a compensation type with the name Executive Benefit Supplemental Life Insurance. Select the Compensation Group of Benefits and a Data Type of Other.

If you need to set market targets separately for different countries, create and load survey data in that manner. For example, if the India salary market target is 60% and United States is 50%, create separate compensation types for them. Load the India salary with one compensation type and the US salary with another.

Related Topics

- Overview of Market Data

Overview of Supplier Structures

Describes the actions to confugue supplier structures.

The Supplier Structures page in the compensation work area iis where you match your internal jobs and locations to survey jobs and locations. You start by adding your suppliers and their surveys. You can have multiple suppliers and each supplier can have multiple surveys. On the Manage Job List page, you load or manually add survey jobs and match them to your internal jobs or positions. On the Manage Location List page, you can load or manually add survey locations and match them to internal locations. You can match several internal locations to a survey location.

Here's a list of the subtasks under the supplier structures task:

Page	Description
Manage Surveys	You add your suppliers and their surveys on this page. You can have multiple suppliers and each supplier can have multiple surveys. You add details for each supplier. For example, you can add a supplier like Hay. And then you can add surveys from Hay like Hay Professional Survey and Hay Executive Survey.
Manage Job Structures	You can associate job function, job family and other structures to survey jobs. These are entirely optional. If you do use these values you need to configure them before you add jobs. Then, you can select the attributes from job structures when you're in the Manage Job List page. Job structurers are Job Family, Job Function, Career Stream or Band, or Career Level. You can use the Manage Jobs Structures task to contain info about the survey jobs per se. This associates these Job Structures to survey jobs only. It's not tied to internal jobs.
Manage Job List	You can load or manually add survey jobs or positions and match them to your internal jobs or positions. At the top of the page there's info about the number of survey jobs and what you've matched. If you want to use any of the Job Structures (Job Function, Job Family, Career Stream or Band, Career Level or Other Level) associated to Survey Jobs, be sure to add them first or they won't be available to select. These are optional. You use the Job Match Notes section to record notes about why job matches change over time. For example, last year you might have recorded internal Accountant 1 as a match to survey Accountant. But this year changes in the internal job description for Accountant 1 no longer matches the survey description for Accountant. Because you might need to explain this to the survey auditor at a later time, it's a good idea to make a note about your decision when it occurred.
Manage Location List	On the Manage Location List page, you can load or manually add survey locations and match them to internal locations. You can match many internal locations to a survey location. You can map on a many to 1 basis here. This is helpful especially if the survey location is broader than your internal locations. For example, if the survey location is Northern California, then you can include all of your NoCal locations in the mapping. This helps your downstream analysis by associating the survey data with all the employees in those internal locations. Another example is if the survey data is by country, and you have a few locations in that country.

Related Topics

- Overview of Market Data

How You Match a Survey Job or Position to Your Internal Data

Describes how to match internal jobs or positions to internal data.

In the Match Internal Job or Position section, you match the survey job to your job or position. Use the radio button to select either. Search for the internal job or position code that matches the survey job. If you've identified parent benchmark jobs in Global HR, the child jobs appear below the match.

Related Topics

- Overview of Supplier Structures

Difference Between Global HR Benchmark Jobs and Survey Benchmark Jobs

The Parent Job or Global HR Benchmark indicator refers to a setting in Jobs in Global HR. Here's the difference between Global HR Benchmark jobs and Survey Benchmark jobs.

- Survey benchmark jobs are matched to internal jobs or positions in Supplier Structures. Any of your internal jobs that you match to survey jobs, are survey benchmark jobs.
- Parent Job or Global HR benchmark jobs are indicated that way in the job table, and have child jobs associated with them.

Related Topics

- Overview of Supplier Structures

Import Survey for Market Data

Describes the process to import survey info for marrket data.

Surveys are market data from an individual supplier. You can use the Create Import Template button on the Import Market Data page to invoke the HSDL.You can only load surveys and not manually add them. However, after you load them, you can modify editable columns like dates, and percentiles. You can use the HCM Data Loader to create survey records when you implement Market Data for the first time or provide regular updates.

Before You Start

Here's some things to consider before you begin.

- You need to have a supplier and a survey, with survey jobs and locations, before you import surveys. You can use existing compensation types.
- The **Batch Name**, **Supplier Code**, **Survey Code**, **Survey Location Code**, **Survey Job Code**, **Compensation Type Code**, and **Industry** fields are required.
- The industry column can't be blank. It can be All, ALL, #NULL, or anything else.

Generate the Workbook

Create the market data workbook in the Compensation work area.

1. On the Tasks panel tab under Market Data click **Import Survey**.
2. On the Import Survey page, click **Create Import Template** to create the workbook.

Enter Survey Data

Add enough rows to accommodate your supplier's data. Copy the market data and paste them into cells with a white background. The workbook adds a symbol in the **Changed** field to mark the rows that you added. Reordering or removing columns in the import file causes the upload process to fail.

Upload Survey Data

When you're done, click **Upload**. The application uploads only those rows that are marked as **Changed**. It ignores any changes in cells without a white background.

> **CAUTION:** Don't select the **Upload and then immediately download** option when prompted during an upload. The data that you uploaded immediately downloads back into the workbook, hiding any errors that occurred during the upload.

Validate Changes

On the Import Survey page, search for and select the start date and record type, or other search criteria.

Resolve Errors

The upload process automatically updates the **Status** cell in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application.
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

New uploads to existing data make date-effective changes to the data.

Use the Data Exchange work area under My Client Groups to see the upload. You see if the process completed successfully and learn about any error messages.

Related Topics

- Overview of Market Data

Market Segments

Market segments are groups of locations. After you review your survey and internal locations you can select segments or locations based on geographic labor market pay differences. You can find the Market Segments task in the Compensation work area under Market Data.

You can decide, for example, that some of your market data should use internal locations for market comparisons, while other portions of your organization need segmentation. You might want to consolidate internal locations into market segments if your composites in some locations are all the same. Let's say you have 3 offices in the San Francisco Bay Area, and the market data for those is the same.

Rather than loading the same data 3 times into 3 locations, you can create a market segment that includes your 3 locations and load the composites once. You might decide that the administrative jobs data differs enough locally in the Bay Area that you want to use internal locations for those jobs. However, the manager jobs don't have such local differentiations. Load the administrative jobs using internal locations, and load the managerial jobs using segments.

Related Topics

- Overview of Market Data

Import Composites for Market Data

Describes the process to import composites for market data.

Composites are aggregated survey data. They are summaries of all survey data. Composites are mapped to your internal jobs or positions, and internal locations or segments.

> **Note:** If you use only 1 survey, the survey tables hold the raw survey data from the supplier, while the composite table holds your vetted data that you prepared for line manager consumption.

You can use the **Create Import Template** button on the Import Market Composite page to invoke the HDSL You can also use the HCM Data Loader to upload the consolidated surveys from the suppliers.

Before You Start

Here's some things to consider before you begin.

- Make sure to load only segment or location within a row, and not both. If you use location, you need to make sure the segment column has a #NULL in it.
- Similarly, make sure to load only job or position within a row, and not both. If you use position, you need to make sure the job column has #NULL in it.
- The industry column can't be blank. It can be All, ALL, #NULL, or anything else.
- Use internal codes for jobs, positions or locations, and not the survey codes you use to load composites.

- Remember: composites are no longer raw survey data, but aggregations of all the surveys, so any individual survey codes no longer apply.

To use the imported data, you need to complete one or both of these tasks, either before or after the import:

- To view in workforce compensation you need to enter a market composite effective date for the plan cycle.
- To see the individual worker view you need to create a market composite tile in the individual worker view task.

Generate the Workbook

Create the market data workbook in the Compensation work area.

1. On the Tasks panel tab under Market Data click **Import Composites**.
2. On the Import Composites page, click **Create Import Template** to create the workbook.

Enter Composite Data

Add enough rows to accommodate your composite data. Copy the composites and paste them into cells with a white background. The workbook adds a symbol in the **Changed** field to mark the rows that you added. Reordering or removing columns in the import file causes the upload process to fail.

Upload Composites

When you're done, click **Upload**. The application uploads only those rows that are marked as **Changed**. It ignores any changes in cells without a white background.

> **CAUTION:** Don't select the **Upload and then immediately download** option when prompted during an upload. The data that you uploaded immediately downloads back into the workbook, hiding any errors that occurred during the upload.

Validate Changes

On the Import Composites page, search for and select the start date and record type, or other search criteria.

Resolve Errors

The upload process automatically updates the **Status** cell in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application.
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

New uploads to existing data make date-effective changes to the data.

Use the Data Exchange work area under My Client Groups to see the upload. You see if the process completed successfully and learn about any error messages.

Related Topics

- Overview of Market Data

Options to View Market Composites in Compensation

Describes the options to view market composites in compensation.

You can view market composites in workforce compensation and in market data.

Market Composite Views

To view in workforce compensation you need to do the following in the Workforce Compensation Plans setup task:

- Enter a market composite effective date on the Configure Plan Cycles page.
- Enable market composites column on the Configure Worksheet Page Layout page, Detail Table tab, Additional Information section.
- Enable Individual Worker View and create a market composite tile on the Individual Worker View page.

Line managers and administrators can view market composites in multiple ways.

Role	Location
Line Manager or Compensation Manager	Market Composites dialog box on the Workforce Compensation Worksheet Individual Worker View page on the Workforce Compensation Worksheet
Compensation Manager	Administer Workers page, Compensation tab in the Compensation work area
Compensation Analyst	View Market Composites page in the Compensation work area

Related Topics

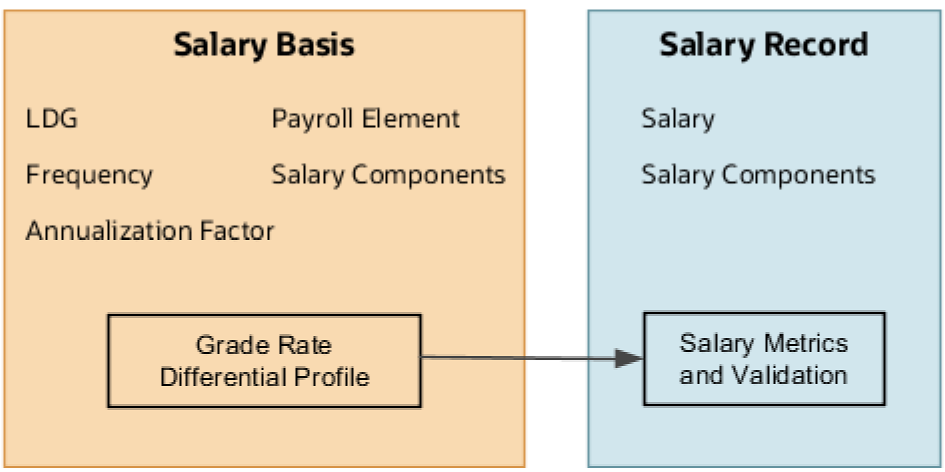
- Overview of Market Data

7 Base Pay Overview

Overview of Base Pay Configuration

Base pay is a person's salary amount. Managers and HR specialists view and adjust this amount or any component amounts or percentages over the course of someone's tenure in their organization. Each salary record that they manage has an associated salary basis. Here's how the salary basis configuration works with salary records and payroll processing.

- The frequency and annualization factor of the salary basis are used to calculate the annualized salary that appears on the salary record. These salary basis settings and the full-time equivalent value from the employment record are used to calculate the annualized full-time salary.
- Any salary components configured on the salary basis are used on the salary record to itemize salary adjustments for reports, such as merit and location.
- The payroll element associated with the salary basis holds the salary amount entered on the salary record. The basis passes that amount to payroll for processing.
- The grade rate and differential profile associated with the salary basis determine the salary metrics and validation messages people see on the salary record. Associating them with the salary basis is optional, so they aren't configured on every salary basis.



You configure grade rate, grade ladders, rate definitions, payroll elements using the **Base Pay** task list in the Compensation work area. You can also manage lookups, actions, and action reasons.

Related Topics

- How You Enable Salary Itemization Using Incremental Components
- How You Store the Salary Amount and Pass It to Payroll for Processing
- How Salary Metrics Are Calculated

How Salary Basis Options Work with Salary Amounts and Calculations

The interval used to quote and store salary, such as hourly or annually, is the frequency of the salary basis associated with the salary record. The annualization factor is the numeric multiplier for the frequency. Calculations use the factor and the salary amount to determine the annual salary amount, as these examples show.

Frequency	Annualization Factor	Salary (USD)	Annual Salary (USD)
Annually	1	50,000	50,000
Monthly	12	10,000	120,000
Hourly	2080	100	208,000

Related Topics

- Overview of Base Pay Configuration
- Examples of Annual Salary and Annualized Full-Time Salary Calculations
- How You Change a Salary to Account for a Changed FTE

How You Store the Salary Amount and Pass It to Payroll for Processing

The salary basis holds the overall salary amount from the salary record. It passes the amount to the element entry for payroll processing each pay period.

Legislative Data Group (LDG)

You configure each salary basis for a specified LDG. If your organization has multiple LDGs, you need to create a uniquely named salary basis for each unique set of characteristics applicable to each LDG. The LDG limits the payroll elements that you can associate with the salary basis.

Payroll Element

You attach a single payroll element to each salary basis to hold the overall salary amount. The elements that you can select from meet these criteria:

- They're valid for the selected LDG.
- They recur.

- They're classified as either **Earning** or **Information**.
- They include eligibility definitions.

  The required element eligibility definition can include eligibility criteria. We recommend that you leave the eligibility open on the payroll element.

Make sure that individual compensation doesn't also use the element you select. Using the same element across compensation objects can lead to payroll conflicts. It can also lead to unexpected deletions of salary or individual compensation.

Restrictions

You can link recurring elements to multiple salary bases only if they meet these conditions:

- Headquarters-based grades have a base pay of X.
- Grades for all other locations have a base pay of X - 2%.

Input Value

An element can have multiple input values. The element input value that you select in the salary basis, such as **Amount**, is the value that stores the salary amount.

The monetary amount stored in the element entry is the salary amount in the salary information for the person's assignment. That salary amount is in the frequency of the person's salary basis, such as annually or hourly.

If you don't use Oracle Fusion Global Payroll, you can store the salary amount using information payroll elements.

- If the element includes the **Periodicity** input value, the element entry stores the annual salary amount.
- If the element doesn't include the **Periodicity** input value, the element entry stores the salary amount in the same frequency as the salary basis.

Here's how the payroll formula processes the input values of element entries received in the frequency of the salary basis:

Salary Basis Frequency	Amount Passed to Payroll	Payroll Processing
Annually	Annual amount	Converts the annual amount to the appropriate payroll period amount.
Hourly	Hourly rate	Multiplies the hourly rate by the number of hours reported for the payroll period.

The resulting base pay earnings appear on the payslip for the payroll element associated with the salary basis.

Currency

The element currency automatically determines the salary basis currency, that the person's paid in.

Reference

The Configuring Payroll Elements for Use in Oracle Fusion Compensation document explains how compensation uses payroll elements. It also explains how to configure the elements for specific uses. The document (ID 1589502.1) is on My Oracle Support at https://support.oracle.com.

Related Topics

- Create Compensation Payroll Elements
- Overview of Base Pay Configuration

How You Populate a Salary Amount with a Rate from the Grade Ladder

Here's how you can populate someone's salary amount from grade ladder rates during HR actions that change their grade ladder, grade, or step. Examples of these HR actions are **Hire**, **Transfer**, and **Promote**.

1. Set up your rates using the **Progression Grade Ladders** task, not the **Manage Grade Ladders** task.
    - Set **Include Salary Updates** to **Yes**.
    - Set **Salary Calculation Method** to **Use grade step rate**.
2. Make sure that people have a salary basis with the salary basis type where the salary amount is determined by user or simple component. The grade ladder won't update the salary amount if you select any other salary basis type. You configure salary bases using the **Salary Basis** task.

    If you're using simple components, you need to include a **Progression grade ladder rate** component and set the **Optional** attribute to **No**. Progression processing drops all optional components so for all of the components you want the process to preserve, set the **Optional** attribute to **No**.
3. Include the Salary section in your HR action. You might need to configuration responsive pages using Transaction Design Studio in HCM Experience Design Studio.
4. Include the **Grade Ladder**, **Grade**, and **Step** attributes in your HR action. You need to configure responsive pages, using Transaction Design Studio in HCM Experience Design Studio.

    Exception: If your grades don't have steps, then you don't need to include the **Step** attribute in your HR actions.

Also, if you want to allow the proposed salary to be less than the current salary you need to configure global compensation settings. Use the **Configure Global Compensation Settings** task in the Setup and Maintenance work area. The task is part of the Compensation Management offering, Base Pay functional area.

1. On the Global Compensation Settings page, scroll to the Grade Step Progression section of the page.
2. In the Online Settings subsection, select the **Update salary if proposed salary is less than current salary** check box.

To see the salary amount when you hire someone, you need to select the salary basis as well as the grade ladder, grade, and step.

Related Topics

- How to Determine a Salary Amount

How Many Salary Bases to Create

You need to create a separate salary basis, for each unique combination of the following characteristics associated with a worker's base pay. A good practice if you require many salary bases in your organization is to use descriptive names. Examples are CA Hourly Wages, UK Annual Salary with Components, and Adjunct Pay 3 Credit Courses.

Legislative Data Group (LDG)

How many LDGs are in your enterprise? You can create salary bases within a particular LDG. You can't share salary bases across LDGs. Each salary basis name and each salary basis code must be unique within a legislative data group (LDG).

Frequency and Annualization Factor

How many different frequencies for quoting base pay are in use? People with multiple assignments on different payroll frequencies need to have a different salary basis associated with each assignment.

Do any of the frequencies have multiple annualization factors for base pay? Your number of salary bases increases by one for each additional annualization factor in each separate LDG.

Payroll Element and Currency

Do you want to use the same payroll element for different salary bases? You can do this if the element has these configurations:

- It's a recurring earnings element.
- It allows multiple entries in the same period.

How many currencies do you pay people in, within a single LDG? You need one payroll element for each currency within an LDG. You also need a separate salary basis for each payroll element.

Components

Do you want to itemize salary? You need one additional salary basis for each unique collection of components.

Grade Rates and Differential Profiles

How many grade rates are you using? The number of salary bases increases by one for each additional grade rate in use. You can reduce the number of grade rates by using a differential profile. Profiles with the compensation zone or compensation zone and business unit criteria can have grade rates configured instead of multipliers. The number of salary bases increases by one for each additional differential profile in use.

Rounding Rules and Decimal Precision

How many different salary amount rounding rules do you use? The number of salary bases increases by one for each additional rounding rule in use.

How many different decimal places do you display? The number of salary bases increases by one for each additional decimal precision in use.

Related Topics

- Salary Component Lookups
- Create Compensation Payroll Elements
- How Salary Basis Options Work With Salary Amounts and Calculations
- Grade Rates

Base Pay FAQ

Can I audit salary data?

Yes, after you enable audit for salary data using the **Manage Audit Policies** task.

8 Salary Basis

How to Determine a Salary Amount

You specify how a salary amount is determined when you select the salary basis type.

Salary Amount Is Determined by User

With this type, HR specialists or managers enter salary amounts, adjustment amounts, or adjustment percentages when changing salary. You can use this type to determine salary amounts using grade step progression.

Salary Adjustment Amount Is Determined by Incremental Components

With this type, HR specialists or managers itemize the salary adjustment using incremental components selected on the basis or that they select when changing salary. Only the first salary record itemizes the entire salary amount. All subsequent salary records itemize only the adjustment amount, using percentages or amounts.

> **CAUTION:** If you want to determine salary amounts using grade step progression, don't select this type of salary basis.

Example

On the first salary record, the HR specialist defines a 28,000 USD salary, as shown here.

Component	Amount
Base	20,000
Merit	5,000
Location	3,000

The next year, the manager adjusts that person's salary to 32,000 USD, as shown here.

Component	Adjustment Amount	Adjustment Percentage
Base	5,000	18
Merit	0	0
Location	-1,000	-0.04

Salary Adjustment Amount Is Determined by Simple Components

With this type, HR specialists or managers itemize salary changes using simple components. Each salary record maintains the individual simple component amount or percentage to add to or subtract from the overall salary simple component. The individual simple component amount can also be entirely independent from the overall salary.

You can use this type to determine salary amounts using grade step progression. Make sure to include a **Progression grade ladder rate** component and set the **Optional** attribute to **No**.

> **Tip:** To include all other components in grade step progression processing, be sure to set those **Optional** attributes to **No** also. Progression processing drops any optional components.

Example

On the first salary record, the HR specialist defines a 25,000 USD salary, as shown here.

Component	Amount
Base	20,000
Merit	5,000
Location	3,000

The next year, the manager adjusts that person's salary to 32,000 USD, as shown here.

Component	Amount	Adjustment Amount	Adjustment Percentage	Prior Value
Base	25,000	5,000	25	20,000
Merit	5,000	0	0	5,000
Location	2,000	-1,000	-33.33	3,000

Related Topics

- Overview of Base Pay Configuration
- Incremental Salary Component Lookups
- Simple Salary Component Lookups

Considerations for Using Salary Bases with Incremental Components versus Simple Components

When you configure salary bases, you can use incremental or simple components to itemize salary adjustments. The incremental and simple components that you can configure come from lookups and their values can be either an amount or a percentage. Consider these key differences when selecting the salary basis type.

Value on the Salary

For incremental components, a person has to enter the amount or percentage of the adjustment. The effect of these adjustments is incremental to the most recent salary amount.

For simple components, a person can enter an amount or a percentage. The percentage applies to the amount of another, specified, simple component. They can also enter the adjustment amount or percentage to apply to the previous simple component value. You can also configure the simple components to use specified default values or values provided by progression grade ladder rates. You can even configure simple components to use default values calculated by applying percentages to other specific simple components. For example, calculate a car or housing allowance as a percentage of a base salary.

The effect of simple component adjustments is incremental to the most recent simple component values.

Adjustment History

For incremental components, the adjustment applies only to the current salary record. For example, in 2001 someone gets a merit component of $100. In 2002, they get a $10 increase and in 2003, they get a $15 increase. Their salary history shows the merit component amount of $100 in 2001. And, it shows the adjustment amounts of $10 in 2002 and $15 in 2003. History doesn't show the calculated amount of $110 in 2002 or $125 in 2003.

For simple components, the adjustments apply to the current and future salary records. For example, in 2001 someone gets a simple merit component of $100. In 2002, they get a $10 increase and in 2003, they get a $15 increase. Their salary history for the simple merit component shows the amount of $100 in 2001, $110 in 2002, and $125 in 2003.

Salary history preserves simple components when the salary basis changes and both bases have the same simple component configured.

Visibility of Previous Amount

People and processes proposing salary changes can't see previous amounts or percentages for incremental components. They can see them for simple components.

Effect of Full-Time Equivalent (FTE)

When FTE changes, the incremental component values aren't adjusted by the new FTE. But for simple components, each value gets adjusted by the FTE.

Effect on Overall Salary

For incremental components, you can only add the individual values to the previous salary amount to determine the new overall salary.

For simple components, you can specify whether the individual values add to or subtract them from the overall salary amount. You can also configure individual values to be independent of the overall salary.

Required or Optional Behavior

For incremental components, you can configure a fixed set of incremental components that always show when people propose salary changes. Or, you can let them select the incremental components they want to use in their salary proposal, if any.

For simple components, you specify whether they're optional. People need to provide values for any required simple components when they propose salary changes. And, they can select the optional components they want to include, if any. Progression processing drops all optional components. For all of the components, you want the process to preserve, you need to set the **Optional** attribute to **No**.

Related Topics

- How to Determine a Salary Amount

Example Simple Component Configurations with People Entering Values and Fixed Percentages

Here are two examples of how you can configure simple components for people to enter amounts and percentages to add to the overall salary. You can also include simple components that are fixed percentages and are independent of the overall salary.

Example 1

The first example has three simple components that add to an overall salary component. It also has two fixed percentage components that are independent of the overall salary.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	User entered amount		Add		100,000
Housing	User entered percentage		Add	50%	50,000
Flexible benefit plan	User entered amount		Add		60,000
Annual gross pay	Overall salary				210,000

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Provident fund	Fixed percentage	Basic salary	None	12%	12,000
Gratuity	Fixed percentage	Basic salary	None	4.81%	4,810

Example 2

The second example also has three simple components that add to an overall salary component. And, it has three fixed percentage components that are independent of the overall salary.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	User entered amount		Add		100,000
Housing	User entered percentage		Add	40%	40,000
Special allowance	User entered amount		Add		60,000
Annual gross pay	Overall salary				200,000
Provident fund	Fixed percentage	Basic salary	None	12%	12,000
Gratuity	Fixed percentage	Basic salary	None	4.81%	4,810
Variable pay	Fixed percentage	Overall salary	None	20%	40,000

Related Topics

- How to Determine a Salary Amount

Example Simple Component Configurations with Grade Progression Rate, User Entered Values, and Fixed Percentages

Here are two examples of how you can configure simple components that provide salary from progression grade ladder rates. You can include simple components for people to enter amounts and percentages that also add to the overall salary. And, you can include simple components that are fixed percentages that add to the overall salary or are independent of it.

Example 1

The first example has five simple components that add to an overall salary component.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	Grade progression rate		Add		100,000
Housing	Fixed percentage		Add	50%	50,000
Flexible benefit plan	User entered amount		Add		60,000
Provident fund	Fixed percentage	Basic salary	Add	12%	7,200
Gratuity	User entered percentage	Basic salary	Add	5%	5,000
Total cash	Overall salary				222,200

Example 2

The second example also has five simple components that add to an overall salary component. And, it has a fixed percentage component that's independent of the overall salary.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	Grade progression rate		Add		100,000
Housing	Fixed percentage		Add	50%	50,000

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Flexible benefit plan	User entered amount		Add		60,000
Provident fund	Fixed percentage	Basic salary	Add	12%	7,200
Gratuity	User entered percentage	Basic salary	Add	5%	5,000
Total cash	Overall salary				222,200
Variable pay	Fixed percentage	Basic salary	None	20%	44,440

Related Topics

- How to Determine a Salary Amount

How You Enable Salary Itemization Using Incremental Components

You can enable itemization that lets HR specialists and managers reflect the different reasons for salary changes, such as merit or location. Use the **Salary Basis** task in the Compensation work area.

Incremental Component Configuration

Here are the key settings for the salary basis that let you include salary components for itemization.

Field	Value
Salary Basis Type	Salary adjustment amount is determined by incremental components.
Components to Display When Adjusting Salary	Either of these: • Select specific incremental components to display during allocation. • Enable incremental component selection during allocation.

You add incremental salary components or can change the available components by editing the **CMP_SALARY_COMPONENTS** lookup type. Use the **Manage Common Lookups** task in the Compensation work area.

Incremental Component Processing

When values change for incremental salary components, the payroll element associated with the salary basis holds the new salary amount calculated from the component adjustments. Payroll doesn't receive individual component values for processing.

Example

The person's current salary is **50,000 USD**. Their manager enters incremental component adjustment percentages and salary calculations determine the monetary amounts, as shown here. The calculations then sum the monetary amounts and the original salary amount to determine the new salary amount of **60,000 USD**. Here's the equation:

```
(5,000 + 3,000 + 2,000 + 50,000)
```

Salary Component	Adjustment Percentage	Calculated USD
Merit	10	5,000
Promotion	6	3,000
Adjustment	4	2,000

Related Topics

- Incremental Salary Component Lookups

Rounding Rules, Salary Amounts, and Decimal Places to Display

You can specify separate rounding rules for the salary amount, annualized values, and salary ranges on a salary basis. You can also specify the decimal places to show for all numeric salary values that you see on the salary record. Use the **Salary Basis** task in the Compensation Management work area.

Rounding Rules and Usages

Here's how amounts and ranges use each rounding rule.

Rounding Rule	Usage
Salary amount	Used by calculations that include the salary amount, for example: • To increase a salary using a percentage, such as 3.5% • To convert the salary to a different frequency, such as from monthly to annually • To prorate the salary based on a specific full-time equivalent, such as from 1 FTE to 0.5 FTE

Rounding Rule	Usage
Annualized values	Determines how the annual salary and annualized full-time salary amounts appear.
Salary range	Determines how salary ranges appear and when calculating revised salary ranges, for example: • To convert the salary range from one frequency to another • To apply salary differentials

The rounding rules always affect amounts and values from when you set them and onward. They don't affect previously calculated amounts and values. To ensure consistency across historical and current salary amounts, create another salary basis with new rules instead of editing an existing salary basis. Then, update the salary records with this new salary basis from a specific date. You can use loading tools, such as HCM Data Loader and HCM Spreadsheet Data Loader to make this transition seamless. Be sure to set the old salary basis to **Inactive**. This way it's no longer available for people to add it as part of their salary proposals.

Rounding Rule Place and Decimal Place to Display

We recommend that you match the decimal place of your salary amount rounding rule with the decimal place to display. Here's what happens when the decimal and rounding rule places don't match.

Mismatch Issue	Example Scenario	Example Results
If the decimal place to display is longer than your rounding rule place, salary amounts have extra zeroes at the end.	Salary amount: 15.7923234 Decimal place to display: 4 Rounding rule: Nearest .01	Calculations round the amount to 15.79 and salary pages display the amount as 15.7900.
If the decimal place to display is shorter than your rounding rule place, salary amounts are truncated.	Salary amount: 15.7923234 Decimal place to display: 2 Rounding rule: Nearest .0001	Calculations round the amount to 15.7923 and salary pages display the amount as 15.79.

Payroll element entries ignore the decimal place to display from the salary basis because the elements always use the decimal place of the currency definition. For example, US currency is defined to 2 decimal places. Even if you set your salary amount display to 4 places, the element entries round the amount to 2 places.

Related Topics

- Overview of Base Pay Configuration
- Can HCM Data Loader round salary amounts when it loads salary information

Salary Basis FAQs

Can I change or delete a salary basis that's in use?

No. After you associate the salary basis with anyone, you can't delete or change any characteristic.

Can I add effective-dated changes to the salary basis?

No because the salary basis isn't an effective-dated object.

Where does the annualization factor for a salary basis that uses payroll period frequency come from?

The period type on the payroll linked to a person's assignment determines the number of payroll periods in a year. These payroll periods are the annualization factor.

Can I use the same payroll element for multiple salary bases?

Yes, if it's a recurring element that you classify as an earnings element and configure to enable multiple entries in the same period.

Related Topics

Can I update an element mapped to a salary basis that's in use?

Yes, but the updated element or input value is recognized only on the next salary change. At that time, salary processing end dates the element entry associated with the prior salary.

When you update the element mapping, no changes apply to the person's data.

Can managers change the salary basis of a salary record?

Yes. You can hide or show the edit capability for managers using personalization on the pages where managers enter salary allocations.

9 Salary Ranges and Metrics

How You Validate Salary Changes with the Grade Range

You can verify that salary changes fall within the appropriate range for each person using grade range validation. This validation generates a warning message when someone enters a new or adjusted salary that's outside the person's assignment grade range. The person can ignore the message or revise the salary to fall within the valid range.

The assignment grade in the grade rate attached to the salary basis defines the minimum and maximum grade range values. You can adjust the base ranges by linking a differential profile to the salary basis. Differentials apply according to one of these criteria:

- Location
- Business unit
- Location and business unit
- Compensation zone
- Compensation zone and business unit

You can also associate grade rate differentials that override the grade rate, and thus the grades and grade ranges, associated with the salary basis. The grade rate from the differential profile has to have corresponding grades for all the grades of the grade rate linked to the salary basis.

Related Topics

- Overview of Salary Range Differentials
- Grade Rates

How You Populate a Salary Amount with a Rate from the Grade Ladder

Here's how you can populate someone's salary amount from grade ladder rates during HR actions that change their grade ladder, grade, or step. Examples of these HR actions are **Hire**, **Transfer**, and **Promote**.

1. Set up your rates using the **Progression Grade Ladders** task, not the **Manage Grade Ladders** task.
    - Set **Include Salary Updates** to **Yes**.
    - Set **Salary Calculation Method** to **Use grade step rate**.
2. Make sure that people have a salary basis with the salary basis type where the salary amount is determined by user or simple component. The grade ladder won't update the salary amount if you select any other salary basis type. You configure salary bases using the **Salary Basis** task.

    If you're using simple components, you need to include a **Progression grade ladder rate** component and set the **Optional** attribute to **No**. Progression processing drops all optional components so for all of the components you want the process to preserve, set the **Optional** attribute to **No**.

3. Include the Salary section in your HR action. You might need to configuration responsive pages using Transaction Design Studio in HCM Experience Design Studio.
4. Include the **Grade Ladder**, **Grade**, and **Step** attributes in your HR action. You need to configure responsive pages, using Transaction Design Studio in HCM Experience Design Studio.

   Exception: If your grades don't have steps, then you don't need to include the **Step** attribute in your HR actions.

Also, if you want to allow the proposed salary to be less than the current salary you need to configure global compensation settings. Use the **Configure Global Compensation Settings** task in the Setup and Maintenance work area. The task is part of the Compensation Management offering, Base Pay functional area.

1. On the Global Compensation Settings page, scroll to the Grade Step Progression section of the page.
2. In the Online Settings subsection, select the **Update salary if proposed salary is less than current salary** check box.

To see the salary amount when you hire someone, you need to select the salary basis as well as the grade ladder, grade, and step.

Related Topics

- How to Determine a Salary Amount

Salary Range Violation Behavior for Proposed Salaries

You can specify how to handle salary range violation for various compensation actions, such as **Change Salary** and **Salary History**. This handling also applies to Offer and HR actions that include the Salary section, such as **Offer**, **Hire**, **Promote**, and **Transfer**. You configure violation behavior using the **Salary Range Violation Behavior** field of the salary basis.

You can let people propose salaries that violate the salary range with or without a warning. Or, you can prevent people from proposing any salaries that violate the salary range. For example, you warn people when their proposed salaries are under or over the specified salary range. Or, you don't let anyone propose salaries that are under or over the specified salary range.

The default value for the **Salary Range Violation Behavior** field of all existing salary bases is **Warn**. We don't recommend that you change it to Error for existing salary bases because you can get errors with historic data. For example, you have an existing salary basis with a salary range of 100 to 200 USD. The salary basis is associated with a 2010 salary record where the salary amount was 95 USD. It's also associated with a 2015 salary record where the salary amount was 105 USD. When you change the violation behavior to **Error** and try to load salary for 2020, you can get the violation error for 2010. The error occurs even though that's not the record you're correcting. If you want to set the violation behavior to **Error**, then we recommend that you create another salary basis to use with new salaries. This way, you can avoid issues with historic data.

When you set the violation behavior to **Warn**, you don't see the warning message when you load salaries using these tools: REST API, HCM Data Loader, and HCM Spreadsheet Data Loader. These tools show you only errors. The **Download Salaries** task and grate step progression processes ignore this violation behavior.

Related Topics

- Overview of Base Pay Configuration
- How You Validate Salary Changes with the Grade Range
- Overview of Salary Range Differentials
- How Salary Metrics Change According to the Grade Rate and Salary Range Differentials

How Salary Metrics Are Calculated

The salary amount has a date while the full-time equivalent (FTE), grade, grade rate, and differential profile have effective dates. Thus, a salary record can have logic for multiple combinations of FTE, grade, grade rate, and differential to apply for different time periods. So, how are salary metrics, such as compa-ratio, range minimum, and range maximum, calculated? The metric calculations use a reference date. Here's how we determine that date:

- If the salary record has an end date that's earlier than the current date, then use the salary end date.
- If the start date of the salary record is in future, then use the salary start date.
- If the salary record started in the past and doesn't have an end date, then use the current system date.

Related Topics

- How Salary Metrics Change According to the Grade Rate and Salary Range Differentials

10 Salary Range Differentials

Overview of Salary Range Differentials

You can configure salary range differentials to adjust base salary ranges from the grade rate associated with the salary basis. Differentials vary, for example, to reflect the cost of living in different locations or the relative ease of hiring. For example, you want to pay everyone working on the East Coast of the US at 1.1 times the standard grade rate. You want to pay everyone working on the West Coast at 1.2 times. You pay Central people the standard grade rate and everyone in the South at 0.8 times.

Select the level of granularity that best supports your salary policies and processes:

- Location
- Business unit
- Location and business unit
- Compensation zone
- Compensation zone and business unit

Here are some additional configurations you can do with the compensation zone and compensation zone and business unit differentials:

- You can configure grade rate versions to override the grade rate of the salary basis. The adjusted salary range is the range of the overriding grade rate.
- You can configure the differentials to enforce relevant statutory limits around minimum salaries by setting lower limits. Also optionally specify which address types to use to identify the applicable differential. For example, you're going to associate the differentials with people who work at client sites and from home. And, you want to use their remote addresses, rather than their work addresses to identify their compensation zones and differential factors.

Compensation Zone Types

You use zone types, such as compensation or wage regions, to categorize zones and group them together. You need to create your zone types before you define one or more zones for a geographical boundary. You can create a zone type that contains geographical boundaries from anywhere in the world, or that contains only geographies in a specified country. When you create a zone type for a country, you can define which geography types or geographies you can select when you create the zones.

Compensation Zones

Zones are geographical boundaries for a zone type, for example, the San Jose compensation zone. Zones are based on the geography hierarchy data of the master reference. You create zones in a zone type and you can associate geographies to define the zone. For example, you have the Compensation Regions zone type. You create a West Coast zone that has the state of California as one of its geographies. In a geography, you can specify a postal range. So for the state of California, for example, you can specify that the zone spans the postal codes 90001 through 90011.

Reference

The Salary Range Differentials and Compensation Zones document explains how salary range differentials are processed. It also explains how to configure and apply zone-based differentials. The document (ID 2605772.1) is on My Oracle Support at https://support.oracle.com.

Related Topics

- Configure Salary Range Differentials
- Configure Compensation Zone Types and Zones
- How Salary Metrics Are Calculated
- How Salary Metrics Change According to the Grade Rate and Salary Range Differentials

Configure Compensation Zone Types and Zones

Here's how you configure the compensation zone types used to group zones together and the zones that make up a zone type. Use the **Compensation Zones** task in the Compensation Management offering, Base Pay functional area.

Create the Compensation Zone Type

We recommend limiting the number of compensation zone types, preferably to 1, such as by postal code. Here's how you create a zone type:

1. On the Manage Zone Types page, click the **Create** icon.
2. Enter a name for the zone type.
3. Specify the boundary of the zone type.
4. Select the geography.
5. At the appropriate geographic level, such as **Postal Code**, select **Zone Creation Allowed**.

CAUTION: You need to make sure that geography validation is enabled for the **No Styles Format** address style of the selected geography level. Use the **Manage Geographies** task and the **Manage Geography Validation** action.

Create a Zone

Configure your zones so that an address is part of only one zone. If an address is part of multiple zones, the salary changes that include zone-based differentials can't figure out which zone applies. Thus, they can't apply any differential. Also, configure the zones for a zone type at the same level to minimize or prevent zone overlaps. For example, if **Zone 1** is at the **State** level, then define the other zones at the **State** level also.

Here's how you create a zone:

1. On the Manage Zone Types page, search for and select your new zone type. If you click the zone type, you open a read-only page with details of the zone type configuration. You can't add zones from that page.
2. Click **Next**.
3. On the Manage Zones for Zone Type page, click the **Add** icon.
4. On the Create Zone page, enter the general information.
5. Associate geographies with your new zone.

  a. Click the **Add** icon.
  b. On the Add Geography dialog box, search for and select the geography that you want to add.
  c. Click **Save and Close**.
  d. Review the start dates of the associated geographies. When you associated the geography, it automatically set the start date to the system date at that time. You can edit the date, as needed.
  e. When you finish associating geographies, on the Create Zone page, save and close your new zone.
6. When you finish adding zones to your zone type, on the Manage Zones for Zone Type page, save and close your zone type.

Reference

The Salary Range Differentials and Compensation Zones document explains how salary range differentials are processed. It also explains how to configure and apply zone-based differentials. The document (ID 2605772.1) is on My Oracle Support at https://support.oracle.com.

Related Topics

- Overview of Salary Range Differentials
- Configure Salary Range Differentials
- Setting Up Geography Validation
- How Salary Metrics Change According to the Grade Rate and Salary Range Differentials

Configure Salary Range Differentials

Here's how you configure salary range differentials using the **Salary Range Differentials** task in the Compensation work area.

1. On the Salary Range Differentials page, click the **Create** icon.
2. On the Create Salary Range Differential page, in the Properties section, complete the required fields.
3. Select the criteria, such as **Location** or **Compensation Zone**.
4. Select the type.
5. In the Differentials section, configure the differentials. When your criteria is compensation zone based, you can select a **Type** of **Factor** or **Grade Rate**.
   - Select **Factor** to configure the differential to apply factors to the existing grade rates.
   - Select **Grade Rate** to configure the differential to apply alternate grade rates in place of the grade grate associated with the salary basis.
6. Optionally, for differentials that use compensation zone criteria, enable remote worker address type checking. Specify up to three address types to check in the order that differential processing should consider them. The process stops checking as soon as it finds an address, whether that address is in the first address type or the last.
7. Save and close the differential.

Reference

The Salary Range Differentials and Compensation Zones document explains how salary range differentials are processed. It also explains how to configure and apply zone-based differentials. The document (ID 2605772.1) is on My Oracle Support at https://support.oracle.com.

Related Topics

- Overview of Salary Range Differentials
- Configure Compensation Zone Types and Zones
- How Salary Metrics Change According to the Grade Rate and Salary Range Differentials

Generate Compensation Zone and Address Mapping

For salary range differentials with compensation zone criteria, differential processing has to find the zone and zone type each time someone views and adjusts the salary amount. The process does this by evaluating the addresses maintained for the person against the defined compensation zones. This evaluation can be time consuming, depending on the number of zones, zone types, and address details.

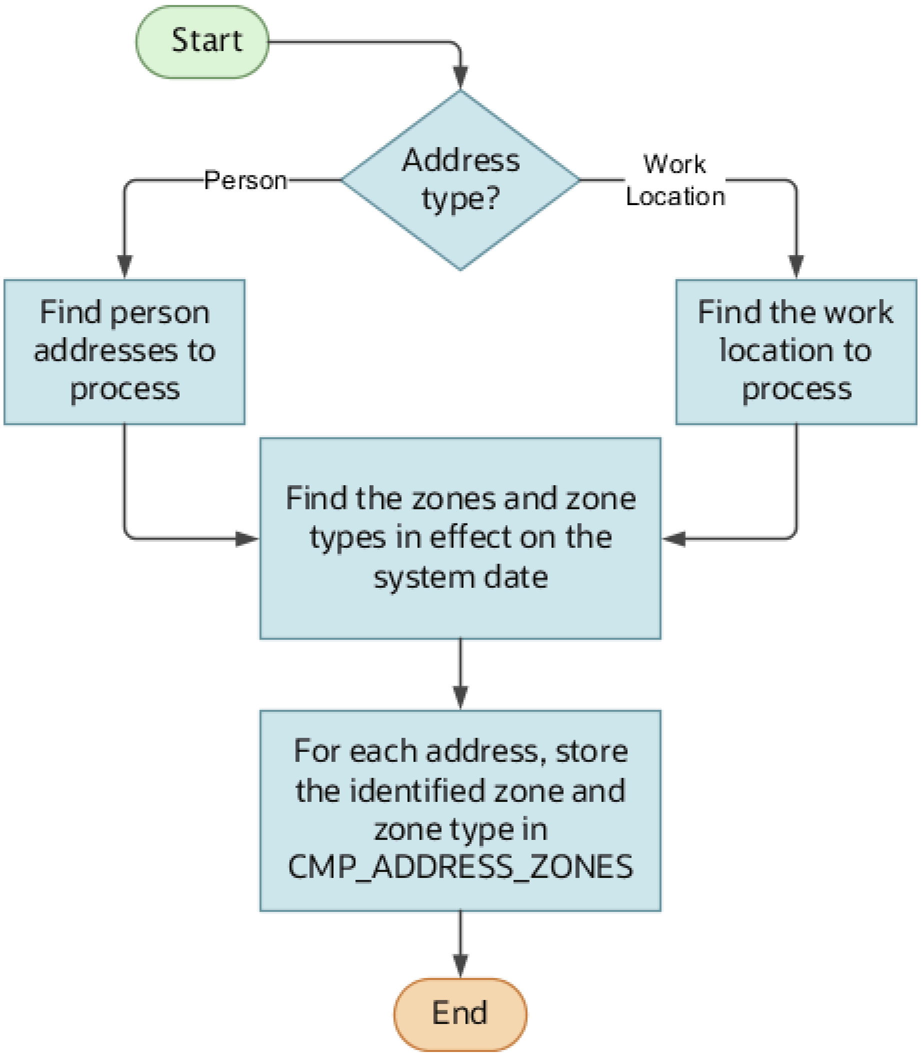
To see correct salary ranges in Oracle Transactional Business Intelligence reports and to optimize differential processing, run the **Generate Compensation Zone and Address Mapping** process. You can run the process in two modes.

Run Mode	Descriptions
Create incremental mappings	Creates mappings between zones and zone types that match the specified parameters and person or work location addresses when something changed or is new
Purge and recreate mappings	Purges all existing mappings Creates the maps again between the zones and zone types that match the specified parameters and all person or work location addresses

Here's how we recommend that you schedule the process.

Schedule Mode	Descriptions
One-Time	Run the mapping process to create all zone mappings for both work location and person addresses. You might use this mode to create a baseline. You might also use it to update work location addresses because they change infrequently.
Recurring	Schedule the mapping process to run on a regular basis to create incremental zone mappings. You might use this mode to update person addresses for remote workers because they can change more frequently. For example, client work locations change as the person moves changes projects.

The generated mappings improve the performance of responsive pages with salary information. The differential process knows the person's compensation zone and can apply the relevant differential to salary range calculations. Here's the high-level process flow.



When the mapping isn't available, differential processing finds the zone and zone type for the person or work address. It then applies the relevant differential.

Reference

The Salary Range Differentials and Compensation Zones document explains how salary range differentials are processed. It also explains how to configure and apply zone-based differentials. The document (ID 2605772.1) is on My Oracle Support at https://support.oracle.com.

Related Topics

- Overview of Salary Range Differentials
- Configure Compensation Zone Types and Zones

11 Base Pay Lookups and Troubleshooting

Incremental Salary Component Lookups

HR specialists and line managers can use incremental salary components to itemize new or adjusted salary, to reflect the different reasons for their allocations. Here are the incremental components bundled in the implementation:

- Adjustment: Regular and automatic adjustment
- Cost of Living
- Equity: Adjustment to correct salary compression or inversion
- Location
- Market: Adjustment due to salary being out of line with the market
- Merit
- Promotion
- Progression: Regular and automatic adjustment
- Structured: Adjustment dictated by union or employment contract, such as an increase after 3 months

You can change or add components to the **CMP_SALARY_COMPONENTS** lookup type to better support your reporting policies for salary allocations. Use the **Manage Common Lookups** task in the Setup and Maintenance work area.

Itemization

Incremental component itemizations are stored and used to calculate new salary. When component values change, the payroll element holds the new salary amount calculated from the component adjustments. But it doesn't receive individual component amounts for processing. The incremental values entered in the salary record apply only to that record and don't apply to any future salary records.

Related Topics

- How You Enable Salary Itemization
- Overview of Lookups

Simple Salary Component Lookups

HR specialists and line managers can use simple salary components to itemize new or adjusted salary, to reflect the different reasons for their allocations. Here are the simple components bundled in the implementation:

- Basic salary
- Housing allowance
- Special allowance
- City allowance

- Transport allowance
- Travel allowance
- Wage progression rate
- Variable allowance
- Overall salary

You can change or add components to the **ORA_CMP_SIMPLE_SALARY_COMPS** lookup type to better support your reporting policies for salary allocations. Use the **Manage Common Lookups** task in the Setup and Maintenance work area.

Itemization

Simple component itemizations let you maintain the values for the components and you typically configure them to calculate new salary. When simple component values change, the new salary amount is recalculated. The payroll element holds this new salary amount, but it doesn't receive individual component amounts for processing.

Related Topics

- How to Determine a Salary Amount
- Overview of Lookups

Troubleshoot Salary-Related Issues

Here are some salary-related issues that may occur and solutions to help you fix them.

Issue	Solution
The salary element entry wasn't created.	The element associated with the salary basis won't be created if inconsistencies exist between the element eligibility and the payroll data of the person's assignment. Using the **Element Entries** task in the **Person Management** work area, set the **Effective Date** to same date as the salary start date. Then search for the salary basis element in the **Element Name** column. If you don't see the element listed, the person isn't eligible for the element. You need to verify the eligibility and effective dates configured for the element.
The salary ranges are incorrect for an hourly person.	Check the annualization factor of the grade rate associated with the salary basis. The annualization factors for the salary basis and grade rate might differ, even if the frequency for both is Hourly. Salary range calculations use the frequencies and factors of the salary basis and the grade rate. If they don't match, the calculations convert grade rate values to those of the salary basis.
Salary changes are stuck in the approval flow. An individual's salary page has a message that's something like this: **Changes to this data are pending approval**. HR specialists and compensation managers or administrators don't have a **Withdraw** option for the transaction in their worklist. And sometimes, the person record gets locked after changing the salary.	Ask the person who submitted the salary change to use their worklist to withdraw the change. They can also see who the current approver is, so they can ask the approver to approve or reject the proposed changes. If you still see the pending approval notification in the **Change Salary** flow, your approvals administrator can use the transaction console to cancel the change. If you still see the pending approval, have your help desk log a bug with Oracle Support. The bug should be for the Salary component of Oracle Fusion Workforce Compensation.

Issue	Solution
Salary notifications are blank.	The person may have a custom role. Add the **Approve Salary Updates** privilege to their application role. Or, add these three resources to a custom entitlement and add the entitlement to their application role. • HcmDetectCompletedTransaction.xml • ChangeSalaryApprovalTask_TaskFlow.xml • ChangePayNtfsFlow.xml
The salary details in notifications are blank. People need to see salary information, but not make any changes.	The person probably doesn't have a compensation role. Depending on whether they should have read-only or read and write accesses to the salary details, add one of these job roles: • View Salaries • Manage Salaries For detailed solution steps, see Salary Details Are Not Visible in Approval Notifications - You Don't Have Permission to Access this Information (document ID 2212593.1). The document is on My Oracle Support at http://support.oracle.com.
	Grant them access to the **Compensation Info** task, which they can review salary information. Reserve the **Change Salary** role for the people who need to manage the salary data.

12 Grade Step Progression Configuration

Overview of Grade Step Progression

To move workers automatically from one grade or grade and step to the next level in a grade ladder, you can use grade step progression. Here's the basic process for managing the progression:

1. Optionally, create progression grade ladder groups using the **ORA_CMP_GSP_GRADE_LADDER_GRP** lookup. You can associate progression grade ladders with a group.
2. Create the progression grade ladder.
    a. Configure the ladder and salary update details.
    b. Add grades and steps.
    c. Add progression rules at the ladder, grade, and step level.

    You can also create and update progression grade ladders, with and without steps using HCM Data Loader. Guidelines and examples for how to do this are in the Integrating with HCM guide, Loading Compensation Objects chapter. You can also see Using HCM Spreadsheet Data Loader to Add Progression Attributes to Grade Ladders (Document ID 2569831.1) on My Oracle Support (support.oracle.com).
3. Configure and submit the **Run Grade Step Progression** process to run according to your policies, such as daily, weekly, or monthly. You can configure the process to run for a single ladder or a group of ladders.
4. Review and accept or reject the progression process results. If you configured the process to automatically confirm progressions, then you won't need to accept them.
5. Update progression grade ladder rates as appropriate, such as for new contracts.
6. Configure and submit the **Synchronize Grade Step Rates** process to run for a single ladder or a group of ladders.
7. Review and accept or reject the synchronize process results. If you configured the process to automatically confirm synchronizations, then you won't need to accept them.

Reference

For more information about troubleshooting grade step progression issues, see Troubleshooting Grade Step Progression (document ID 2753020.1) on My Oracle Support at https://support.oracle.com.

Related Topics

- Create a Progression Grade Ladder
- Overview of Grade Step Progression Processing
- Overview of Proposed Progression and Salary Updates
- How You Populate a Salary Amount with a Rate from the Grade Ladder
- Guidelines for Loading Progression Rules

Create a Progression Grade Ladder

Here's how you create a progression grader ladder. All of the tasks you need are in the Compensation work area.

Before You Start

Make sure that you finish these tasks before you create the progression grade ladder:

- The group that you want to associate the ladder with exists. Selecting a group for the ladder is optional, but if needed, add the group to the **ORA_CMP_GSP_GRADE_LADDER_GRP** lookup using the **Lookups** task.
- The grades exist. If needed, create them using the **Grades** task.
- The progression rules exist. If needed, create participant eligibility profiles using the Eligibility Profiles task.

Create the Ladder

Here's how you create the ladder using the **Progression Grade Ladder** task:

1. On the Progression Grade Ladders page, click **Create Grade Ladder**.
2. On the Create Progression Grade Ladder page, Progression Ladder tab, complete the ladder details. Here's some key considerations when making certain selections.

Field	Considerations
Grade Type	Specify whether the grade ladder has only grades or grades with steps. Your selection filters the **Progression Increment** choice list options.
Progression Increment	When **Grade Type** is **Grade**, you can specify whether to evaluate only the next grade in the ladder or all grades. When **Grade Type** is **Grade with step**, you can specify how many steps to evaluate and whether to stop at the ceiling step.
Transaction Date	Set the date for the updated salary record created by the **Run Grade Step Progression** process. To make it the same date as the effective date of the process, select **Process run date**.
Confirmation Type	To have people accept or reject proposed progressions as part of their review, select **Manual**. To have the **Run Grade Step Progression** process accept the proposals and updates as part of its processing, select **Automatic**.
Assignment Action	People use your selection when they configure the **Run Grade Step Progression** process and don't select the assignment action.
Grade Ladder Group	To include the ladder with other progression grade ladders in a single batch for progression processing, select the appropriate group.

3. Complete the salary update details. Here's some key considerations when making certain selections.

Field	Considerations
Include Salary Updates	You're specifying how the Run Grade Step Progression process updates a person's assignment and salary records. The selection applies to every HR action that changes the person's grader ladder, grade, or step. These actions include when they're hired, transferred, or promoted. ◦ **No** (default): The process updates the grade or step value on the assignment, but not the salary amount. ◦ **Yes**: The process updates the grade or step value on the assignment record. It also updates the salary record with the associated rate from the grade or step. When you select **Yes**, you can configure additional attributes related to salary updates and rate synchronization.
Salary Calculation Method	To calculate salary using the rates from your progression grade ladder, select **Use grade step rate**.
Transaction Date	To use the assignment date as the date for the updated salary record the **Run Grade Step Progression** process creates, select **Grade step change date**.
Salary Adjustment Type	To prorate the rates from the grade ladder based on the value of the FTE on the person's assignment, select an adjustment type. The selection affects salary amounts during progression processing and salaries populated in HR actions, such as **Hire**, **Promote**, and **Transfer**.

4. Complete the rate synchronization details. Here's some key considerations when making certain selections.

Field	Considerations
Transaction Date	Set the date for the updated salary record created by the **Synchronize Grade Step Rates** process: ◦ To make it the same date as the effective date of the process, select **Process run date**. ◦ To make it the same date as when the rate changed on the grade ladder, select **Grade step rate change date**.
Confirmation Type	To have people accept or reject salary updates as part of their review, select **Manual**. To have the **Synchronize Grade Step Rates** process accept the proposals and updates as part of its processing, select **Automatic**.

Add Grades

Here's how you add a grade on the Create Progression Grade Ladder page, Grades and Steps tab:

1. On the **Actions** menu, select **Add Grade**.
2. On the Add Grade dialog box, search for and select the grade to add. The value you select for Progression Increment determines which grades you see in the list--basically, if the grades have steps or not.
3. Enter the sequence for where to position the grade on the grade ladder.
4. To see any existing steps, expand the grade. The **Expand** icon isn't present if no steps exist.
5. Add a value for each step of the grade.

Add Rules at the Ladder, Grade, and Step Levels

Here's how you add rules on the Create Progression Grade Ladder page, Progression Rules tab:

1. Optionally, in the Grade Ladder Rules section, add progression rules that apply to the entire grade ladder.
2. In the Grade Rules section, add the rule that applies to the grade. If the grades have steps, you may want to add rules at the step level rather than the grade level.
3. Optionally, add the progression rule that applies to a specific step.
4. Save your changes.
5. To add rules to the remaining grades in the ladder, repeat steps 2 through 4.
6. When you finish adding rules, save and close the progression grade ladder.

Validate the Progression Grade Ladder

To validate a progression grade ladder, on the Actions menu for the ladder, select **Validate**. You need to fix any validation errors before your ladder can be processed as part of grade step progression or rate synchronization.

Related Topics

- Progression Grade Ladder Details Transaction Date
- Salary Update Details Transaction Date
- Rate Synchronization Details Transaction Date
- Overview of Grade Step Progression
- Overview of Grade Step Progression Processing

Progression Increment Options in Grade Step Progression

The **Run Grade Step Progression** process uses progression rules to move eligible people to a higher grade or step. You determine how the process evaluates the progression rules with the progression increment that you select.

Grade

These increment options are available after you set **Grade Type** to **Grade**.

Progression Increment	The Grades and Steps Evaluated for Progression
Grade	The process evaluates all grades above the current grade, up to the last grade in the grade ladder. It places the person on the lowest grade that the progression rules determine they're eligible for.
Next grade in grade ladder	The process only evaluates one grade, the one above the current grade.

Grade with Steps

These increment options are available after you set **Grade Type** to **Grade with steps**.

Progression Increment	The Grades and Steps Evaluated for Progression	Ceiling Step
Grade and step	The process evaluates all steps above the current step, up to the last step in the grade ladder. It places the person on the lowest step that the progression rules determine they're eligible for.	The process ignores the ceiling step.
All steps in grade, stop at ceiling	The process evaluates all steps in the grade above the current step, up to and including the ceiling step. It places the person on the lowest step that the progression rules determine they're eligible for.	If the assignment is at or above the ceiling step, the process doesn't evaluate it for progression.
Next step in grade, stop if ceiling	The process only evaluates one step: the one above the current step.	If the assignment is at or above the ceiling step, the process doesn't evaluate it for progression.
Next step in grade ladder	The process only evaluates one step: the one above the current step.	The process ignores the ceiling step.

Related Topics

- Overview of Grade Step Progression Processing

Examples of Adding Progression Rules

You can enable or restrict progression between grades and steps using progression rules. You configure the rules using the Eligibility Profiles task. For progression rules, you want to create participant profiles with either the Global or Compensation usage. You associate these rules with progression grade ladders using the Progression Grade Ladder task.

These scenarios show at what level you apply various rules to enable or restrict progression.

Minimum Time Required to Progress

You want factory workers to progress automatically though steps. You create a progression grade ladder with step-level rules that define how much time has to elapse between progressions. Here's how you apply the rules in the ladder.

Rule Level	Example Rule
Ladder: Western Region Manufacturing	None
Grade: Job Assembly II	None
Step 1	6 Months in a Step
Step 2	6 Months in a Step
Step 3	6 Months in a Step

Performance Rating Required to Progress

You want administrative workers to progress to the next grade level only if their performance evaluation meets or exceeds expectations. You create a progression grade ladder where the final step for each grade includes a progression rule that evaluates worker performance. Here's how you apply the rules in the ladder.

Position	Example Rule
Ladder: Support Services	None
Grade: Administrative Clerk I	None
Step 1	6 Months in a Step
Step 2	6 Months in a Step
Step 3	6 Months in a Step Meets or Exceeds Evaluation

Certification Required to Progress

You don't want programmers to progress to the next step unless they have a technical certificate. You create a progression grade ladder that requires a certificate to progress to the next step. Here's how you apply the rules in the ladder.

Position	Example Rule
Ladder: Software Developers	None
Grade: Programmer III	None
Step 1	Java SE Fundamentals Certificate
Step 2	Java SE Advanced Certificate
Step 3	Java SE Optimization Certificate

Related Topics

- Eligibility Profiles

13 Transaction Dates and On Eligibility in Grade Step Progression Processing

Progression Grade Ladder Details Transaction Date

The **Run Grade Step Progression** process sets the start date of the updated assignment. It uses the specified **Transaction Date** option in the Progression Grade Ladder Details section of the Progression Grade Ladder page. Here's how each option affects the start date of an updated assignment.

Option	Start Date the Process Sets for the Updated Assignment
Process run date	The effective date set when you submit the **Run Grade Step Progression** process.
On eligibility	The date in the specified evaluation period when the person met the eligibility criteria. Details are available in the On Eligibility Option for Grade Step Transaction Date topic.
Start of next month	The day 1 of the month after the effective date. For example, if the effective date of the process is **January 15, 2021**, the start of next month date is **February 1, 2021**.
Start of next pay period	The first day of the pay period beginning after the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is **January 15, 2021**, the start of next pay period date is **January 16, 2021**.
Start of current pay period	The first day of the pay period that includes the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is **January 15, 2021**, the start of current pay period date is **January 1, 2021**.
Use formula	The date returned by the specified formula.

Related Topics

- Effective and Transaction Dates in Grade Step Progression Processing
- On Eligibility Option for Grade Step Transaction Date
- Create a Progression Grade Ladder
- Overview of Grade Step Progression Processing
- Run Grade Step Progression Process

On Eligibility Option for Grade Step Transaction Date

When **Transaction Date** is **On eligibility**, the update assignment transaction date is the actual date in the specified period when the person met the eligibility criteria. You specify the period using the **Effective Date** and eligibility look-back period parameters when you submit or schedule the **Run Grade Step Progression** process.

Specify the Period

To run the process for a specific evaluation period, set the end date of the period by selecting an effective date. Set the start date of the period by selecting an eligibility evaluation start date. For example, you want the process to evaluate eligibility for all dates from August 2 through 15, 2021. You set **Effective Date** to **August 15, 2021** and **Eligibility Evaluation Start Date** to **August 2, 2021**. For a person who meets the eligibility criteria on August 2, the process sets the assignment transaction date to **August 2, 2021**. For a person who meets the eligibility criteria on August 3, it sets the date to **August 3, 20201**. And it continues this way, up to and including August 15.

Have the Process Determine the Period

To run the process on a schedule, leave the effective date blank. This way each instance of the process can set the effective date to the system date when it runs. Set **Days Back from Effective Date** to the appropriate numeric value so the process can calculate a start date each time it runs. For example, you want to run the process every 2 weeks just before the biweekly payroll run. To specify an evaluation period that covers the 2-week period since the process last ran, set **Days Back from Effective Date** to **13**. When it runs, the process subtracts 13 days from the effective date to get the start date of the evaluation period. When the process runs on August 15, it sets **Effective Date** to **August 15, 2021**. It then calculates that the evaluation period starts on August **2, 2021**.

The maximum evaluation period is 40 days. You can evaluate eligibility for a longer period by breaking your process up into multiple periods that are shorter than 40 days.

When Eligible Before the Evaluation Period Start Date

When people meet the eligibility criteria before the evaluation period start date, the process sets their assignment start dates to the period start date. For example, the evaluation period is August 2 through 15, 2021, but a person met the eligibility criteria on July 31, 2021. The process sets their assignment start date to August 2, 2021. For the process to set the person's assignment start date to **July 31, 2021**, the evaluation period would need to include July 31.

Related Topics

- Batch Settings for Grade Step Progression Processing
- Create a Progression Grade Ladder
- Effective and Transaction Dates in Grade Step Progression Processing
- Run Grade Step Progression Process
- Synchronize Grade Step Rate Process

On Eligibility and Processing That Includes Future-Dated Assignments or Salaries

Batch error condition settings can prevent grade step progression processing when a future-dated assignment or salary exists. If **Transaction Date** is **On eligibility**, the future-dated assignment or salary can be relative to any dates of the process evaluation period. For example, the process is evaluating progression for dates from August 2 through 15, 2021 and finds a person with an assignment dated August 3. Even though the process effective date is August 15, the process considers the assignment a future-dated assignment. That's because the assignment date is after the evaluation period start date of August 2 and thus has a future date.

Related Topics

- On Eligibility Option for Grade Step Transaction Date
- Batch Settings for Grade Step Progression Processing
- Create a Progression Grade Ladder
- Effective and Transaction Dates in Grade Step Progression Processing
- Overview of Grade Step Progression Processing

Salary Update Details Transaction Date

The **Run Grade Step Progression** process sets the start date of the updated salary. It uses the specified **Transaction Date** option in the Salary Update Details section of the Progression Grade Ladder page. Here's how each option affects the start date of an updated salary.

Option	Start Date the Process Sets for the Updated Assignment
Grade step change date	The same date used for the assignment, which is the **Transaction Date** value selected in the Progression Grade Ladder Details section.
Start of next month	The day 1 of the month after the effective date. For example, if the effective date of the process is **January 15, 2021**, the start of next month date is **February 1, 2021**.
Start of next pay period	The first day of the pay period beginning after the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is **January 15, 2021**, the start of next pay period date is **January 16, 2021**.
Start of current pay period	The first day of the pay period that includes the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is **January 15, 2021**, the start of current pay period date is **January 1, 2021**.
Use formula	The date returned by the specified formula.

Related Topics

- Create a Progression Grade Ladder
- Effective and Transaction Dates in Grade Step Progression Processing
- Overview of Grade Step Progression Processing
- Run Grade Step Progression Process
- Synchronize Grade Step Rate Process

Rate Synchronization Details Transaction Date

The **Synchronize Grade Step Rates** process sets the start date of the updated salary. It uses the specified **Transaction Date** option in the Rate Synchronization Details section of the Progression Grade Ladder page. Here's how each option affects the start date of an updated salary.

Option	Start Date the Process Sets for the Updated Assignment	Possible Exception
Process run date	The effective date set when you submit the **Synchronize Grade Step Rates** process.	None
Grade step rate change date	The start date of the rate value on the progression grade ladder.	Salary start dates
Start of next month	The day 1 of the month after the effective date. For example, if the effective date of the process is **January 15, 2021**, the start of next month date is **February 1, 2021**.	Salary end dates
Start of next pay period	The first day of the pay period beginning after the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is **January 15, 2021**, the start of next pay period date is **January 16, 2021**.	Salary end dates
Start of current pay period	The first day of the pay period that includes the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is **January 15, 2021**, the start of current pay period date is **January 1, 2021**.	Salary start dates
Use formula	The date returned by the specified formula.	Salary start and end dates

Related Topics

- Salary Start Date Exceptions for Rate Synchronization Transaction Dates
- Salary End Date Exceptions for Rate Synchronization Transaction Dates
- Create a Progression Grade Ladder
- Effective and Transaction Dates in Grade Step Progression Processing
- Synchronize Grade Step Rate Process

Salary Start Date Exceptions for Rate Synchronization Transaction Dates

The **Synchronize Grade Step Rates** process sets the salary start date using the transaction date. Sometimes the salary start date calculated from the transaction date is before the date the person moved to their current step or grade. This can happen when the rate synchronization details **Transaction Date** is one of these options:

- Grade step rate change date
- Start of current pay period
- Use formula

When the calculated date is before the date for the current step or grade, the process sets the salary start date to the person's current assignment. The process determines the current assignment using the effective date. Thus the assignment it finds might not be the assignment with the latest start date.

For example, your **Transaction Date** is **Grade step rate change date** and your rate values were updated effective January 1, 2021. On February 2, 2021, a person moved from step 4 to step 5. You run the process with an effective date of **February 2, 2021**, which the process uses to find the person's current assignment. The process determines that the person is on step 5, so it updates the person's salary with the new rate for step 5. In most cases, the process would set the start date of the updated salary according to the transaction date setting. In this example, that date is the effective date of the updated rate values, January 1, 2021. But that start date doesn't make sense for this person, who moved to the new step on February 2, 2021. You wouldn't want to update their rate for step 5 even a day before they moved to the step. So, the process sets the salary start date to the start date of the assignment the process determined is current, **February 2, 2021**.

Related Topics

- Create a Progression Grade Ladder
- Effective and Transaction Dates in Grade Step Progression Processing
- Overview of Grade Step Progression Processing
- Synchronize Grade Step Rate Process
- Run Grade Step Progression Process

Salary End Date Exceptions for Rate Synchronization Transaction Dates

The **Synchronize Grade Step Rates** process sets the salary start date using the transaction date. Sometimes the salary start date calculated from the transaction date is after the date the person moved out of the current step or grade. This can happen when the rate synchronization details Transaction Date is one of these options:

- Start of next month
- Start of next pay period
- Use formula

When the calculated date is after the move date, the process excludes the assignment from processing. The process determines the current assignment using the effective date. Thus the assignment it finds might not be the assignment with the latest start date.

For example, your **Transaction Date** is **Start of next month**. On June 1, 2021, a person moved to step 2. They then moved to step 3 on July 15, 2021. When you run the process with an effective date of **July 1, 2021**, it sets the person's salary start date to **August 1, 2021**. The process also uses the effective date to determine that the person's current assignment is the June 1 assignment. It doesn't make sense to update the August 1 salary with the step 2 rate however, because they aren't on that step on August 1. So the process excludes the June 1 assignment from processing. When you run the process with an effective date on or after July 15, 2021, it updates the rate value for the person's July 15 assignment.

Related Topics

- Create a Progression Grade Ladder
- Effective and Transaction Dates in Grade Step Progression Processing
- Overview of Grade Step Progression Processing
- Run Grade Step Progression Process
- Synchronize Grade Step Rate Process

14 Global Settings for Grade Step Progression Processing

Online Settings for Grade Step Progression Processing

You can let HR actions, such as **Hire** or **Promote**, update the salary, even if the proposed salary is lower than the current salary.

You configure this setting using the **Configure Global Compensation Settings** task in the Setup and Maintenance work area. The task is part of the Compensation Management offering, Base Pay functional area.

Related Topics

- Overview of Grade Step Progression
- Grade Step Progression Processing
- Proposed Progression and Salary Updates
- Salary Amounts for Proposed Progression and Salary Updates

Batch Settings for Grade Step Progression Processing

To limit the start of the date range when **Grade Step Transaction Date** is **On eligibility**, set a numeric value for **Maximum Eligibility Look-Back Days**. This value limits the **Eligibility Evaluation Start Date** and **Days Back from Effective Date** values people can set on the Run Grade Step Progression page.

You set the maximum eligibility look-back days using the **Configure Global Settings** task in the Compensation work area, Workforce Compensation section. The default value is **40**, meaning that the start date can be 40 days before the effective date. You can enter any number between **0** and **40**.

Related Topics

- Effective and Transaction Dates in Grade Step Progression Processing

Batch Error Conditions for Assignment Date in Grade Step Progression Processing

You can specify if the **Run Grade Step Progression** process can make multiple step updates on the same date as an existing assignment grade step record. Use the **Configure Global Compensation Settings** task in the Setup and Maintenance work area. The task is part of the Compensation Management offering, Base Pay functional area.

You can review salary information on the Review Proposed Progressions and Salary Updates page. There you see the current and proposed values. And, you see the same **Effective Start Date** value for both the current and proposed step.

If you do enable multiple updates, the processes update the existing row with the new information and a new sequence. You don't see the historical step attribute when you view older records for assignment rows with the same date. History is maintained for all the attributes that the assignment record stores. But, the assignment grade step record stores only the most recent step attribute. So, history isn't maintained for the assignment grade step attribute because older values were overwritten.

Related Topics

- Overview of Grade Step Progression
- Grade Step Progression Processing
- Proposed Progression and Salary Updates
- Salary Amounts for Proposed Progression and Salary Updates

Batch Error Conditions for Salary Date in Grade Step Progression Processing

You can specify if these processes should generate errors when they find an existing salary record with the same or future date. By default, the processes generate warnings.

- Run Grade Step Progression
- Synchronize Grade Step Rates

These settings don't affect any change to the grade ladder, grade, or step during an HR action, such as **Hire**, **Promote**, or **Transfer**. They only affect the behavior of the batch processes. They also don't affect date handling in HR actions.

Use the **Configure Global Compensation Settings** task in the Setup and Maintenance work area. The task is part of the Compensation Management offering, Base Pay functional area.

Updates to Existing Record with the Same Date

If you enable updates to a salary record that exists on the same date, you’re correcting the existing salary record.

- The new salary amount may be greater or less than the existing salary amount.
- The new salary amount may not be less than the salary amount that exists on a prior date. If this situation occurs, you get an error message.
- When viewing the details on the Review Proposed Progressions and Salary Updates page, you see the current salary details. These details reflect the values of the existing salary record for the same date, that is, the record being corrected.

Updates When Future-Dated Records Exist

If you enable updates to a salary record when future-dated records exist, you're inserting a new record in the middle of the historical sequence.

- The salary amount for the inserted salary record may be greater or less than any salary amounts in future-dated records.
- The salary amount for the inserted salary record may not be less than the salary amount on the record that exists on the previous date. If this situation occurs, you get an error message.
- When viewing the details on the Review Proposed Progressions and Salary Updates page, you see the current salary details. These details reflect the prior salary record, that is, the one with an effective date before the effective date of the record being inserted.

Related Topics

- Overview of Grade Step Progression
- Grade Step Progression Processing
- Proposed Progression and Salary Updates
- Salary Amounts for Proposed Progression and Salary Updates

15 Grade Step Progression Processing

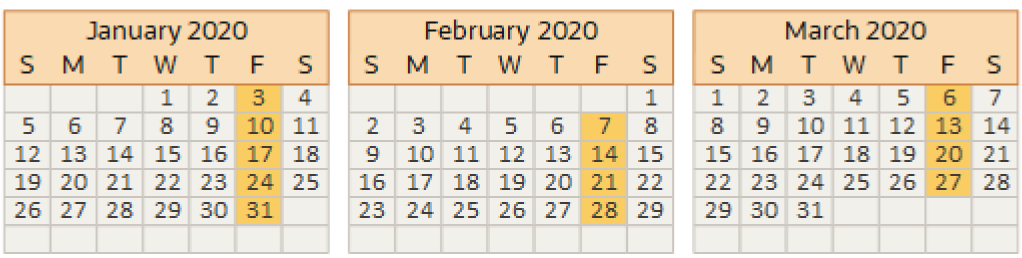
Overview of Grade Step Progression Processing

You can change people's assignment and salary records according to rates and rules associated with a progression grade ladder. You do this using two batch processes:

- Run Grade Step Progression
- Synchronize Grade Step Rates

Run Grade Step Progression Process

To identify the assignments that are eligible to progress to a new grade or step, you run the **Run Grade Step Progression** process. Typically, you schedule this process to run on a regular basis, according to your policies. For example, you run it every Friday.



The process evaluates each assignment associated with the ladder. It uses the eligibility criteria in the progression rules for the higher steps and grades. The assignments that the process considers need to have the **Include in Grade Step Progression** option selected. The process adds any assignments with the option unselected to the Error tab. It includes a message confirming that it excluded the assignment, per the option setting. If the process determines that the assignment meets the eligibility criteria, then the assignment is eligible to progress to that grade or step. It's also eligible for the associated salary changes.

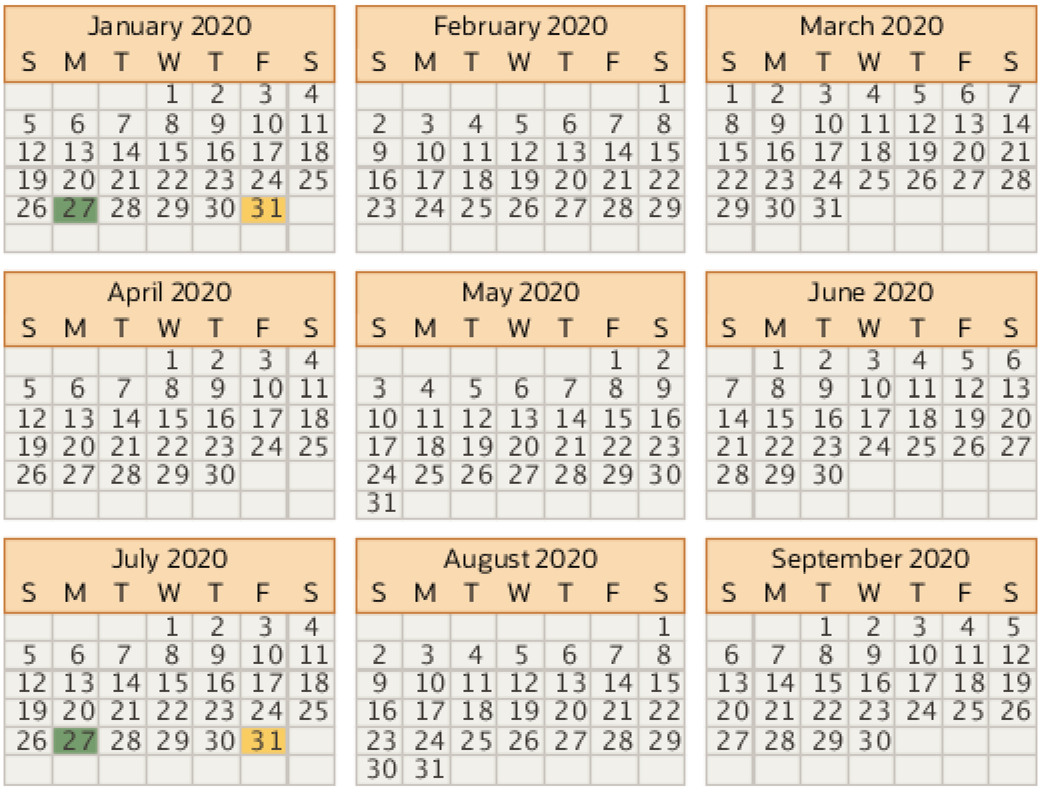
You can set a specific effective date or leave the effective date blank. If you don't set a date, the process uses the system date at runtime.

Related Topics

- Propose Progression and Salary Update According to Eligibility
- Update Salary According to New Progression Grade Ladder Rates
- Overview of Proposed Progression and Salary Updates
- Create a Progression Grade Ladder
- Online Settings for Grade Step Progression Processing

Synchronize Grade Step Rate Process

To change people's salary records after the underlying rates for the grades or steps change, you run the **Synchronize Grade Step Rates** process. Typically, you run this process manually, once or twice a year. For example, your organization approves new contracts the last Monday in January and July, and you sync the grade step rates that Friday.



The process applies the new rates to the existing salary records for everyone whose assignment is associated with the progression grade ladder. The assignments that the process considers need to have the **Include in Grade Step Progression** option selected. The process adds any assignments with the option unselected to the Error tab. It includes a message confirming that it excluded the assignment, per the option setting.

Related Topics

- Propose Progression and Salary Update According to Eligibility
- Update Salary According to New Progression Grade Ladder Rates
- Overview of Proposed Progression and Salary Updates
- Create a Progression Grade Ladder
- Online Settings for Grade Step Progression Processing

How You Include Multiple Progression Grade Ladders in a Process

To include multiple progression grade ladders in a **Run Grade Step Progression** or **Synchronize Grade Step Rates** process, set **Batch Type** to **Grade ladder** group. Then select the specific group to use. For example, you want to run grade step progression or sync rates for all ladders in the North region. So, you select your **North Region** grade ladder group.

Related Topics

- Overview of Proposed Progression and Salary Updates

Assignment and Salary Actions in Grade Step Progression Processing

When you run the **Run Grade Step Progression** and **Synchronize Grade Step Rates** processes, you can specify the actions to use for the updated assignment and salary. You can either use automated grade step progression or leave the action blank. If you leave it blank, the process uses the assignment action from the progression grade ladder for both the assignment and salary actions.

Related Topics

- Actions for Manual Progression and Synchronization Processes
- Overview of Proposed Progression and Salary Updates
- Create a Progression Grade Ladder
- Online Settings for Grade Step Progression Processing

Frequency in Grade Step Progression Processing Results

The process automatically converts the salary amount from the progression grade ladder frequency to the salary basis frequency, as appropriate. For example, the proposed salary from the grade ladder is 3000 USD per month and the person's salary basis has an annual frequency. The process converts the proposed salary to 36,000 USD annually.

Related Topics

- Overview of Proposed Progression and Salary Updates
- Create a Progression Grade Ladder
- Online Settings for Grade Step Progression Processing

Effective and Transaction Dates in Grade Step Progression Processing

The **Run Grade Step Progression** and **Synchronize Grade Step Rates** processes use both effective dates and transaction dates.

Effective Date

The processes use the effective date that you set to select the person's current grade and step, their current salary, and the appropriate grade ladder rate. For example, you run a process with an effective date of January 1, 2021.

- The process uses the assignment with a date that's before or on January 1, 2021 to find the person's current grade and step. The grade comes from the assignment and the step comes from the child assignment grade step.
- The process uses the salary with a date that's before or on January 1, 2021 to find the person's current salary.
- The process uses the progression grade ladder with an effective date before or on January 1, 2021 to find the rate to use for the proposed salary.

Transaction Date

The processes use the grade step, salary, and rate synchronization transaction dates in your progression grade ladder definition to set start dates.

Related Topics

- Progression Grade Ladder Details Transaction Date
- Salary Update Details Transaction Date
- Rate Synchronization Details Transaction Date
- Salary Start Date Exceptions for Rate Synchronization Transaction Dates
- Salary End Date Exceptions for Rate Synchronization Transaction Dates

16 Examples of Grade Step Progression Processing

Propose Progression and Salary Update According to Eligibility

You can change people's assignment and salary records according to rules linked to a progression grade ladder. Here's how various progression grade ladder configurations affect **Run Grade Step Progression** processing results. These processing conditions apply for all increment options:

- If a single grade or step has more than one progression rule, the person must meet the criteria in all progression rules.
- If a grade or step doesn't have an associated eligibility profile, then all assignments are eligible to progress to that grade or step.
- If an assignment meets the criteria for more than one grade or step, the process proposes to move the person to the lowest eligible steps. You see a warning message when you review the processing results.

Progression Increment Is Grade and Step

Scenario: A person is on the **Midwest Hourly** progression grade ladder at **Grade A**, **Step 1**. The ladder has five grades: (**A**, **B**, **C**, **D**, **E**), and each grade has four steps. The progression increment is **Grade and step**.

Results: First, the process checks the progression rules associated with **Grade A**, **Step 2** to determine if the person is eligible to move to **Step 2**. Then, it checks the steps above **Step 2**, including steps in higher grades.

Progression Increment Is All Steps in Grade, Stop at Ceiling

Scenario: A person is on the **Midwest Hourly** progression grade ladder at **Grade A**, **Step 1**. The ladder has five grades: (**A**, **B**, **C**, **D**, **E**), and each grade has four steps. The ceiling step for **Grade A** is **Step 3**. The progression increment is **All steps in grade, stop at ceiling**.

Results: The process checks the progression rules associated with **Grade A**, **Step 2** to determine if the person is eligible to move up to **Step 2**. Then, it checks **Step 3**. It won't check **Step 4**, because **Step 4** is above the ceiling step for **Grade A**. And, it won't check any of the grades above **Grade A**.

Progression Increment Is Next Step in Grade, Stop If Ceiling

Scenario: A person is on the **Midwest Hourly** progression grade ladder at **Grade A**, **Step 1**. The ladder has five grades: (**A**, **B**, **C**, **D**, **E**), and each grade has four steps. The ceiling step for **Grade A** is **Step 3**. The progression increment is **Next step in grade, stop if ceiling**.

Results: The process checks the progression rules associated with **Grade A**, **Step 2** to determine if the person is eligible to move up to **Step 2**. It won't check any steps above **Step 2** because this progression increment only evaluates the one step above the current step.

Progression Increment Is Next Step in Grade Ladder

Scenario: A person is on the **Midwest Hourly** progression grade ladder at **Grade A**, **Step 4**. The ladder has five grades: (**A**, **B**, **C**, **D**, **E**), and each grade has four steps. The ceiling step for **Grade A** is **Step 3**. The progression increment is **Next step in grade ladder**.

Results: The process checks the progression rules associated with **Grade B**, **Step 1** to determine if the person is eligible to move to **Grade B**, **Step 1**. It won't check any grades or steps above **Grade B**, **Step 1**.

Related Topics

- Progression Increment Options in Grade Step Progression
- Overview of Grade Step Progression Processing

Update Salary According to New Progression Grade Ladder Rates

You can change people's assignment and salary records according to rates linked to a progression grade ladder. Here's how configuration changes to the progression grade ladder affect **Synchronize Grade Step Rates** processing results.

Scenario

Scenario: A person is on the **Midwest Hourly** progression grade ladder at **Grade A**, **Step 4** as of their hire date. The salary for this step is **30 USD** per hour. On January 1, 2020, the rates for the **Midwest Hourly** ladder increased and now **Step 4** has a rate of **35 USD** per hour.

Results: The process inserts a new salary record for the person with the rate of **35 USD** per hour. The **Transaction Date** parameter on the Progression Grade Ladder page, Rate Synchronization section determines the effective date of the salary update.

Related Topics

- Overview of Grade Step Progression Processing
- Overview of Parameters that Affect Salary Amounts for Proposed Progression and Salary Updates

17 Proposed Grade Step Progression and Salary Updates

Overview of Proposed Progression and Salary Updates

You can access the results of a **Run Grade Step Progression** or **Synchronize Grade Step Rates** process from the Review Proposed Progressions and Salary Updates page.

When you search on a grade ladder group, you see all grade ladders belonging to that group. It doesn't matter if the process ran by grade ladder group or by individual grade ladder. This gives you the flexibility to run or rerun the process for a single grade ladder. You can still see the results for that grade ladder when viewing results for the entire grade ladder group.

To see who has proposed progressions and the corresponding statuses, click the appropriate process name. The people you see depends on your data security permissions. You can also view any errors that occurred.

To align with times on the process scheduling and monitoring pages, the submission time is in the UTC time zone.

Statuses for Grade Step Processes

Here are descriptions of the statuses you can see on the Results page, Updates tab after running the **Run Grade Step Progression** and **Synchronize Grade Step Rates** processes:

Status	Description
Accepted	The process applied the proposed progressions and salary updates to the assignment and salary records. You can't change this status.
Not Processed	The process evaluated the progression and determined that the person is eligible to move to the new grade or step. A person still has to accept or reject the proposal.
Failed	The service that was writing the update to the assignment or salary record had a problem. To try to make the update manually, you can click **Accept**.
Suspended	Older batch process results that contain rows that were in **Not Processed** status when a subsequent process ran have this processing status. You can no longer accept or reject these proposals in the older run.
Rejected	Someone stopped the process from applying the proposed updates to the person's records. For example, you might reject a proposed progression and manually adjust it because the person is eligible for multiple steps in the grade.

Related Topics

- Overview of Proposed Progression and Salary Updates

Actions for Manual Progression and Synchronization Processes

You have actions available only if the confirmation type for the progression grade ladder or rate synchronization is Manual. You can accept the updates for people individually or as a group. Accepting a proposed progression and salary update immediately makes these changes for the selected people:

- Adds a new grade or step to the person's assignment
- Adds a new salary amount to the person's salary record

You can reject proposed progressions and salary updates for people individually or as a group. You can also reject proposed progressions and salary updates for selected people in a group, and then accept updates for the remaining people. If you reject a proposal and then change your mind, you can undo the rejection and set the proposal status back to **Not Processed**.

If some time passes before you review the proposed updates, the underlying data might have changed. To catch any new problems, some of the validations run again when you manually accept the progressions and salary updates. If you change the person's assignment or salary record after the process ran, you might see an error message in situations like these:

- You add a future-dated salary record, and your configuration setting doesn't allow updates when future-dated salary records exist.
- You add a salary record for the same date as the proposed salary. But your configuration doesn't allow updates when a salary record exists on the same date.
- You add a future-dated assignment.
- You add a grade step record for the same date as the proposed progression. But your configuration doesn't allow updates when a grade step record exists on the same date.
- You change the person's salary basis.

For example, you ran the process with **Confirmation Type** set to **Manual** and there were no errors for this person. A proposed progression and salary update exists for June 25. After the process completed, you added a salary record dated July 1. You come to the Review Proposed Progressions and Salary Updates task and use the **Accept** action to update the person's assignment and salary record. Now, because the underlying data changed, you see the error showing that the proposal isn't allowed because there's a future-dated salary record.

Related Topics

- Overview of Proposed Progression and Salary Updates

How You Can Handle Progression Processing Errors

You can review any errors that occurred during progression processing on the Results page, Errors tab. You fix the proposed progressions and salary changes with errors outside of the grade step progression process. Here are some possible processing errors:

- The progression grade ladder currency is different from salary basis currency.
- The proposed salary isn't greater than the current salary.
- The salary basis isn't defined as determined by user.
- A future-dated assignment exists.
- A current or future-dated salary record exists.
- A step update exists on the same date.

Reference

For more information about troubleshooting grade step progression issues, see Troubleshooting Grade Step Progression (document ID 2753020.1) on My Oracle Support at https://support.oracle.com.

Related Topics

- Overview of Proposed Progression and Salary Updates
- Overview of Parameters that Affect Salary Amounts for Proposed Progression and Salary Updates

18 Adjustments to Salary Amounts in Proposed Progression and Salary Updates

Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates

The current and proposed salary amounts that you see when reviewing results of grades step progression processing depend on either or both of these parameters:

- The rounding rules of the person's salary basis
- The salary adjustment type of the person's progression grade ladder

You can review current and proposed salary amounts using the **Review Proposed Progressions and Salary Updates** task in the Compensation work area.

Related Topics

- Overview of Grade Step Progression Processing

How Rounding Rules Affect Salary Amounts for Proposed Progression and Salary Updates

A salary basis may have rounding rules for salary amount and annualized amounts. If it does, progression processing rounds the calculated salary amount according to that rule when it converts the salary from one frequency to another. For example, the process rounds the amount when it updates a salary record with a monthly salary basis using hourly rates from a grade ladder.

Progression processing also rounds the annual salary and annualized full-time salary amounts. It calculates and stores the annual amounts during the batch run. You see these annual amounts in the process results only for reference. The process doesn't include the annual amounts on the salary record. The annual amounts that you see on the salary record are calculated dynamically, so you might occasionally see differences in annual values. For example, the annual amounts are different on the salary page if the rounding rules change after you run the grade step progression process.

Related Topics

- Overview of Grade Step Progression Processing
- Overview of Parameters that Affect Salary Amounts for Proposed Progression and Salary Updates

How the Salary Adjustment Type Affects Salary Amounts for Proposed Progression and Salary Updates

When you view the grade step progression processing results for a specific person, you can see the current and proposed full-time salary amounts.

- The full-time salary amounts help you determine whether to approve the proposed progression or salary update. You can compare the current full-time salary with grade ladder rates. The full-time salary may correspond to the grade ladder rate for the current step. But, it may be different if the salary record was overridden. The proposed full-time salary is the grade ladder rate for the proposed step, before being prorated for FTE value.
- The salary amounts are the amounts stored in the salary record. The current salary is the actual stored amount. The proposed salary becomes the stored amount. The proposed salary includes proration by FTE and rounding, if applicable.

FTE Proration and Salary Adjustment Type

The grade step progression processes prorate salary amounts by FTE according to the **Salary Adjustment Type** setting of the progression grade ladder.

- Here's how the processes adjust the salary when the salary amount is determined by users:
    - If you leave **Salary Adjustment Type** blank, the processes don't adjust the proposed salary amounts for FTE.
    - If you set **Salary Adjustment Type** to **FTE less than 1 only**, the processes adjust the salary if the FTE is less than 1. They don't adjust salaries where the FTE is greater than 1.
    - If you set **Salary Adjustment Type** to **FTE not equal to 1**, the processes adjust the salary if the FTE is less than or greater than 1. For example, if the FTE is **.75** or **1.25**, the processes adjust the salary.
    - If FTE is 1, the processes ignore the **Salary Adjustment Type** setting and don't adjust salaries.
- When the salary amount is determined by simple components, the processes always adjust the salary amount by the FTE, even you leave the field blank.

Related Topics

- Overview of Grade Step Progression Processing
- Overview of Parameters that Affect Salary Amounts for Proposed Progression and Salary Updates

19 Individual Compensation Plans Overview

Overview of Individual Compensation

You can let managers and specialists award compensation outside of the regular compensation cycle. For example, a line manager can give someone a spot bonus or grant stock shares. And a compensation manager can give people education reimbursements. You can also let people make and change their own contributions to charitable or savings plans. These off-cycle allocations and contributions require appropriate payroll elements and individual compensation plans.

- The payroll element communicates the payment or distribution details to payroll for processing. For example, a company car plan has options with different compensation amounts for various mileage ranges. A spots bonus plan has options with different fixed monetary amounts.
- The plan includes at least one option that links the payroll element to the plan. It also determines when payments start and end, who's eligible for the plan, and when people can access the plan. For example, a car allowance plan has multiple options for monthly payments starting January 1 and ending December 31 according to mileage ranges. People in field sales and service jobs are eligible for the plan, and managers can award compensation when they hire, transfer, and promote people.

You can also let people view nonmonetary awards by adding the relevant plans to compensation history. To let them view their payment and contribution history, add the payroll elements linked to the plans that have recurring payments or contributions.

Related Topics

- Individual Compensation Plans

Individual Compensation Plans

You can enable managers to award compensation to individuals outside of their regular compensation cycle. For example, a line manager can give someone a spot bonus or grant stock shares. A compensation manager can give people education reimbursements. You can also enable people to manage their own contributions to charitable or savings plans. You do this by creating individual compensation plans using the **Individual Compensation Plans** task in the Compensation work area.

Options

Each plan must have at least one option. You can set up a nonmonetary option, such as grant stock shares, or a monetary option. When you create the option, you need to select the payroll element that communicates the allocation or contribution to payroll for processing. The input values configured for the element are what people see when they allocate the compensation or contribution.

Make sure that the element you select isn't also used in salary bases. Using the same element across compensation objects can lead to payroll conflicts. It can also lead to unexpected deletions of salary or individual compensation.

You can optionally select a budget pool to let managers track off-cycle and on-cycle awards.

Payment Dates

You specify when plan payments start and end using standard date rules. For example, the person proposing the award can set the payment date. You only need to set end dates for recurring payments, such as car allowances.

If you select the **Start or submission date** option, the award or contribution uses the start date when people can set it during actions. Otherwise, the award or contribution uses the date when the action was submitted.

Eligibility

You determine who can participate in the compensation plans or options with eligibility profiles. You can attach eligibility profiles to the plan, an option, or both. For example, to the company car plan, you attach an eligibility profile that includes only the Sales and Field Service departments. To the options, you attach additional profiles that restrict payment amounts by mileage ranges.

Compensation eligibility evaluations also use criteria defined at the element eligibility level to determine if someone is eligible for a compensation plan. The best practice for controlling eligibility is to either use eligibility profiles or element eligibility, but not both.

If you add multiple profiles, you need to mark at least one profile as required.

Plan Access Restrictions

You control who can start, update, or discontinue individual compensation awards and for what circumstances when you restrict plan access. For example, you set up a plan so that only people using the **Manager Personal Contributions** action can start, update, or discontinue contributions.

Plan Info

To help managers awarding the plan or individuals contributing to the plan, you can optionally provide background information or instructions. You can also include links to relevant documents and websites. You can also specify whether people viewing the plan see this information when they select the plan, or after they click **Show plan info**.

Related Topics

- Plan Access Restrictions
- Create Compensation Payroll Elements
- Example Spot Bonus and Stock Grant Plan Configuration
- Example Car Allowance Plan Configuration
- Example Charity or Savings Contribution Plan Configuration

Journey Checklist Tasks and Individual Compensation Plan Allocations

You can send people checklist tasks as part of their journeys when they get new individual compensation allocations. For example, an individual subscribes to a voluntary deduction. The corresponding journey includes checklist tasks that require an HR specialist to manually generate a membership ID, enable portal access, and issue a welcome kit.

Assign Checklists

You can assign checklist tasks only when people add new individual compensation allocations using actions, such as these:

- Individual Compensation
- Manage Personal Contribution
- Administer Individual Compensation

You can also assign tasks with Recruiting and Global Human Resource actions that add individual compensation allocations. The checklist tasks are assigned after the new individual compensation allocation passes final approval and the element entries are created. The checklist listens to the new element entries for the individual compensation allocation using events. For the events to work, make sure that the profile option **HRC_DISABLE_HCM_EVENTS_PROCESSING** is **N**.

Create the Checklist Template

You create a checklist template following the standard procedure and using these individual compensation settings:

- On the General tab, select a category.
- On the Tasks tab, configure the tasks.
- On the Actions and Events tab, configure the event that causes the journey to assign the checklist. For new individual compensation allocations, the creation of the entry for the specified element causes the checklist to assign the task.

    a. Add an event. Then in the **Name** field, select **Individual Compensation**.
    b. Edit the condition and create a group. The attribute defaults to **Element Type** and the condition defaults to the **Equals** operator and **Constant** operand type.
    c. In the **Operand Value** field, click **search**. Use the Search and Select dialog box to select the appropriate payroll element for the individual compensation option.

    You can use only the **OR** group connector when you define group conditions for individual compensation. The conditions don't support the **AND** connector.

Control When the Checklist Triggers

To control when the checklist triggers, you use the allocation criteria.

- The default **Checklist manually allocated or record created or approved** option triggers when the individual compensation allocation is approved and element entries are created. The trigger ignores the payment start date.
- The **When the action record becomes effective** option triggers the checklist on the payment start date.

Related Topics

- Checklist Templates
- Considerations for Configuring Checklist Actions
- How You Configure Events in Checklists
- Checklist and Task Display Properties

How You Let People Submit Personal Contributions When Earlier Contributions Are Pending Approval

To let people submit personal contributions when earlier contributions are pending approval, you need to enable the **CMP_DISABLE_PENDING_APPROVALS_CHECK_IN_MANAGE_CONTRIBUTION** profile option at the **Site** level.

You also need to configure the access details of the relevant individual compensation plans. For the **Manage Personal Contribution** task, never allow update allocations and never allow the discontinuation of allocations. This access detail configuration ensures that individuals can't change or delete existing contributions, preventing conflicts for contributions that are pending approval.

With this option enabled, approvers can't edit submitted contributions as part of their approval. Also, they can't see the submitted values if they edit the submitted contribution. Line managers, compensation managers and administrators, and HR specialists can still make updates or deletions using the **Manage Individual Compensation** or **Administer Individual Compensation** tasks. This visibility assumes you configured the plan access to include the corresponding actions for these tasks.

Related Topics

- Plan Access Restrictions
- Individual Compensation Plans

How You Let Managers Track Off-Cycle and On-Cycle Compensation Against a Budget

Here's how you can enable managers to track off-cycle and on-cycle awards when they review their budget pool.

1. Create the workforce compensation plan using the **Workforce Compensation Plans** task in the Compensation work area.
    a. Configure the plan details.
    b. Configure the budget pool.
    c. Create at least one worksheet compensation component and associate the budget pool with it.
    d. Run the **Start Compensation Cycle** process.
2. After you start the compensation cycle, associate the budget pool with an individual compensation plan option. Use the **Individual Compensation Plans** task in the Compensation work area. Select the budget pool when you add or edit the relevant plan option.

Individual Compensation Plan FAQ

What's the difference between plan access restriction and access security?

Security determines which roles grant access to actions, such as **Individual Compensation**, **Manage Personal Contribution**, and **Administer Individual Compensation**.

Plan access restriction determines which actions, such as **Personal Contribution** or **Individual Compensation**, show the plan. It also lets you control if people can add, edit, or delete contributions or allocations.

20 Payment Dates in Individual Compensation Plans

Sync Individual Compensation Plan Dates with the Projected Hire Date in an Offer

You can sync the payment start and end dates of individual compensation plans included in an offer, with the projected hire date. Do this by setting the payment start and end dates of the individual compensation plans to **Projected Hire, Start, or Submission Date**. Then whenever you change the projected hire date in an offer and go to the individual compensation section, the plan payment dates adjust automatically.

For example, you have an offer with a projected hire date of January 1, 2022. The offer includes an individual compensation plan with payments that start the same day. Later you revise the projected hire date to February 1, 2022. When you get to the individual compensation section, the existing payment start date automatically adjusts to February 1, 2022, to align with the new projected hire date.

Delay Payment

You can optionally delay the payment date by a specific number of days, months, years, or combination. The offer calculates the payment start and end dates using the projected hire date and the specified delay. For example, your offer includes paying a signon bonus 1 month after the projected hire date. Since your current projected hire date is **February 1, 2022**, the payment start date of the bonus allocation is **March 1, 2022**.

Override the Payment Date

You can let recruiters override the calculated payment start date, end date, or both when they include the plan in their offers. When they do override the payment dates, the projected hire date and the payment dates can't automatically sync anymore. The recruiters have to delete the individual compensation plan and add it again every time they change the projected hire date. They can't correct the existing payment dates.

Offer flows indicated overridden plan dates with **(Set manually)**.

Examples of How Payment Start Dates in an Offer Sync with the Projected Hire Date

You have an offer with three individual compensation plans that have slightly different configurations for the payment start date of **Projected Hire, Start, or Submission Date**. Here's how the configurations affect the payment start dates for the three plans when the projected hire date for the offer changes.

Payment Start Date Configuration	Original Projected Hire Date	Original Payment Start Date	Revised Projected Hire Date	Adjusted Payment Start Date
Plan 1, the start date is the projected hire date	Jan 1, 2022	Jan 1, 2022	Mar 1, 2022	Mar 1, 2022
Plan 2, the start date is 1 month after the projected hire date	Jan 1, 2022	Feb 1, 2022	Mar 1, 2022	Apr 1, 2022
Plan 3, the start date is the projected hire date, but recruiters can override the date	Jan 1, 2022	Initially set to Jan 1, 2022 Recruiter overrides to Apr 1, 2022	Mar 1, 2022	Apr 1, 2022 Overridden dates remain unadjusted

The payment start date for Plan 3 doesn't change because the recruiter overrode the original date. The recruiter has to delete this individual compensation plan and add it again with the revised payment start date.

After the external candidate accepts the offer with the projected hire date of **March 1, 2021**, the individual compensation plans show up on the pending worker page. The plan payment dates for the pending worker are the same dates shown in the Adjusted Payment Start Date column.

Sync Individual Compensation Plan Dates with the Start Date in a Pending Worker Action

You can sync the payment start and end dates of individual compensation plans included in a pending worker action, with the start date. Do this by setting the payment start and end dates of the individual compensation plans to **Projected Hire, Start, or Submission Date**. Then the plan payment dates adjust automatically whenever people change the start date in the **Edit Pending Worker** action and go to the individual compensation section.

For example, you have a pending worker with a start date of January 1, 2022. The details include an individual compensation plan with payments that start the same day. Later you revise the start date to February 1, 2022. When you get to the individual compensation section, the existing payment start date automatically adjusts to February 1, 2022, to align with the new start date.

The plan payment dates won't adjust if people change the start date and don't visit the individual compensation section. They won't automatically adjust in these situations either:

- When people change the start date in other flows, such as **Employment** details, **Change Employment Start Dates**, and **Change Work Relationship Start Date**
- On any other pages where people can change the start date of the pending worker.
- When people use HCM Data Loader or REST services

People have to manually delete and readd the individual compensation plans in all such scenarios.

When someone end dates the individual compensation row in the pending worker flow, the flow carries the end date forward to the conversion stage.

Delay Payment

You can optionally delay the payment dates by a specific number of days, months, years, or combination. The pending worker flow calculates the payment start and end dates using the start date and the specified delay. For example, your details include paying a signon bonus 1 month after the start date. Since your current start date is February 1, 2022, the payment start date of the bonus allocation is March 1, 2022.

Override the Payment Date

You can let people override the calculated payment start date, end date, or both when they include the plan in the individual compensation section. When they do override the payment dates, the start date and the payment dates can't automatically sync anymore. They have to delete the individual compensation plan and add it again every time they change the start date. They can't correct the existing payment dates.

Pending worker flows identify overridden plan dates with **(Set manually)**.

Examples of How Payment Start Dates in a Pending Worker Action Sync with the Start Date

You have a pending worker action with three individual compensation plans that have slightly different configurations for the payment start date of **Projected Hire, Start, or Submission Date**. Here's how the configurations affect the payment start dates for the three plans when the start date for the pending worker changes.

Payment Start Date Configuration	Original Projected Hire Date	Original Payment Start Date	Revised Projected Hire Date	Adjusted Payment Start Date
Plan 1, the start date is the pending worker start date	Jan 1, 2022	Jan 1, 2022	Mar 1, 2022	Mar 1, 2022
Plan 2, the start date is 1 month after the pending worker start date	Jan 1, 2022	Feb 1, 2022	Mar 1, 2022	Apr 1, 2022
Plan 3, the start date is the pending worker start date, but people can override the date	Jan 1, 2022	Initially set to Feb 1, 2022 Overridden to Apr 1, 2022	Mar 1, 2022	Apr 1, 2022 Overridden dates remain unadjusted

The payment start date for Plan 3 doesn't change because you overrode the original date. When the dates need to be revised, you have to delete this individual compensation plan and add it again with the revised payment start date.

Payment End Date Considerations for Individual Compensation Plans

If you configure the individual compensation plan with a nonrecurring payroll element, the payment end date depends on whether the person's payroll relationship links to a payroll. The payment end date you configure for the plan is ignored.

- When payroll isn't available in the payroll relationship, the payment end date is the same as the payment start date.
- When payroll is available in the payroll relationship, the payment end date is the period end date for the payroll process.

The **Offer** and **Pending Worker** flow end dates carry forward to the next stage when the plan payment end date is **Projected Hire, Start, or Submission Date**.

How the Projected Hire, Start, or Submission Date Works in HR Actions

Here's how the **Projected Hire, Start, or Submission Date** payment date works with HR actions started from the Manage Job Offers page or elsewhere.

Started from Manage Job Offers

You can sync the initial payment start and end dates of individual compensation plans included with the projected hire date of the internal offer. Do this by setting the payment start and end dates of the individual compensation plans to **Projected Hire, Start, or Submission Date**. When the proposer starts the HR action, the when date defaults to the projected hire date of the offer. If the proposer changes the when date and goes to the individual compensation section, the plan payment dates adjust automatically. If the proposer changes the when date later on, they need to delete and add the individual compensation plans again, with the correct payment dates.

For example, you have an internal candidate offer with the projected hire date of **January 1, 2022**. You then start processing the global transfer with a when date of **January 1, 2022**. The transfer includes an individual compensation plan with payments that start the same day. When you get to the individual compensation section, you see that the plan has a payment start date of **January 1, 2022**. Before you submit the transfer, you revise the when date to **February 1, 2022**. When you get to the individual compensation section this time, the existing payment start date remains **January 1, 2022**. You need to delete the plan and add it again with the correct payment dates.

Started from a Page Other Than Manage Job Offers

The **Projected Hire, Start, or Submission Date** option works the same as the **Start or Submission Date** option. When the proposer sets the when date and goes to the individual compensation section, the section sets the payment dates to the when date. After that, if the proposer changes the when date, they have to delete the plan and add it again with the correct payment dates.

21 Access and Action Options, and Option Visibility in Individual Compensation Plans

Plan Access Restrictions

You control the situations when a manager can create, update, or discontinue individual compensation awards using plan restrictions. These same restrictions let you control similar actions for people contributing to savings and donation plans. You configure these restrictions when you create the individual compensation plan using the **Individual Compensation Plans** task in the Compensation work area.

Whether to Restrict Access

The first decision you make on the Plan Access tab is whether to restrict access to the plan.

- If you select **No**, the plan becomes available to everyone on all pages where people hire individuals, or manage individual compensation or personal contributions. It's very rare that you would select this option. For example, if you don't restrict access to a bonus plan, then people could manage the bonus plan for themselves. That's because the plan would appear in the Manage Personal Contributions action.
- If you select **Yes**, you need to add at least one action where the plan should be available. Make sure that you select all related actions. For example, you set up the plan so that it's visible in the Pending Worker action. You also want to make it visible in the Hire action. Otherwise, when someone converts to an employee, their manager can't see the allocation. And, when the manager submits their changes, the employee's allocation gets removed. You can optionally configure the corresponding access details about when people can start, update, or discontinue allocations or contributions.

All Action

The default action **All** is similar to setting **Restrict Plan Access** to **No**, except that you can configure access details. This action opens plan access to all actions available in the list, including the **Manage Contributions** action. Basically, anyone who meets the eligibility criteria for the plan can see the plan. If you added this action to a bonus plan, for example, anyone who's eligible for the plan could award themselves a bonus.

If you want to add other access actions, you need to change the **All** action to something else, like **Hire**. Then, the **Add** icon is available and you can add any other access actions that are appropriate for the plan.

HR Actions

To make the plan available to people as part of an HR action, add one or more HR actions. For example, add the **Transfer** action to a moving allowance plan to make the plan available when someone's transferred using that action.

Manage Individual Compensation Action

To make the plan available to people when they want to award off-cycle compensation to someone, add the **Manage Individual Compensation** action. You can add only this action or also add HR actions. For example:

- You want managers to use the **Bonus** plan to reward performance. So, you restrict plan access to the **Manage Individual Compensation** actions.

- You want managers to use the **Bonus** plan to award hiring bonuses or to reward performance. So, you restrict plan access to the **Hire** and **Manage Individual Compensation** actions.

Administer Individual Compensation Action

To make the plan available to only HR specialists, compensation specialists, and compensation managers, add the **Administer Individual Compensation** action. These people can see plans with this plan access action using the **Administer Individual Compensation** task.

Manage Contributions Action

To make the plan available for people to contribute to, such as for retirement savings or charities, add the **Manage Contributions** action. Don't add any other actions for contribution plans.

Copy Individual Compensation Allocations During Local and Global Transfer

You can ensure that local and global transfers automatically copy individual compensation allocations and personal contributions to the new assignment. Do this when you configure plan access for individual compensation plans. Either set **Restrict Plan Access** to **No** or set it to **Yes** and add the **Global Transfer** action.

> **Tip:** When the plan element uses the **Last Standard Process Date** or **Last Standard Earning Date**, the plan isn't end dated for the source assignment.

When Allocations and Contributions Aren't Copied

The automatic copy doesn't happen for these situations:

- If the legal employers for the source and destination assignments have different legislative data groups.
- If the local and global transfer action doesn't include the Individual Compensation section, or the person proposing the transfer don't visit the section.
- If **Restrict Plan Access** is **Yes** and the **Global Transfer** action isn't added.

Individual Compensation Plan and Option Visibility

Your plan configuration determines whether people can see the plan or option when they use the **Administer Individual Compensation**, **Individual Compensation**, and **Manage Personal Contribution** tasks. The person getting the compensation allocation or making the personal contribution has to meet these conditions:

- Be eligible for the element you associated with the option.
- Meet the criteria of the eligibility profile you associated with the plan, option, or both.

Also, the plan status has to be **Active** and plan access should have the appropriate actions added. For example, to be visible for the **Manage Personal Contributions** task, plan access has to have the **Manage Contribution** action.

Related Topics

- Plan Access Restrictions
- Individual Compensation Plans

22 Example Individual Compensation Plan Configurations

Spot Bonus and Stock Grant Plan Configuration

Here's how you create a plan to make a onetime spot bonus payment or stock grant. Use the **Elements** and **Individual Compensation Plans** tasks in the Compensation work area.

1. Create a payroll element that makes a onetime payment. Configure the element to process once per payroll period and let managers enter the payment amount or grant quantity.
2. Create the plan.

    a. Add an option with the payroll element. For stock grants, be sure to set the nonmonetary units to **Shares** and select the grant type.
    b. Select a payment or grant start date. If it's present, leave the end date blank to indicate this is a onetime payment.
    c. Optionally, add an eligibility profile to limit the people that the plan applies to. For example, use derived factors to identify full-time people with a minimum service of 1 year as eligible for the spot bonus. Identify full-time people with a minimum service of 5 years as eligible for the stock grant.
    d. Restrict access to specific HR actions, such as **Hire** and **Promote**. Also add the **Manage Individual Compensation** action so that managers can award bonuses or grant stock to their people using the **Individual Compensation** action.

Stock grant records get the stock or trading symbol and grant type from the plan option. They get the grant date and number of shares granted from the element entries.

Related Topics

- Individual Compensation Plans

Car Allowance Plan Configuration

Here's how you create an ongoing car allowance plan with two payment options. The options vary according to the distance of regional territories from headquarters. Use the **Elements** and **Individual Compensation Plans** tasks in the Compensation work area.

1. Create two payroll elements to make recurring payments once a month. For territories within a 100-mile radius of headquarters, set the input value default to **300**. For territories beyond a 100-mile radius, set the input value default to **500**.
2. Create the plan.

    a. Configure an option for each payroll element.
    b. Let managers enter payment start and end dates according to agreements with their people. For example, a manager starts payment on the first of the month or the first payroll period after a promotion. They end payment after 1 year.

c. Attach an eligibility profile that limits plan eligibility to people with the **Regional Sales Manager** job.
d. Restrict access to specific HR actions, such as **Hire** and **Transfer**. Also add the **Manage Individual Compensation** action so that managers can award or update the car allowance for their people using that action.
e. Optionally, add instructions that tell managers how the payment policy varies according to the distance from headquarters. And, include a link to the policy.

Related Topics
- Individual Compensation Plans

Charity or Savings Contribution Plan Configuration

Here's how you create a plan that lets people manage their personal contributions. Use the Elements and Individual Compensation Plans tasks in the Compensation work area.

1. Create a payroll element to accept recurring contributions per payroll period. Configure the input value to be either a flat amount or percentage.
2. Create the plan.

    a. Add an option for contributions of either amount or percentage.
    b. Select a start date, typically January 1 of the next calendar year or after open enrollment.
    c. Restrict access to the **Manage Contributions** action to let people manage their instances of the plan. You can define periods when people can enroll for the first time, update existing contributions, or discontinue contributions. For example, let people always create allocations. Restrict when they can make updates or discontinuations to a specified period, such as an open enrollment period of November 15 through 30.
    d. Optionally, add instructions that clarify specific plan policies.

Related Topics
- Individual Compensation Plans

23 Compensation History

Compensation History Categories

This topic describes the four summary table categories for compensation history: Salary, Stock, Other Compensation, and Recurring Payments. The summary table shows, by category, all included compensation given to a worker, with links to detailed compensation allocation information. The summary displays 5 years of compensation history and the detail views display all years of compensation history.

Salary

The following table shows the three rows of information for the Salary category.

Row	Comments
Overall Salary	For the current year, it's the most recent pay rate. The rate'shown in the frequency of the worker's salary basis (such as hourly, monthly, or annually). For previous years, it's the pay rate on 31 December of the given year.
Annualized rate	Calculated using the worker's overall salary and the annualization factor of the salary basis frequency as of 31 December of the given year.
Percentage change	The difference in the worker's overall salary from the previous year, if history exists.

In the summary table, click the base pay link to view detailed information about salary history, percentage change, compa-ratio, and growth rate. The detail view includes links to individual base pay change records.

Stock

The Stock category displays a total for each grant type awarded in the unit granted, such as shares or options. In the summary table, click the grant name to view more information, such as grant date, vested shares, and the estimated value of unvested shares.

Other Compensation

The Other Compensation category displays nonrecurring monetary compensation such as commissions, bonuses, overtime, and reimbursable expenses. In the summary table, click the compensation name to view effective date, amount, currency, and grand total information about all awards.

You can see elements information with only input values that are numbers, integers, and money because history was designed to monetary and quantity compensation. For example, show salary, bonus, and allowance amounts and quantities of vested, unvested, exercised, and unexercised stock shares. Also, the overall view shows various totals, which can't be calculated for nonmonetary and nonnumeric values.

Recurring Payments

The Recurring Payments category includes the latest amount of recurring compensation, such as car allowances and education assistance. In the summary table, click the payment name to view effective date, amount, currency, and grand total information for an individual award or compensation amounts.

Related Topics

- How You Configure the Compensation History Summary Table

How You Configure the Summary Table for Compensation History

This topic explains how to configure the data that the summary table for compensation history displays in four categories: Base Pay, Other Compensation, Stock, and Recurring Payments.

- Compensation history automatically displays base pay and stock grants.
- You must add other compensation and recurring payments data to history.

Automatic Compensation History Setup

Compensation history automatically retrieves for the Salary and Stock categories, respectively:

- Base pay history from the salary table.
- Stock share grants from the stock table.

Manual Compensation History Setup

Other Compensation groups one-time payments, such as bonuses. Recurring Payments groups nonbase pay distributions such as allowances or tuition reimbursements. To include compensation in the Other Compensation and Recurring Payments history categories:

1. Click the Manage Compensation History task.
2. Select the payroll element and input value to add.

The payroll element definition automatically supplies the remaining data and determines the history category based on the recurrence of the payroll element.

Related Topics

- Compensation History Categories: Explained

24 Stock Grants

Manage Stock Grants in the Integrated Workbook

You can add and edit stock grant data and upload it into the application using an integrated Microsoft Excel workbook.

Download the Workbook

You manage stock grants in the Compensation work area.

1. In the Tasks panel tab, click **Manage Stock Grants**.
2. On the Search Results toolbar for the Manage Stock Grants page, click **Prepare Import Spreadsheet**.

Add Stock Grant Data

Copy the stock grant data provided by your supplier. Make sure that each row contains a unique grant date, grant ID, and grant number. The workbook adds a symbol in the Changed field to mark the rows that you added.

> **CAUTION:** Don't delete or reorder template columns. The upload process might fail.

Upload Stock Grant Data

When you're done, click **Upload**. The application uploads only those rows that are marked as **Changed** and ignores any changes in cells that don't have a white background.

> **CAUTION:** Don't select the **Upload and then immediately download** option when prompted during an upload. The data that you uploaded immediately downloads back into the workbook, hiding any errors that occurred during the upload.

Validating Changes

Open the Manage Stock Grants page and search for and view the imported stock grant data.

Resolve Errors

The upload process automatically updates the Status field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application.
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.

3. Upload the latest changes.

Related Topics

- How can I import stock data sent to me by my supplier
- Set Up Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Troubleshoot Desktop Integration for Excel

FAQ

How can I import stock data sent to me by my supplier?

On the Manage Stock Grants page, use the **Prepare Import Spreadsheet** button to generate the stock table spreadsheet. Enter your supplier's data, ensuring that each row contains a unique Grant Date, Grant ID, and Grant Number. Upload the information into the stock table.

25 External Data

External Compensation Data

You can add compensation-related information from third-party and legacy applications, such as pension, annuity, royalty, and assignment segments. You can include this external data as default values in worksheet columns for workforce compensation plans. You can also include it as compensation items in total compensation statements.

Person by Person or Many People at a Time

You can manually enter data for one person at a time using the **External Data** task in the Compensation work area. On the same page, you can use the **Prepare Import Spreadsheet** button to import external data for many people at a time.

Data to Add

Here's the data you add, regardless of method:

- Record type
- Start Date
- End Date
- Sequence Number
- Currency
- Columns, such as **Column 01** and **Column 02**

To avoid difficulties when adding other data in the future, be sure to provide all relevant data, such as end date, sequence, and currency. For example, if you're external data includes amounts, you might need the currency to ensure calculations handle the amounts correctly.

Person-Level Data to Assignment-Level Data

You can add external data at the person or assignment level. Adding it at the assignment level lets you use assignment-level security. You can update personal-level external data to assignment-level using the **Update Assignments** process. The process updates the data to the primary assignment as of the start date for the external data record.

Related Topics

- External Data Lookups
- Import External Compensation Data in the Integrated Workbook

Record Type Lookups for External Compensation Data

When you import data from third-party or legacy applications, you need to select the record type. The record types in the choice list come from the **CMP_EXTERNAL_DATA_RECORD_TYPE** lookup type. You can change delivered values, such as **Data from a third-party supplier application**, at any time. And you can add new values. For example, you add a lookup code to identify data from the third-party partner that manages your pension, annuity, royalty, or 401k.

Use the **Lookups** task in the Compensation work area.

Related Topics

- Overview of Lookups

Import External Compensation Data in the Integrated Workbook

You can enter and edit external compensation data, such as third-party or legacy data, using an integrated Microsoft Excel workbook. Then, upload the data into the application.

Before You Start

You might optionally want to create your own lookup codes if you find the two delivered codes too broad. For example, you might want to create lookup codes for pension or sales incentive data. Add a **CMP_EXTERNAL_DATA_RECORD_TYPE** lookup code using the **Manage Lookups** task in the compensation work area.

To use the imported data, you need to complete one or both of these tasks, either before or after the import:

- To use the external data in workforce compensation, configure one or more user-defined worksheet columns.
- To show external data in total compensation statements, create one or more compensation items with a source type of **External Data**.

Generate the Workbook

Create the external data workbook in the Compensation work area.

1. On the Tasks panel tab under Common Configuration, click **Manage External Data**.
2. On the Manage External Data page, click **Prepare Import Spreadsheet** to create the workbook.

Enter External Data

Add enough rows to accommodate your supplier's data. Copy the external compensation data and paste them into cells with a white background. The workbook adds a symbol in the **Changed** field to mark the rows that you added. Reordering or removing columns in the import file causes the upload process to fail.

Upload External Data

When you finish, click **Upload**. The application uploads only those rows marked as **Changed**. It ignores any changes in cells without a white background.

> **CAUTION:** Don't select the **Upload and then immediately download** option when prompted during an upload. The data that you uploaded immediately download back into the workbook, hiding any errors that occurred during the upload.

Validate Changes

On the Manage External Data page search for and select the start date and record type, or other search criteria.

Resolve Errors

The upload process automatically updates the **Status** cell in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application.
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

New uploads to existing data make date-effective changes to the data.

Related Topics

- External Data Lookups
- Set Up Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Troubleshoot Desktop Integration for Excel

FAQ

How can I add external compensation data for multiple assignments?

Enter a unique assignment ID for each row of data on the Manage External Data page of the Compensation work area.

26 Workforce Compensation Overview, Lookups, and Security

Overview of Workforce Compensation

Let managers and specialists allocate compensation, such as merit increases or stock grants, to groups of people on a focal, anniversary, or periodic basis. This includes letting them promote people and rate performances while allocating compensation, as well as communicating compensation changes. Also set up managers so they can automatically calculate and allocate compensation using models and analyze proposed changes to ensure outcomes like these:

- Equity among peer groups and by manager
- Alignment with the market and with organizational compensation strategies for performance

You do all of this when you set up your workforce compensation plans. The setup involves configuring the foundation, budgets, worksheets, models, and reports aspects of each plan. Managers and specialists use the worksheets to propose compensation, performance ratings, and promotions. They also use them to approve proposed changes and communicate the changes. You can also optionally extend certain lookups that people in various job roles use in the workforce compensation cycle. And you can use a fast formula to retrieve data or run calculations on data.

Reason Lookups

When you adjust a budget, you include a reason. The budget audit history shows this reason, along with the adjustment and other budget changes. The **CMP_BUDGET_AUDIT_REASONS**lookup type already has the following reasons set up. You can't change or delete them, but you can add reasons that support your adjustment policies. The codes that start with CMP appear in audit history.

- Worker eligibility change
- Eligible salary change
- Worker budget change
- Budget automatically issued
- Budget distributed by manager
- Manager budget change
- Worksheet budget change
- Worker reassignment
- Initial budget
- Miscellaneous adjustment
- Supplemental funding

You configure lookups in the Compensation work area using the **Lookups** task.

Related Topics

- Overview of Lookups

Nonmonetary Unit of Measure Lookups

You use nonmonetary units of measure throughout workforce compensation, for example, to set up a compensation worksheet for stock grants. The **CMP_NONMONETARY_UOM**lookup type already has these units of measure set up, which you can change and add to, to support your compensation policies.

- Days
- Hours
- Items
- Shares
- Units

You configure lookups in the Compensation work area using the **Lookups** task.

Related Topics

- Overview of Lookups

User-Defined Column Lookups

To let managers select from relevant choice lists on task worksheets, you can enable a column and configure the associated user-defined lookup type. For example, you create a user-defined column called **Up For Promotion**. Then you configure the related user-defined lookup type with these meanings: **Yes** and **No**. Managers can use the user-defined column to indicate if people are up for promotion.

These are the bundled user-defined column lookup types.

- CMP_CWB_CUST_COL_46_LIST
- CMP_CWB_CUST_COL_47_LIST
- CMP_CWB_CUST_COL_48_LIST
- CMP_CWB_CUST_COL_49_LIST
- CMP_CWB_CUST_COL_50_LIST

While the bundled lookup code **Meaning** is **DEFAULT**, any lookup codes you add need to be only numeric. The meanings can be characters, numbers, or a combination of both. You configure lookups in the Compensation work area using the **Lookups** task.

Related Topics

- Overview of Lookups

Workforce Compensation Security

The workforce compensation tasks, plans, and task worksheets that people can use and access depend on plans, user roles, and security profiles setup.

Person Security Profile

To determine the managers a higher-level manager or specialist can switch to on the Workforce Compensation page, you set up security profiles. The profiles also determine individuals that people can handle changes for on the Administer Workers page in the Compensation work area. And, the profiles determine the people included in the full administration download. The profiles don't affect the people managers see in the task worksheets of a workforce compensation plan.

User Roles

Bundled job roles and duty roles determine the people who can use workforce compensation tasks and work with workforce compensation plans. You can also create your own roles to grant or remove access to specific compensation tasks.

Plan Configuration

At a more granular level than the profiles and roles, you can specify the managers who can access the plan tasks. You can also specify the people they can see on each task worksheet using the plan hierarchy. To further limit plan access, you can use plan access overrides and plan status controls. For example, you can make plans available to only compensation administrators using the plan status controls.

Reference

For more information about workforce compensation security, see Security and Workforce Compensation (document ID 1556468.1) on My Oracle Support at https://support.oracle.com.

Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets

Do you want to secure access to your workforce compensation plans and if so, how? Here are some key considerations:

- Do you want to let managers and HR specialists only view plans and let only compensation administrators make changes? You can do this when you configure plan access as part of the foundation plan setup.
- Do you want to let managers change plan access for their subordinate managers? You can do this when you configure approvals and notifications as part of the worksheets plan setup.
- Do you want to let managers change worksheet access for their subordinate managers? You can do this when you configure actions as part of the worksheets display plan setup.

Here are some scenarios and example access configurations.

Scenario	Example Configuration	Workforce Compensation Plan Task
Limit compensation manager access using the **Act as Proxy** task according to roles.	When you configure plan access, add roles in the Roles with the Plan Access from the Compensation Work Area section.	Configure Plan Access
Limit when managers access their plan worksheets.	To start, when you configure plan hierarchies, set a default access level to determine who has immediate access, such as compensation administrators. Or you can use a fast formula. During the workforce compensation cycle, when managers can access their plan worksheets, compensation administrators can change manager access using the plan approvals task. Or plan administrators can change the worksheet display configuration to enable the approvals task to let managers change the access of their subordinate managers.	Configure Plan Hierarchies

Related Topics

- Workforce Compensation Plan Hierarchies
- Workforce Compensation Plan Access

27 Workforce Compensation Plans Overview

Overview of Workforce Compensation Plan Configuration

People use workforce compensation plans to allocate budgets to managers and compensation to groups of people during a compensation cycle. The plans are highly configurable, so you can determine the specific tasks and information that a plan provides to administrators, managers, and specialists. For example, for one plan, you enable budgeting so the plan includes the **Manage Budgets** task. You also include the compensation tasks **Adjust Salary**, **Allocate Bonus**, and **Allocate Stock**, the communications task **Communications**, and the approvals task **Approve**. For another plan, you don't enable budgeting so the plan won't include the **Manage Budgets** task. You do set the plan up to include the compensation task **Allocate Award**, the communications task **Statement**, and the approvals task **Approvals**.

To set up a plan, use the **Workforce Compensation Plans** task in the **My Client Groups** > **Compensation** work area to configure these aspects:

- **Foundation**: Set up details, such as the employment records the **Start Workforce Compensation Cycle** process evaluates for the plan. Also specify if the plan is active or inactive, configure eligibility, and identify cycle dates that determine plan access and eligibility. Set hierarchies that determine whether people have primary responsibility for the plan, can provide suggestions, or can only review the plan. And enable currency switching and configure currency properties, set up plan access, and configure a feedback survey and plan information.
- **Budgets**: Specify how to distribute budgets, set up budget groups, and identify storage methods for budget pools. Also track on-cycle and off-cycle compensation against the budget.
- **Worksheets**: Determine which worksheets to include in a plan as well as display properties, dynamic calculations, alerts, and assignment segments. Managers and specialists use these worksheets to propose compensation, performance ratings, and promotions. They also use them to approve proposed changes and communicate the changes.
- **Models and Reports**: Let managers and specialists build compensation models that help them align their budgets and compensation allocations with organizational pay practices and guidelines. Let them automatically allocate modeled amounts according to each person's country, job, grade, and quartile. And create Oracle Transactional Business Intelligence reports to give managers and specialists relevant contextual information so that they can make informed compensation changes. Also configure plan filters and analytics.

Performance Considerations for Workforce Compensation Plans

You need to consider how responsive workforce compensation plans are when determining how many plans to create. Plans can include a few or many simple dynamic calculations and few or many complex calculations. The more dynamic calculations and the more complex the calculations, the slower the plans respond when people change different values.

To optimize plan performance, you want to create plans tailored to specific audiences. For example, compensation administrators want to optimize compensation budgets and allocations across their client groups. They typically need more information to test different allocation scenarios beyond what the modeling functionality can handle. Line managers though want the absolute minimum information that they need to make appropriate allocations across their teams. And they want any contextual or background information about their people in reports or a detailed worksheet that they can look at separately, as needed.

You create separate plans for each audience. The plans for compensation administrators include the dynamic calculations and fast formulas that can slow plan performance. The plans for line managers include cross-references to key calculations in the administrator plans, so the managers can see critical calculation results. And manager plans can include fewer dynamic calculations with simpler conditions, as appropriate. Or you might let managers use models to explore allocation scenarios instead of configuring dynamic calculations for their plans.

To further optimize plan performance, you want to validate each plan. Validation lets you check that the evaluation order for dynamic columns is correct and generates the results expected by the plan audience. It also helps you determine the optimal number of dynamic calculations and alerts to include so the plan responds as each audience considers acceptable.

Related Topics

- Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets

28 Foundation: Plan Details in Workforce Compensation

Employment Records to Use in the Compensation Cycle

You can specify the employment records used by the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes when you configure plan details.

Primary Assignments

The processes include people and set their eligibility status according to only their primary assignments. Anyone who has multiple assignments and a plan that uses a manager hierarchy appears only on their primary assignment manager's worksheet.

All Assignments

The processes include people and set their eligibility status according to all of their assignments. Anyone who has multiple assignments might appear on their manager's worksheet more than once. And they might have different eligibility statuses. For example, they might have an **Eligible** status according to the primary assignment and an **Ineligible** status according to another assignment. If the manager for each assignment is different, the individual might appear on worksheets for multiple managers.

Employment Terms

The processes include people and set their eligibility status according to the employment terms of legal employers using the three-tier employment model. If the plan uses a manager hierarchy, people appear on the primary assignment manager's worksheet.

The processes exclude people whose legal employers have employment terms that use the two-tier employment model.

Any Assignment or Employment Term with a Salary

The processes include people and set their eligibility status for all of their assignments and employment terms that have a linked salary record. If the plan uses a manager hierarchy, people appear on the primary assignment manager's worksheet. Anyone who has multiple assignments with a salary record might appear on their manager's worksheet more than once. They could have a different base salary for each assignment. And they might have different eligibility statuses. For example, they might have an **Eligible** status according to the primary assignment and an **Ineligible** status according to another assignment. If the manager for each assignment is different, the individual might appear on worksheets for multiple managers, with different salaries for each.

The processes exclude people whose assignments and employment terms don't have a linked salary record.

Active and Inactive Workforce Compensation Plans

When you configure plan details, you need to specify whether the plan status is **Active** or **Inactive**.

Compensation cycles include active plans. At any time during specified cycle dates, line managers can access their active plans using the **Workforce Compensation** task for their team. Even after approved changes transfer to HR, compensation managers can view plans using the Compensation task for their client groups.

Subsequent workforce compensation processes exclude inactive plans. Line and compensation managers can't view or update the plans. Typically, you use this status to create and test plans, or for obsolete plans. You can purge only inactive cycles.

Compensation administrators can change the status back to **Active** at any time.

Actions and Reasons in Workforce Compensation

To provide context, all salary and assignment changes include an action and optional action reason. You need to select the action when you configure plan details. The bundled action that you can set in plan details is **Allocate Workforce Compensation**.

If the plan includes different task worksheets for different allocation types, such as merit increases, bonuses, and stock shares, you don't select an action reason. If the plan focuses on a single action, you can select the appropriate action reason. For example, you create a plan where managers change compensation according to performance evaluations, so you select the **Performance** action reason.

The action and reason are stored with all salary and assignment changes that transfer to HR after the compensation cycle is complete. Changes from the performance evaluation plan would show in people's salary history as **Allocate Workforce Compensation** and **Performance**.

Here's a comprehensive list of the bundled compensation action reasons.

- Anniversary
- Career Progression
- Cost of Living Adjustment
- Market Adjustment
- Mass Adjustment
- Merit
- Performance
- Periodic Review
- Promotion

You can extend the available actions and action reasons using the Configure Actions and Action Reasons quick actions under **My Client Groups** > **Workforce Structures** .

Related Topics

- Reason Lookups
- How Action Components Work Together

29 Foundation: Plan Eligibility and Cycles in Workforce Compensation

Workforce Compensation Plan Eligibility

You determine the people who are eligible and ineligible for allocations from workforce compensation plans with eligibility profiles. Here are examples of available criteria:

- Personal, such as gender and home location
- Employment, such as assignment status, hourly or salaried, grade, job, and performance rating
- Derived factors, such as age, length of service, or a combination of both
- Other, such as formula and user-defined criteria
- Labor relations, such as bargaining unit, union, and collective agreement

Add the relevant profiles when you configure plan eligibility. You can also create additional profiles to add, as needed.

Tip: Make sure that on your eligibility profiles, you set **Assignment to Use** to **Specific assignment**.

The profile configuration determines what it means to meet criteria. The **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes set the status of people who meet inclusion criteria to **Eligible**. The processes set the status of people who don't meet inclusion criteria, or who do meet exclusion criteria, to **Ineligible**. For managers whose personal status is **Ineligible** with subordinates who's status is **Eligible**, the processes set the manager eligibility status to **Limited**.

Related Topics

- How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together
- How Eligibility Works With Other Objects
- Eligibility Profiles

How Required and Optional Profiles Determine Compensation Eligibility

If you add only one eligibility profile, people have to meet the profile criteria before the processes can set their eligibility statuses. This requirement is true, even if you don't select **Required**. Here's what the processes require when you add multiple eligibility profiles:

- If all profiles are optional, people have to meet the criteria of at least one profile before the processes can set their eligibility statuses.
- If all profiles are required, people have to meet the criteria of all profiles before the processes can set their eligibility statuses.

- If some profiles are required, people have to meet the criteria of all required profiles and at least one optional profile. Then the processes can set their eligibility statuses.

Related Topics

- How Eligibility Works With Other Objects
- Eligibility Profiles

Option to Track People Ineligible for a Workforce Compensation Plan

You can track ineligible people when you configure plan eligibility. The **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes include these people on the plan worksheets. These people also appear on the Compensation work area, Administer Workers page. Each person has an eligibility status of **Ineligible** and none of their fields are editable. Because these people are visible, plan managers and administrators can change statuses to **Eligible**, as they deem appropriate. The approving manager reviews the status and proposed compensation changes when determining whether to approve or reject the submitted plan.

> **Tip:** You can include ineligible people on worksheets and let managers hide them when they want by enabling the Hide Ineligible Workers action for plan worksheets.

When you don't track ineligible people, administrators must manually process the people to include them in the plan.

Related Topics

- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets

How the Options to Track and Hide Ineligible People Affect Plan Worksheets

You determine which people the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes include on the plan worksheets.

Track Ineligible Workers	Hide Ineligible Workers	Worksheet Effects of Start Process	Worksheet Effects of Refresh Process
Selected	Selected	Doesn't add newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle drop off the worksheet.
Selected	Cleared	Adds newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle remain on the worksheet. This includes people whose

Track Ineligible Workers	Hide Ineligible Workers	Worksheet Effects of Start Process	Worksheet Effects of Refresh Process
			termination date is between the cycle evaluation start date and the HR data extraction date.
Cleared	Selected	Doesn't add newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle drop off the worksheet.
Cleared	Cleared	Doesn't add newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle remain on the worksheet. This includes people who meet the eligibility criteria and whose termination date is between the cycle evaluation start date and the HR data extraction date.

Eligibility Profile Testing for a Workforce Compensation Plan

You can test the eligibility profiles you add when configuring plan eligibility. The test lets you select a cycle, a sample person, and an active assignment for your test. Data security applies, so the person and assignment you can see for the cycle depend on your privileges. The test then tells you how long it took to evaluate the profiles and shows the test results. If profile criteria includes fast formula, you can see if it worked correctly by reviewing the formula logs.

Workforce Compensation Plan Cycle Dates

You determine various aspects of workforce compensation cycles, such as plan access and eligibility, when you configure plan cycle dates. You can reuse workforce compensation plans across multiple cycles, with a unique set of dates for each cycle. Here's a comprehensive list of the dates you can set.

Date	Description
Evaluation Period Start and End Dates	Period in which, such as a calendar or fiscal year, a quarter, or a month, when you can evaluate groups of people for compensation allocations. Typically, fast formulas use these evaluation periods. Informational only.
Plan Access Start and End Dates	Read-only period when managers can see their active plans. For example, they can review their people and contextual information to prepare for upcoming allocations.
Worksheet Update Period Start and End Dates	Active period when managers and administrators can make changes to their active plans.

Date	Description
HR Data Extraction Date	When the **Start Workforce Compensation Cycle** process initially extracts person and assignment data from HR employment records, and places it in the compensation tables. Also the date that the **Refresh Workforce Compensation Data** process uses to update the data already in the compensation tables.
Eligibility Determination Date	When the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes evaluate the specified employment records to determine people's eligibility status.
Currency Conversion Date	When the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes obtain conversion rates from the general ledger daily rates table. Plans use the rates to convert monetary amounts for different currencies.
Performance Rating Date	Date that identifies which workforce compensation plans share changes to compensation performance rating. Plans with the same date share any rating changes. To include performance rating information in compensation change statements, you need to select a date. But, the date doesn't affect the sharing of development and performance ratings between Oracle Fusion Performance Management Cloud Service and the workforce compensation plan.
Default Promotion Effective Date	When the **Transfer Workforce Compensation Data to HR** process sets everyone's job, grade, and position changes to take effect. Date the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes use to get the new salary range, compa-ratio, and salary metrics for people whose grade changed. To make proposed promotions available in multiple plans when managers promote people, use the same date across the plans. Also, you can let managers override this date when you configure worksheet column properties. Or you can set an override date when you run the **Transfer Workforce Compensation Data to HR** process.
Default Due Date	When managers need to submit their plan changes. You can configure different due dates by hierarchy level. Optionally, you can notify managers when a date changes.
Market Composites Effective Date	When the **Start Workforce Compensation Cycle** process extracts market composite information. It places the information in the compensation tables according to job or position, and location or segment.

30 Foundation: Hierarchies in Workforce Compensation Plans

Workforce Compensation Plan Hierarchies

You can give multiple managers different levels of access to people's allocation during a compensation cycle when you configure hierarchies for workforce compensation plans. These hierarchies determine the primary and secondary plan managers and the people they see in their worksheets. It also determines the plan reviewers and the people they see. The primary hierarchy also determines how budgets roll down to subordinate managers and approvals route to higher-level managers.

Examples

Here are some scenarios and examples of how you can configure hierarchies.

Scenario	Example Hierarchies
Country leaders need to manage the budget and line managers need to allocate compensation for their organization.	Set the source of the primary hierarchy to **Other Manager Hierarchy** and then select the appropriate manager type for the country leader. Set the source of the secondary hierarchy to **Primary Manager Hierarchy**.
Dotted-line managers need access to people's compensation, for example, if they completed projects for these managers during the compensation cycle.	Set the source of the primary hierarchy to **Primary Manager Hierarchy**. Set the source of the secondary hierarchy to **Other Manager Hierarchy** and select the appropriate manager type for the dotted-line managers, such as **Project Manager**. Or you can use a fast formula to determine the dotted-line relationship.
Country-specific HR specialists need access to everyone in their country, regardless of who people's primary plan managers are.	Set the source of the primary hierarchy to **Primary Manager Hierarchy**. Set the source of the reviewers hierarchy to a fast formula that determines the country-specific HR specialist.

Related Topics

- How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together
- Configure Approvals for Workforce Compensation Plan Worksheets
- Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets
- Primary, Secondary, and Other Workforce Compensation Plans

Options to Configure Workforce Compensation Plan Hierarchies

To give multiple managers different levels of access to the same people, you can configure up to three hierarchies for a single workforce compensation plan.

Source

To build the management and optional reviewers hierarchies for each plan worksheet, you select a source. You need to select a source for the primary hierarchy, even if you don't configure secondary or reviewers hierarchies.

Source Option	How It Determines the Management Hierarchy
Primary Manager Hierarchy	Uses the primary manager associated with each person's assignment To use the new HCM position management structure instead of primary managers, sync the position managers with people's assignments. Then select this source. As position managers change, you need to sync the managers and assignments again. Then run the **Refresh Workforce Compensation Data** process.
Other Manager Hierarchy	Uses the specified manager type associated with each person's assignment, such as project, resource, or regional manager To use this hierarchy instead of primary managers, make sure that the manager type you select is on people's assignments. If the managers with that manager type change during an open cycle, you need to update the assignments. Then run the **Refresh Workforce Compensation Data** process.
Formula	Uses the specified hierarchy determination fast formula
Position Tree	Uses the structure of the specified position tree For this source to determine the correct hierarchy, you need to sync position managers to people's assignments. Then use the primary line manager hierarchy.
Department Tree	Uses the manager defined for the specified department tree

Missing Managers

You can specify how to handle people who don't have a manager. The available options vary depending on the selected source.

Missing Relationships

You can record missing relationships in the log files for the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes. When you select this option, the processes include hierarchy breaks in the log files, for example, when a plan manager doesn't have a manager. Or when an individual doesn't have a primary manager on their assignment. You want to correct hierarchy breaks so workforce compensation plans roll up properly and include all eligible individuals.

Default Access Level

You decide the update and access levels for managers by selecting a default access level or by using a formula. You might use a formula when you want to set up different access to different sets of managers. For example, you select a formula that lets only managers at or above **Grade M4** make updates. It also specifies that all other managers in the source hierarchy get no access.

Changing the access level doesn't change the hierarchy.

> **CAUTION:** If you select **Refresh default access level when you run the refresh data process** and access changes, the next time the refresh process runs, it resets access to the default.

Related Topics

- Workforce Compensation Plan Hierarchies
- Formula Type for Compensation Hierarchy Determination
- Overview of Using Formulas
- HCM Trees HCM Trees
- How Line Managers Are Synchronized Using Position Hierarchy

Reference

Formula Type Is Compensation Hierarchy Determination

To build your own management or reviewer hierarchy for use in a workforce compensation plan, you can create formulas using the **Compensation Hierarchy Determination** formula type. You select the formula when you configure hierarchies for the workforce compensation plan.

Here's a comprehensive list of the contexts available to this type of formula:

- DATE_EARNED
- EFFECTIVE_DATE
- HR_ASSIGNMENT_ID
- END_DATE
- START_DATE
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID

- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID
CMP_IV_PERSON_ID	Number	Y	Worker ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_EXTRACTION_ DATE	Date	Y	Plan Extraction Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_ DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_PERSON_ID	Number	Y	Person ID of manager
L_ASSIGNMENT_ID	Number	Y	Assignment ID of manager

Or

Return Value	Data Type	Required	Description
L_PERSON_NUMBER	Number	Y	Person number of manager

The **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes show this error when they can't find the assignment ID:

- Formula passed in an invalid person number <15465857>. Assignment ID couldn't be obtained.

This sample formula determines the manager of a person when the assignment_id is passed.

```
/************************************************************
FORMULA NAME : Compensation Hierarchy Determination Formula
FORMULA TYPE : Compensation Hierarchy Determination
DESCRIPTION: Hierarchy determination fast formula which is based on assignment_id
*************************************************************/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number)/*===========
 INPUT VALUES DEFAULTS ENDS======================*/

/*================ FORMULA SECTION BEGIN =======================*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
L_PERSON_ID = '0' L_ASSIGNMENT_ID = '0'
 if (CMP_IV_ASSIGNMENT_ID = 100000008154060 ) THEN
(
L_PERSON_ID = to_char(-999) //-999 indicates top level
//Manager.
L_ASSIGNMENT_ID = to_char(-999)
)
ELSE
(
L_PERSON_ID = to_char(100000008153756)
L_ASSIGNMENT_ID = to_char(100000008154060)
)

RETURN L_PERSON_ID , L_ASSIGNMENT_ID

/*================ FORMULA SECTION END =======================*/
```

Related Topics

- Options to Configure Workforce Compensation Plan Hierarchies
- Formula Compilation Errors
- Formula Execution Errors
- When do I run the Compile Formula process
- Example of Writing a Fast Formula Using Formula Text

Formula Type Is Compensation Default Access Level

To determine the access level for the selected workforce compensation plan hierarchy, you can create formulas using the **Compensation Default Access Level** formula type. You select formulas of this type on the Configure Hierarchies page.

Here's a comprehensive list of the contexts available to this type of formula:

- DATE_EARNED
- EFFECTIVE_DATE
- END_DATE
- START_DATE
- HR_ASSIGNMENT_ID
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID
- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_PLAN_EXTRACTION_ DATE	Date	Y	Plan Extraction Date
CMP_IV_HIERARCHY_TYPE	Char	Y	Hierarchy Type
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date

Input Value	Data Type	Required	Description
CMP_IV_PERFORMANCE_EFF_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
UPDATABLE	Char	Y	Updatable
READONLY	Char	Y	Read-only
NOACCESS	Char	Y	No Access

This sample formula determines if a person is selected for a workforce compensation plan based on their assignment_id.

```
/*******************************************************************
FORMULA NAME : Compensation Default Access Level
FORMULA TYPE : Compensation Default Access Level
DESCRIPTION : Assignment_id based selection fast formula
*******************************************************************/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)
/*=========== INPUT VALUES DEFAULTS ENDS======================*/

/*================ FORMULA SECTION BEGIN ======================*/

 DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0

 l_selected = 'Y'

 /* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/

 if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
 (
 l_selected = 'NOACCESS'
 )
 else
 (
 l_selected = 'UPDATABLE'
 )
```

```
 RETURN l_selected
/*================= FORMULA SECTION END ========================*/
```

Related Topics

- Formula Compilation Errors
- Formula Execution Errors
- When do I run the Compile Formula process
- Example of Writing a Fast Formula Using Formula Text

31 Foundation: Plan Currency, Access, Feedback Survey, and Info in Workforce Compensation

Workforce Compensation Plan Currency

You can let managers switch between the corporate currency, their preferred currency, and their people's local currencies. If you don't let people switch, then everyone sees monetary amounts in the corporate currency. You can also specify the default currency to show in plan worksheets. You need to specify the conversion type and then select the corporate currency that applies across all plan worksheets. You set these options when you configure plan currency.

Optionally, you can set a rounding rule to apply for a specified currency. For example, you want to round Deutsche Marks (DEM) to nearest 10 and US dollars (USD) down to .01. These rules apply to any monetary columns that you enable in the worksheets when you set the column **Rounding Rule** to **Use Currency Rounding**.

Typically, you configure any rounding rules before running the **Start Workforce Compensation Cycle** process. For changes made during the cycle to take effect in the plan worksheets, you need to run the **Refresh Workforce Compensation Data** process.

Related Topics

- Enter Daily Rates Using the Daily Rates Spreadsheet
- Update Currency Rates

Workforce Compensation Plan Access

You can specify which job roles can and can't update workforce compensation plans when you configure plan access. When you set **Restrict Access** to **Yes** and don't do anything else, no one can see the plan, let alone update it.

To let people with the appropriate roles make plan updates, add the roles to the appropriate work area and set access to **Allow updates**. For example, you add the **Line Manager** role to the Workforce Compensation work area. You add the **Compensation Manager** role to the Compensation work area. And you allow both roles to make updates.

To let people with the appropriate roles only read the plan, add the roles to the appropriate work area. Also set access to **No updates allowed**. For example, you add reviewer roles to the Workforce Compensation work area and don't allow updates.

To let people with the appropriate roles set up plans, add the roles in the plan setup access section. Also set access to **Allow updates**. For example, you add the **Compensation Administrator** role to plan setup access and allow the role to make updates.

Related Topics

- How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together
- Workforce Compensation Security
- Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets

How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together

You determine who can access workforce compensation plans when you configure plan eligibility, hierarchies, and access as part of the foundation plan setup.

Plan Access Configuration

Your plan access configuration determines the roles that can and can't access the plan. By default, all roles can access.

Plan Eligibility Configuration

Your plan eligibility configuration has the criteria that processes use to determine the individuals who are and aren't eligible for the plan. If the plan access configuration lets managers access the plan and the managers have subordinates eligible for the plan, the managers can see the plan. But if they don't have any subordinates eligible for the plan, the managers won't see the plan.

Plan Hierarchies Configuration

Your plan hierarchies configuration determines the access level that managers have to the plan. If these conditions are met, the managers can see the plan and task worksheets:

- The plan access configuration lets managers access the plan.
- The managers have subordinates eligible for the plan.
- The default access level for the primary plan hierarchy is **Updates Allowed** or **No Updates Allowed**.

If the default access level is **No access**, the managers can't see the plan or task worksheets. This happens even if the other two conditions are met.

Related Topics

- Workforce Compensation Security
- Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets

Workforce Compensation Plan Feedback Survey

Let the people who use the plan to allocate workforce compensation during compensation cycles give you feedback on their experiences with the plan. This feedback can help you determine if you need to further refine plans to different audiences, such as compensation administrators and line managers. It can also help you refine what task worksheets and reports to include, and what information to include in each worksheet and report. These kinds of changes help you improve productivity and satisfaction with the plans over time.

You can let people provide ratings for their experiences and include up to five survey questions. You can view survey responses using the **View Administration Reports** task.

Related Topics

- Performance Considerations for Workforce Compensation Plans

Workforce Compensation Plan Information

You can provide additional information that administrators and managers might find useful when you configure plan information. And you can include important information, such as the manager due date and evaluation and plan access periods from cycle setup. You can also include text, for example, about new or updated compensation policies with links to relevant details.

This information shows up as a task in workforce compensation plans, in the area with the **Models and Reports** tasks.

32 Budgets: Budget Pools in Workforce Compensation Plans

Overview of Budget Pools in Workforce Compensation Plans

You can align focal compensation for your people with organizational strategies and policies using budget pools. Add anywhere from zero to five budget pools to your workforce compensation plan. For example, your plan has bonus, cost of living, merit, and stock compensation components. You can create two budget pools, one pool for the monetary allocations and one pool for the shares allocations. You can create a separate pool for each component. Or, you can use minimum and maximum options on the worksheet compensation components, explained in a later chapter, instead of setting up any pools.

To configure budget pools, you enable budgeting and then create the budget pools.

> **CAUTION:** Any changes you make to existing budget pools affect the plans they're part of. If the compensation cycle is open, you need to run the **Back Out Workforce Compensation Data** process. When it finishes, make your budget pool changes and then run the **Start Workforce Compensation Cycle** process.

Related Topics

- Budget Pools and Compensation Components
- Overview of Budget Display in Workforce Compensation Plans

Budgeting Methods in Workforce Compensation Plan Budget Pools

You specify whether budgets are worker or manager level when you configure budget pools.

Manager-Level Budgeting

You can specify whether to store budget amounts or percentages, automatically publish budgets, and allow over budgeting for the linked plan compensation components. Then primary plan managers can set the budget method for the budget worksheet, either the first time they open the budget, or on the worksheet. They can pass down budgets to only their subordinate managers who report directly to them. Or, they can pass down budgets to all of their subordinate managers in the primary hierarchy. Their selection determines the worksheet that opens.

The summary table doesn't show any budget information when managers filter worksheets to see information for their subordinate managers two or three levels down. The summary table does show them a message that budget details aren't available for this level of filtering, as appropriate. They can see summary budget information when they filter for their direct reports or all of their people.

Worker-Level Budgeting

You can store only budget amounts and only automatically publish budgets. You can't allow over budgeting. You can also let managers monitor worker-level budgets and control spending by configuring a budget group.

Related Topics

- Include a Budget Group in a Compensation Task Worksheet Summary

Budget Storage Methods in Workforce Compensation Plan Budget Pools

You can store your budgets as amounts or percentages. The storage method you select affects published budgets when managers reassign people to other managers or change their eligibility status.

Amounts

The published amounts stay with the manager when their total eligible salary changes, such as when they reassign people or change their eligibility status. For example, you publish a $100,000 budget to David. David publishes budgets for himself and his direct reports, Rosa and Lee, as shown here:

Manager	Total Eligible Salary (USD)	Calculated Budget Percentage	Stored Budget Amount (USD)
David	100,000	10	10,000
Rosa	500,000	10	50,000
Lee	400,000	10	40,000
Total	1,000,000		100,000

Then Lee reassigns one of his people with an eligible salary of $100,000 to Rosa. This reassignment decreases his calculated budget percentage and increases Rosa's, as shown here. The stored budget amounts remain unchanged.

Manager	Total Eligible Salary (USD)	Calculated Budget Percentage	Stored Budget Amount (USD)
David	100,000	10	10,000
Rosa	600,000	8.3	50,000
Lee	300,000	13.3	40,000
Total	1,000,000		100,000

Manager	Total Eligible Salary (USD)	Calculated Budget Percentage	Stored Budget Amount (USD)

Percentages

The published budget amounts change when a manager's total eligible salary changes, such as when they reassign people or change their eligibility status. For example, you publish a budget to David as 10% of total eligible salary. David publishes budget percentages for himself and his direct reports, Rosa and Lee, as shown here:

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
David	100,000	10	10,000
Rosa	500,000	10	50,000
Lee	400,000	10	40,000
Total	1,000,000		100,000

Then Lee reassigns one of his people with an eligible salary of $100,000 to Rosa. Now Lee's total eligible salary decreases and Rosa's increases, affecting their calculated budget amounts, as shown here:

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
David	100,000	10	10,000
Rosa	600,000	10	60,000
Lee	300,000	10	30,000
Total	1,000,000		100,000

Related Topics

- Budget Worksheet Actions

Automatically Publish Budgets in a Workforce Compensation Plan

You can specify whether the **Start Workforce Compensation Cycle** process automatically publishes budgets for manager-level budget pools. The process always publishes worker-level budget pools automatically. Every time you run the process, it distributes the new or updated budget pools that have automatic publishing enabled. How the process distributes the budgets depends on how you set up key columns when you configure budget display. The next chapter explains this setup in more detail.

The option to automatically publish budgets also affects how managers can distribute budgets using models.

Manager-Level Budgeting

The process distributes budgets as amounts to all managers with at least one subordinate manager when you set up these configurations:

- On the Summary tab, Table View, under Budget distribution, you can enable either the **Distributed Amount** or **Distributed Percentage** column, or both. The enabled columns appear in the top table of the budget worksheet, which shows the summary information for that primary plan manager's budget.
- On the Detail Table tab, under Budget Distribution, enable either the **Distributed Amount** or **Distributed Percentage** column, or both. The enabled columns appear in the bottom table on the budget worksheet. The table shows the budget information for each manager reporting to the primary plan manager.
- Optionally configure the column properties of only one of these four summary and detail columns to set a default value.

Worker-Level Budgeting

The process distributes budgets as amounts or percentages at the worker level when you set up these configurations.

- On the Worker List tab, under Budget, enable either the **Budget Amount** or **Budget Percentage** column, or both.
- Optionally configure the column properties of only one of these columns to set a default value.

The manager-level budgets are the sum of the individual worker budgets.

Models

If you configure models for the workforce compensation plan and enable automatic budget publishing, managers can publish budgets as part of their modeling. If you configure models but don't enable automatic budget publishing, managers can still use models to publish budgets. They have to take the extra step of going to the budget and publishing the model changes there.

Budget Is in Nonmonetary Units for a Workforce Compensation Plan

You can specify the budget units when you configure a budget pool. If you don't select the **Budget is in nonmonetary units** option, the units are the corporate currency set for the plan, such as **USD**. If you do select the option, you can specify the units, such as **Days**, **Hours**, **Items**, **Shares**, or **Units**.

Related Topics

- Nonmonetary Unit of Measure Lookups

Reset Amounts When Budgets Are Unpublished in a Workforce Compensation Plan

You can specify to reset amounts when budgets are unpublished, when you configure budget pools for a workforce compensation plan. When the primary plan manager unpublishes budgets, they reset summary and detail values.

Summary View Table Changes

Managers can see the summary view table in the header area of their budget worksheet. If you enable reset amounts, the unpublish action decreases the **Budget Distribution Amount** and **Budget Distribution Percentage** values by the original budget distribution amount.

When managers change the **Budget Amount** to **0**, they're also decreasing these summary values by the same amount:

- Budget Distribution Amount
- Budget Distribution Percentage

And they're increasing the **Available for Distribution** value by that same amount.

Detail Table Changes

Managers see the detail table in the main area of the budget worksheet. The table has separate rows for each of their subordinate managers, in a hierarchical representation. If you enable reset amounts, the unpublish action clears the **Budget Distribution Amount**, **Budget Distribution Percent**, and **Unpublished Amount** values in the detail section. It also sets the **Available Budget** to **0**.

Examples

Here are example summary and detail tables for the **Merit** budget worksheet before the manager unpublishes the budget for a specific subordinate manager. The monetary amounts are in USD.

Summary Table Columns Before Unpublish

Eligible Salary	Budget Amount	Budget %	Budget Distribution Amount	Available for Distribution	Budget Distribution %	Unpublished Amount	Available Budget
3,667,253	110,018	3	110,018	0	3	30,990	110,018

Detail Table Columns Before Unpublish

Manager	Eligible Salary	Budget Distribution Amount	Budget Distribution %	Unpublished Amount	Available Budget
Direct Reports	763,300.36	22,899.01	3.00		22,899.01

Manager	Eligible Salary	Budget Distribution Amount	Budget Distribution %	Unpublished Amount	Available Budget
Rosa	1,033,012.00	30,990.37	3.00	30,990.37	0
Lee	1,174,646.00	35,239.38	3.00		35,239.38
Blair	696,294.36	20,888.83	3.00	20,888.83	20,888.83

Here are those same tables after the manager unpublishes Rosa's budget amount of 30,990.37.

Summary Table Columns After Unpublish

Eligible Salary	Budget Amount	Budget %	Budget Distribution Amount	Available for Distribution	Budget Distribution %	Unpublished Amount	Available Budget
3,667,253	110,018	3	79,027.63	0	0	30,990	141,008.37

Detail Table Columns After Unpublish

Manager	Eligible Salary	Budget Distribution Amount	Budget Distribution %	Unpublished Amount	Available Budget
Direct Reports	763,300.36	22,899.01	3.00		22,899.01
Rosa	1,033,012.00				0
Lee	1,174,646.00	35,239.38	3.00		35,239.38
Blair	696,294.36	20,888.83	3.00	20,888.83	20,888.83

Over Budget Options for Workforce Compensation Plan Budget Pools

You can let managers reward performance during the compensation cycle, beyond their allotted budgets. You can provide this controlled flexibility when you configure budget pools.

Allow Over Budget When Budgeting

You can specify the maximum percentage over their allocated budgets managers can go when publishing budgets to their subordinate managers. Do this by enabling the **Allow over budget when budgeting** option.

Allow Over Budget When Allocating Compensation

You can specify the maximum percentage over their allocated budgets managers can go when allocating compensation for their people. Do this by enabling the **Allow over budget when allocating compensation** option.

Severity When Over Budget

You can specify whether to show warnings or errors when managers budget or allocate compensation between the published amount and the maximum overage. Managers get errors when they attempt to go over the maximum allowed overage.

Budget Group Options for Workforce Compensation Plan Budget Pools

To track and monitor worker-level budgeting for specific populations, you can set up a budget group. The budget group lets you identify, for example, everyone in the same country or grade. You set up the group when you configure a budget pool. You select a grouping column, such as **Country** or **Grade**, and specify whether to enforce the budgets by the grouping column. You can also let managers go over allocation up to a specific percentage. And you can specify whether they see warning or error messages when they over allocate in that range.

Related Topics

- Include a Budget Group in a Compensation Task Worksheet Summary

33 Budgets: Budget Display in Workforce Compensation Plans

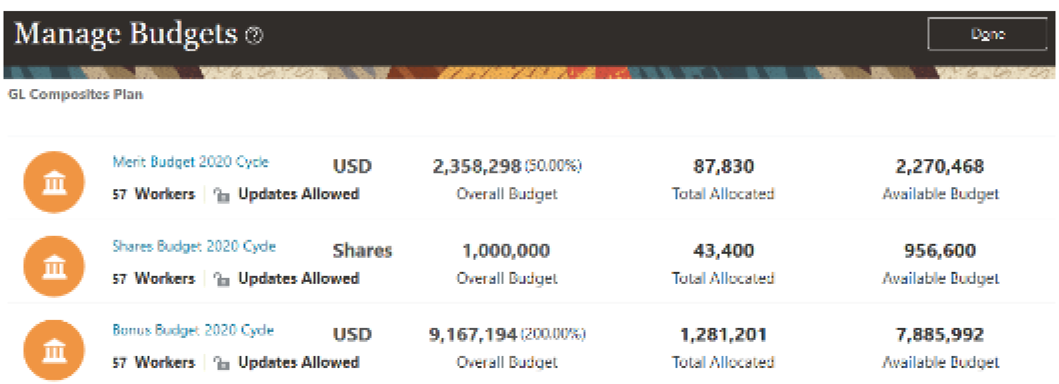
Overview of Budget Display in Workforce Compensation Plans

You determine the information that appears on the Manage Budget page and on the budget worksheet when you configure the budget display. You also determine the actions available on the worksheet and provide information that applies to the entire budget pool. For example, you communicate policy changes that affect budget allocation and include links to detail information.

Overview Configuration in Budget Display

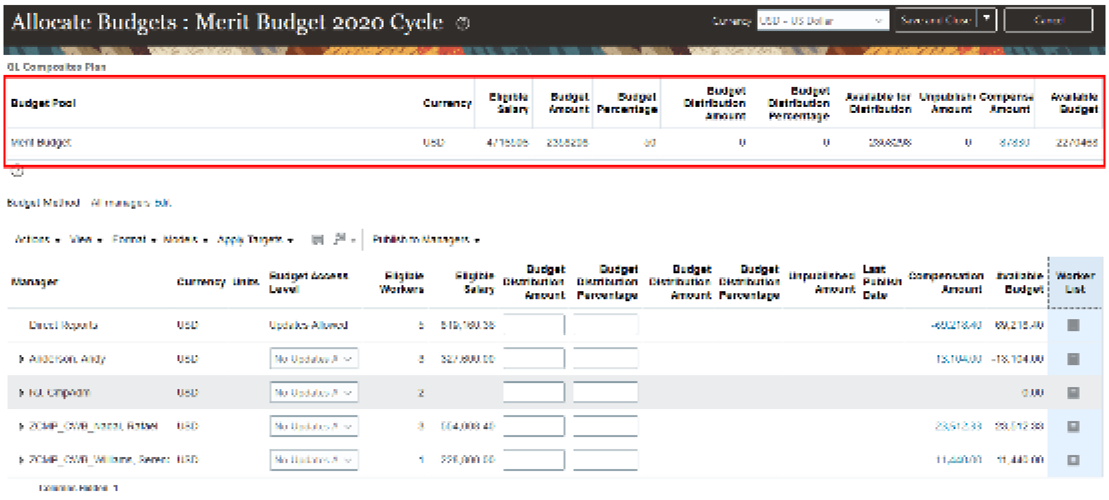
You can enable the columns that appear as overview information in the budget row on the Manage Budgets page. You can also override the display name for some columns. For example, you show the budget pool name and number of people eligible for the pool. And you change the **Workers** label to **Eligible People**.

When the budget is monetary, the **Units** value is the plan currency, such as **USD**. When the budget is nonmonetary, the **Units** value is whatever you selected for the budget pool, such as **Shares** for a stock budget.



Summary Configuration in Budget Display

You can enable the views that appear in the summary area of the budget worksheet, such as a scoreboard, a table, or both. If you enable both views, you also specify which view appears by default when managers open the worksheet. Here's an example budget worksheet with only the table view enabled.



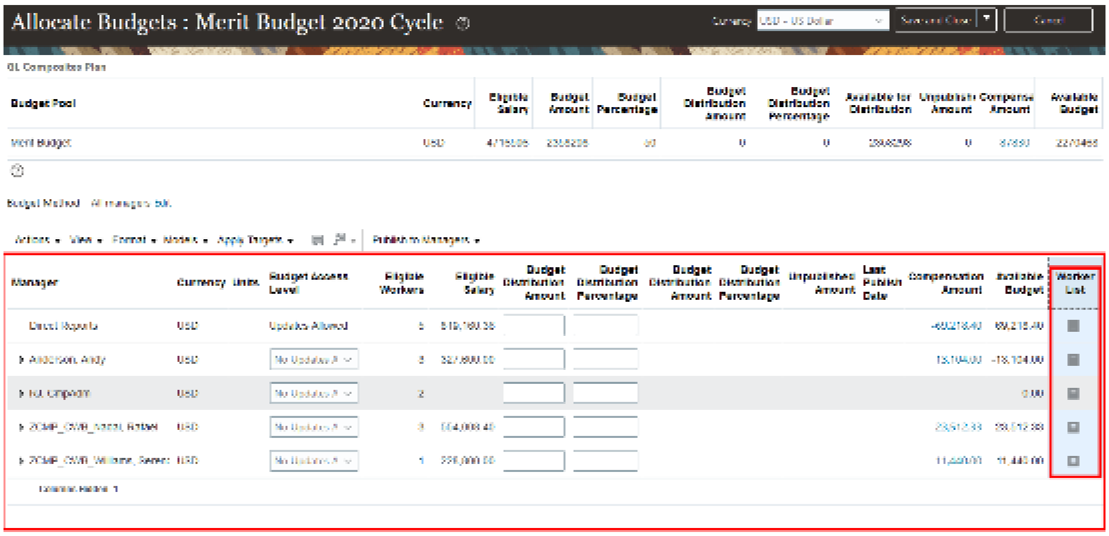
You can enable the columns that appear on the view and override all of the default display names. For example, you change **Budget Distribution Percentage** to **Budget Distribution %**. And you can override the default sequence of any column, as appropriate to best support how your managers expect their analytics. For the table view, use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the summary area.

You can also configure properties for the columns you enable, such as setting a rounding rule and the decimal places to display. The actual properties vary depending on the column. All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio.

Detail Table Configuration in Budget Display

You can enable columns from manager information, eligibility, budget distribution, targets, published budgets, and workforce allocation groups in the main table of the budget worksheet. You can also configure your own numeric columns for your enabled compensation components using the miscellaneous rate columns. You can enable the worker list column so people can open the worker list page. And you can enable the group view column to monitor worker-level budgeting.

> **Tip:** To prevent managers from inadvertently increasing their allocated budgets, don't enable the **Worker List** column for worker-level budgeting. If you do enable the column, managers can adjust the budget amounts for individuals, thus inadvertently increasing their allocated budgets.



Display Names and Column Sequences

You can provide meaningful column names for plan audience by changing the default display names. For example, you change **Eligible Salary - Component 1** to **Eligible Salary for Merit Increase**. And you can change the default sequence of any column, as appropriate. Use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the table.

Column Properties

You can also configure general properties for the columns you enable as well as default values. The actual properties depend on the column.

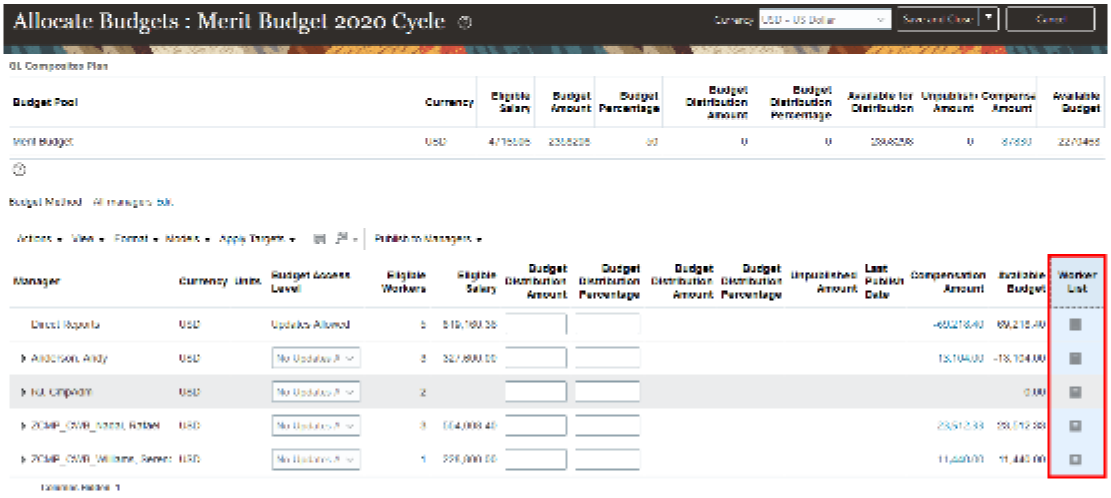
All columns include a **Plan Info** property that you can use to communicate useful information to plan audiences. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an **i** in it on the column header. They click the icon or hover over it to see the information.

Worker List Configuration in Budget Display

You can enable the columns that appear in the main table on the worker list page that managers open from the budget worksheet. You can override all of the default display names. For example, you change **Budget Percentage** to **Budget %**. And you can override the default sequence of any column, as appropriate. Use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the table.

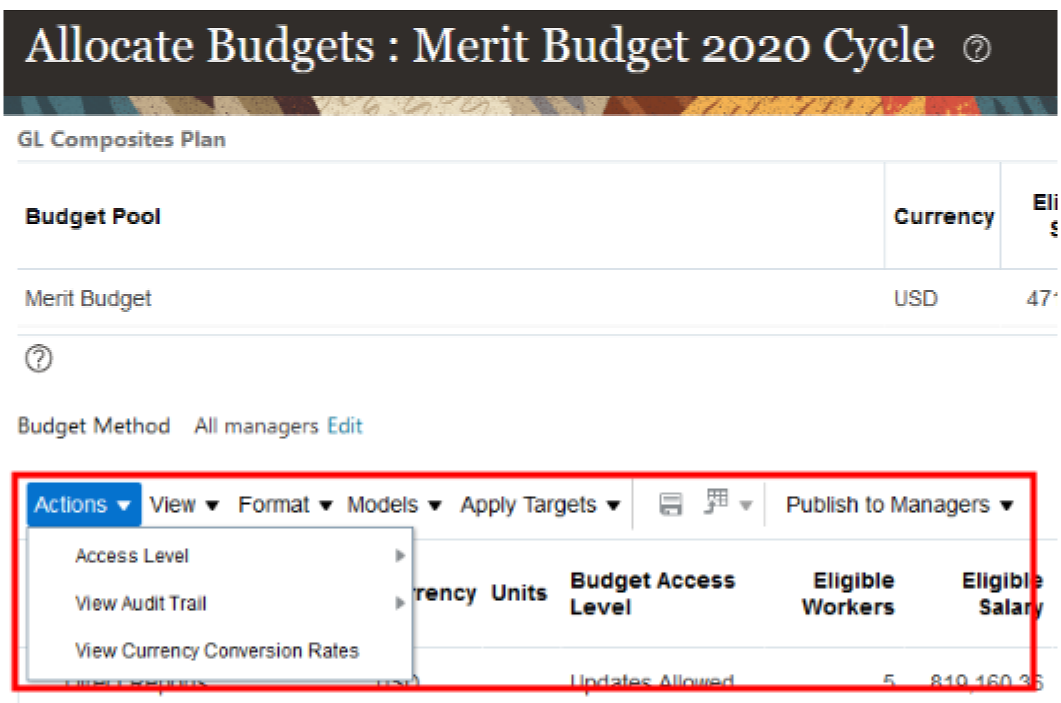
You can also configure properties for the columns you enable, such as setting a rounding rule or a default and override formula. The actual properties vary depending on the column. All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio.

> **Note:** If you don't enable the **Worker List** column on the Detail Table tab, the managers can't open the worker list page. Thus, they won't see any columns that you configure on the Worker List tab.



Actions Configuration in Budget Display

You can specify the options available on the **Actions**, **View**, and **Format** menus and on the detail table toolbar when you configure the budget display. And you can specify the actions available on the worker list page, such as **Request Eligibility Change** and **Reassign Workers to Another Manager**.



Note: If you don't enable the **Worker List** column on the Detail Table tab, the managers can't open the worker list page. Thus, they won't see any options that you configure on the Actions tab.

Related Topics

- Budget Worksheet Actions
- Compensation and Promotion Worksheet Actions
- Performance Worksheet Actions
- Approval Worksheet Actions
- Communication Worksheet Actions

Information Configuration in Budget Display

You can provide managers with important budgetary information in the header of the budget worksheet when you configure the budget display. For example, you can explain policies that apply to the budgets for the upcoming focal compensation cycle and include links to details. You can also show important underlying calculations used to determine the results in various columns.

34 Worksheets: Overview and Basic Configuration Processes for Key Columns and Actions

Overview of Task Worksheets in Workforce Compensation Plans

Compensation administrators optimize compensation budgets and allocations across their client groups using task worksheets in workforce compensation plans. Managers and specialists also use task worksheets to propose compensation, performance ratings, promotions; to approve proposed changes; and to communicate the changes. You can vary the worksheets that you include in a plan to best support the plan audience in their compensation tasks.

Worksheets consist almost entirely of columns and actions. When you configure the page layout for a task, you enable summary views and columns, detail table columns, and detail table actions.

- Configuration can be straightforward, such as enabling the **Personal** > **Country** column.
- Configuration can involve interdependencies, such as between actions and columns. For example, to let managers rank their people, you need to enable the **Performance** > **Ranking** column in the detail table. You also need to enable the appropriate rank worker actions. And to let managers see full details about someone's ranking, you need to enable the **Right Click Menu** > **View Ranking Details** action.

For all worksheet columns, you can set column properties. The available properties depend on the column.

Type	Examples
General	Column shading, rounding rule, and decimal precision.
Visibility and access	Line managers can only read the column data but compensation administrators read and edit it.
Default value	A specific number or text; or values provided by a specified formula, compensation derived factor, or from a cross-referenced column.
Salary and element mapping	Post a single payment or base pay adjustment and select the payroll element to use.
Information	The formula or dynamic column condition used to determine the column amounts or the source of the column data.

For many columns, you can also build dynamic conditions, for example, to ensure that proposed changes don't exceed existing compensation by a specific maximum.

To include data not already available in the provided columns, you can enable and configure miscellaneous rate and user-defined columns. For example, you can use user-defined columns to share external data, such as market data supplied by third parties.

While you can go straight to configuring worksheet columns as part of configuring worksheet displays, it's worth completing other, related configurations first. Here are some examples of configurations with interdependent configuration tasks:

- Include prorated values for relevant worksheet columns by setting up assignment segment options.
- Specify how to determine local currencies for a compensation component, and if the component units should be nonmonetary, such as **Days** or **Shares**.
- Share performance ratings and changes between Oracle Fusion Performance Management Cloud Service and compensation plan worksheets.
- Designate review hierarchies that are separate from the primary manager hierarchy. Also override any global notification settings, as appropriate for the specific plan. For example, you have a global setting for how everyone publishes and withdraws budgets, but want to change the settings for a specific plan.
- Specify how to generate and store statements that managers use to communicate compensation changes to their people.
- Build and enable the alerts that plan worksheets need to include.

You configure plan worksheets using the **Workforce Compensation Plans** task, **Worksheets** task list in the **My Client Groups** > **Compensation** work area. The other topics in this chapter have the basic processes to fully configure alerts, compensation change statement, compensation component, and performance rating columns. It also has basic processes to fully configure worksheet models and filters for worksheets and reports. The following chapters have information about each task in the **Worksheets** task list.

Reference

For descriptions of every worksheet column and action, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). To help you locate columns and actions, the document tabs organize information in the same groupings as the Configure Worksheet Page Layout pages.

For columns, the document has this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets

For actions, it tells you about any dependent configurations you need to complete.

Related Topics

- Overview of Worksheet Display in Workforce Compensation Plans
- Miscellaneous Rate Component Columns and User-Defined Columns
- Performance Considerations for Workforce Compensation Plans
- Overview of Workforce Compensation Plan Configuration

Include Alerts in Task Worksheets

Here's the basic process to include alerts in the task worksheets of a workforce compensation plan:

1. Enable predefined alerts as well as create and enable your own alerts using the **Configure Alerts** task. All of the enabled alerts for the plan appear in the enabled **Alert** column of every enabled worksheet when the alert

conditions are met. You can't enable different alerts for different worksheets. You can elect to not complete step 3 for various worksheets.

2. Enable the task worksheet using the **Configure Worksheet Display** task.
3. Enable Alerts column in the Alerts column group of the detail table using the Configure Task Layout icon.

Related Topics

- Overview of Alerts in Workforce Compensation Plan Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Overview of Worksheet Display in Workforce Compensation Plans

Include a Budget Group in a Compensation Task Worksheet Summary

Here's the basic process to include a budget group in the summary of a compensation task worksheet, in a workforce compensation plan:

1. Enable a compensation task worksheet using the **Configure Worksheet Display** task.
2. Complete these steps using the **Configure Task Layout** icon.

    a. On the Summary tab, enable the group view. Optionally change the Group column display name to reflect the grouping criteria, such as **Location** or **Grade** and **Country**.

       If you enable the analytic view, you can also enable group view for that summary information.

    b. On the Detail Table tab, enable the column you want to use as a group, such as **Personal** > **Country** or **Employment** > **Location** . To reference data not in the available columns through a fast formula or dynamic calculation, you can enable and configure a user-defined text column. For example, to use a formula to prevent managers from crossing budget limits or to track budgets by both **Grade** and **Country** columns.

       You can't use these kinds of columns for grouping: person number, email, worker number or name, date, updated by, performance management rating, or numeric.

       Grouping columns show only the first 150 characters of text.

3. Create the budget pool or edit an existing pool using the **Configure Budget Pools** task.

    a. Enable worker-level budgeting.
    b. Set the applicable column as the grouping column.
    c. Optionally enforce budgets by grouping column and set a maximum percentage over allocation. You can also set the severity when people go over budget, such as **Error** or **Warning**.

Related Topics

- Configure the Summary Display for Compensation Task Worksheets
- Detail Table Configuration in Budget Display
- Guidelines to Configure the Budget Amount - Worker Component Columns
- Miscellaneous Rate Component Columns and User-Defined Columns

Include Compensation Change Statements in Task Worksheets

Here's the basic process to include compensation change statements in the communication task worksheets of a workforce compensation plan:

1. Configure what changes you want managers to communicate and how they communicate the changes using the **Configure Compensation Change Statements** task.
2. Enable a communications task worksheet using the **Configure Worksheet Display** task.
3. Enable the applicable summary columns and the applicable actions using the **Configure Task Layout** icon.

Related Topics

- Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Overview of Worksheet Display in Workforce Compensation Plans

Include Compensation Component Columns in Task Worksheets

Here's the basic process to include compensation component columns in the worksheet summary views and detail tables of a workforce compensation plan:

1. Configure up to five compensation components using the **Configure Compensation Components** task.
2. Enable a task worksheet using the **Configure Worksheet Display** task.
3. Complete these steps using the **Configure Task Layout** icon:
    a. Enable the components to include in summary views, the relevant summary views, and the applicable component columns.
    b. Enable applicable columns in the component column groups of the detail table.

    To post the approved plan changes as salary updates or element entries, be sure to enable the **Compensation Amount** column for at least one component. You also need to set the salary and element mapping properties for the column.

Related Topics

- Compensation Components in Workforce Compensation Plan Worksheets
- Configure the Summary Display for Compensation Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Guidelines to Allocate Compensation as Percentage of Budget
- Guidelines to Configure the Budget Amount - Worker Component Columns

Include Filters in Task Worksheets and Plan Reports

Here's the basic process to include filters in the task worksheets and reports of a workforce compensation plan:

1. Enable a task worksheet using the **Configure Worksheet Display** task.
2. Enable the corresponding detail table columns. For example, you want to let people filter by country and job. You need to enable the **Country** column in the **Personal** group and the **Job** column in the **Employment** group.
3. Enable the **Filters** action using the **Configure Task Layout** icon.
4. Enable the appropriate filters using the **Configure Filters** task. All of the filters that you enable for the plan appear on the worksheet and report Filters dialog box. You can't enable different filters for different worksheets and reports in the same plan. You can elect to not complete step 2 for various worksheets.

Related Topics

- Overview of Filters in Workforce Compensation Plan Worksheets and Reports
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Overview of Worksheet Display in Workforce Compensation Plans

Include Models in Task Worksheets

Here's the basic process to include models in the task worksheets and reports of a workforce compensation plan:

1. Enable a task worksheet using the **Configure Worksheet Display** task.
2. Enable **Models** actions, such as **Model - Create Model**, **Model - Open Model**, and **Model - Apply Model**, using the **Configure Task Layout** icon.
3. Enable model access, sharing restrictions, usage, and allocation methods using the **Configure Models** task. All of the settings that you enable appear on the worksheet and report Filters dialog box. You can't enable different filters for different worksheets and reports in the same plan. You can elect to not complete step 2 for various worksheets.
4. Enable the modeling criteria you want to let people select from, such as **Country** and **Job** using the **Configure Report Dimensions and Modeling Criteria** task. You can use delivered dimensions and define your own dimensions using delivered job attributes, grade attributes, user-defined worksheet columns, and compensation attributes.

Related Topics

- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Overview of Modeling in Workforce Compensation Plan Worksheets
- Dimensions and Range Increments in Worksheet Models and Plan Reports
- Overview of Worksheet Display in Workforce Compensation Plans

Include Performance Rating Columns in Task Worksheets

Here's the basic process to include performance columns in task worksheets of a workforce compensation plan:

1. Optionally configure performance management ratings, compensation performance ratings, or both using the **Configure Performance Ratings** task.
2. Enable a task worksheet, ideally of type **Performance** using the **Configure Worksheet Display** task.
3. Complete these steps using the **Configure Task Layout** icon:

    a. Enable a task worksheet, ideally of type **Performance**. Optionally enable the **Performance Rating** summary column of the performance task worksheet.
    b. Enable at least one performance management rating or compensation rating column in the detail table. These columns are in the **Performance** column group.

Related Topics

- Overview of Performance Ratings in Workforce Compensation Plan Worksheets
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets

Notify People of Eligibility Changes, Reassignments, and Delegation Changes in a Workforce Compensation Plan

Here's the basic process to notify plan managers and other reviewers of individuals' eligibility changes, reassignments, and delegation changes in a workforce compensation plan. The initial, saved changes appear as alerts in the relevant worksheets. When the changes are approved, the managers and reviewers get FYI notifications.

1. In each of the enabled task worksheets, enable these actions using the **Configure Worksheet Display** task:
    - Request eligibility change
    - Reassign workers to another manager
    - Manage delegations
2. Select **Approval required** for these notification settings using the **Configure Global Setting** task:
    - Eligibility Changes
    - Worker Reassignments
    - Delegate Worker
    - Remove Worker Delegation

Related Topics

- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Global Setting Options for Workforce Compensation Plan Notifications
- How Workforce Compensation Plan Notifications Work
- Header and Message Text for All Workforce Compensation Plan Notifications

35 Worksheets: Compensation Component

Compensation Components in Workforce Compensation Plan Worksheets

Compensation components are the building blocks of workforce compensation plans. You can handle all types of allocation, such as merit increases, bonus awards, and stock grants by configuring up to five separate components. For example, you create one monetary component for merit increases, another monetary component for bonus awards, and a nonmonetary component for stock grants.

While you can go straight to configuring component columns as part of configuring worksheet displays, it's worth configuring the necessary compensation components first. Here's what you can do when you configure compensation components that you can't do when you configure worksheet displays.

- Specify how to determine local currency, which is especially important if you enabled currency switching in the plan currency configuration. For example, you want to use the currencies from input values of payroll elements or from salary bases.
- Set nonmonetary the unit of measure for the component, such as **Days**, **Hours**, **Shares**, or **Units**.
- Link budget pools to manager allocations to align the allocations with organizational policies.
- Include prorated values for the relevant worksheet columns by setting up assignment segment options.

> **Tip:** You need to configure assignment segments first, using the **Configure Assignment Segments** task, before you can link them to a component.

The component columns that you enable in task worksheets inherit these compensation component settings.

Related Topics

- Compensation Component Number and Name, and Detail Table of Worksheet Display
- Include Compensation Component Columns in Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets

Compensation Component Number and Name, and Detail Table of Worksheet Display

When you configure a compensation component, you select the component number and enter a name. The number and name let you identify the corresponding component columns on the Detail Table tab when you configure the worksheet display for a task.

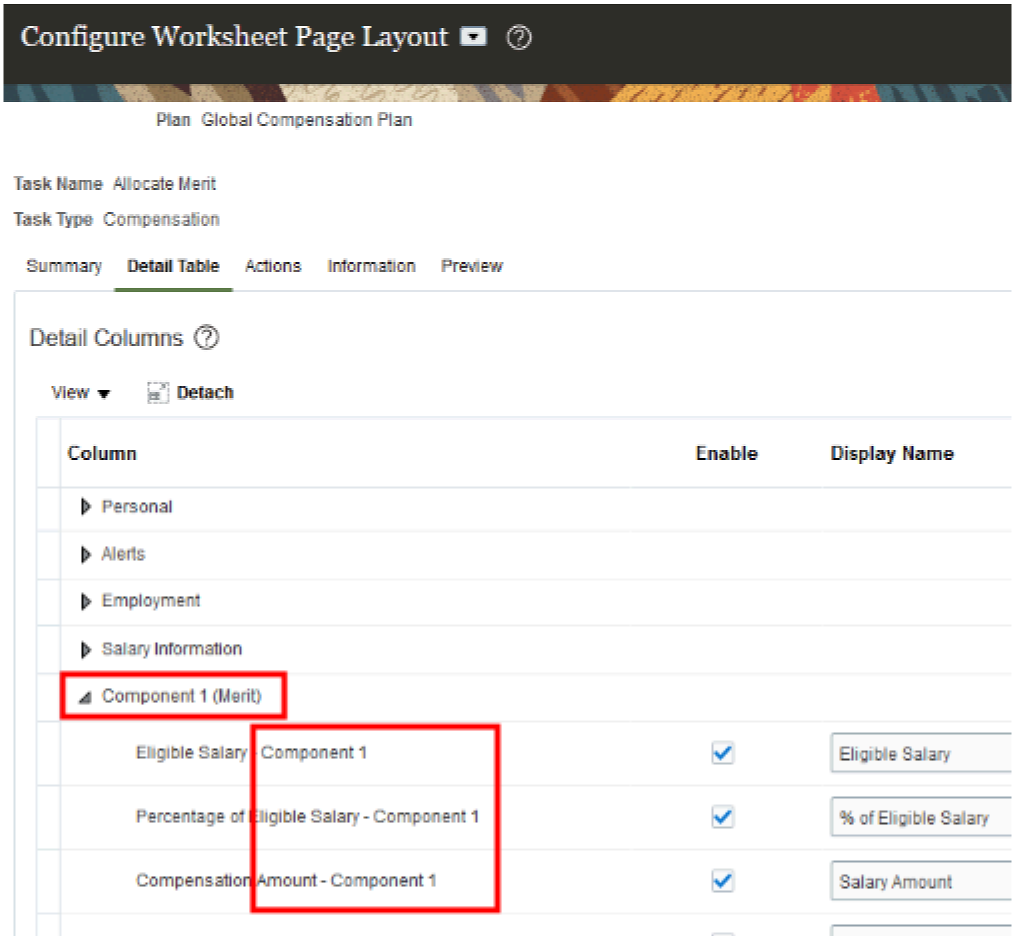
For example, you configure these compensation components:

Name	Component Number
Bonus	2
Merit	1

On the Detail Table tab, the appropriate column group name has the component name appended, such as **Component 1 (Merit)** and **Component 2 (Bonus)**. And the names of the individual columns in a component group all end with the component number. This suffix lets you know which compensation component you're configuring. The suffix is especially important when you scroll down enough that you can't see the column group name anymore. Here are some examples of monetary component column names:

Component 1 (Merit) Column	Component 2 (Bonus) Column
Eligible Salary - Component 1	Eligible Salary - Component 2
Percentage of Eligible Salary - Component 1	Percentage of Eligible Salary - Component 2
Compensation Amount - Component 1	Compensation Amount - Component 2

Here's an example Detail Table tab showing these same column group name and individual column names for compensation component 1.



Related Topics

- Include Compensation Component Columns in Task Worksheets

How the Compensation Component Display Order Affects Task Worksheets and Administrator Reports

You can specify the order that compensation components show in the summary areas of task worksheets. It also determines their order in the **Component** choice list on administration reports. Do this by setting the display order when you configure the compensation component. In summary views other than the table view, managers can use the **X of Y** link and **Previous** and **Next** icons to move between components. For example, in the score board or analytic summary view of the **Reward** compensation worksheet, a manager clicks the **1 of 3** link.

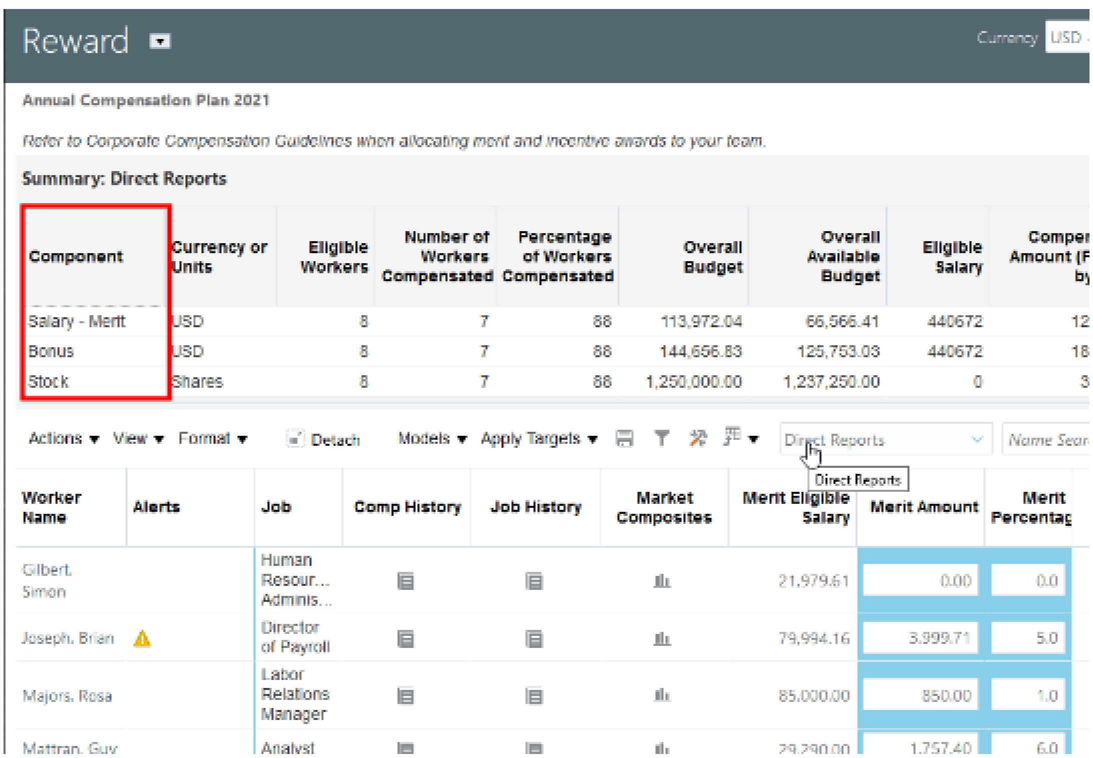
You set the display order when you configure the compensation component. The display order can mirror the component number, but it can also be different. Here's an example of when they match:

Name	Component Number	Display Order
Bonus	2	2
Salary - Merit	3	3
Stock	1	1

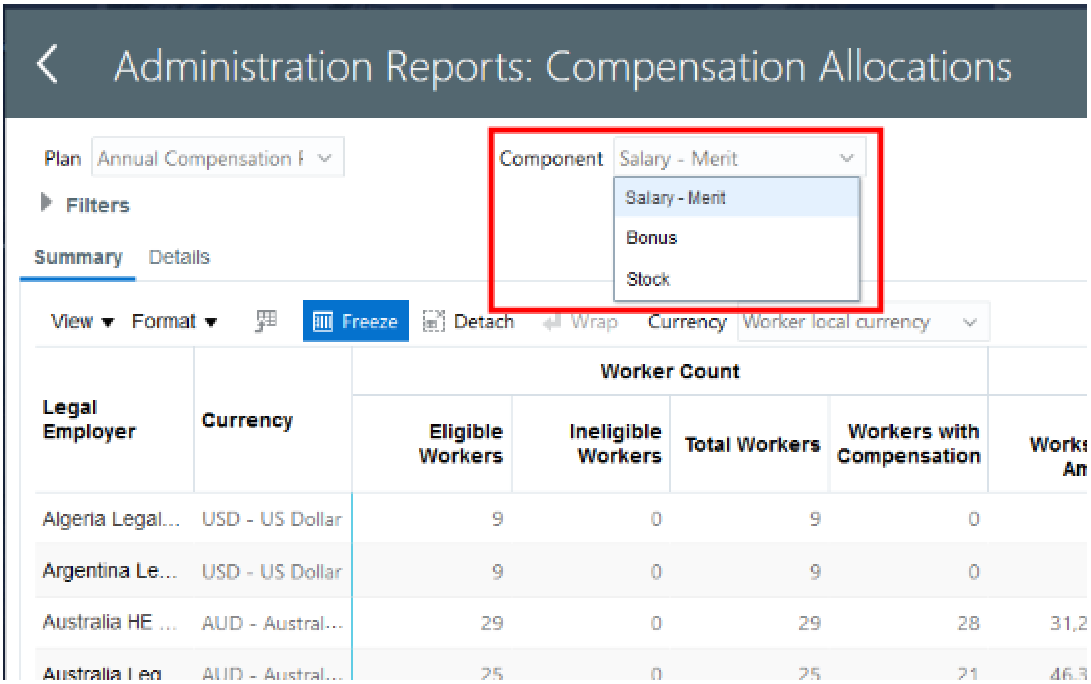
And here's an example of how they can be different:

Name	Component Number	Display Order
Bonus	3	2
Salary - Merit	2	1
Stock	1	3

Here's an example of what managers see in the summary table view of a compensation task worksheet:



Here's an example of the **Component** choice list on the **Compensation Allocations** administration report:



Local Currency Determination for Compensation Components

When you configure a compensation component, you need to specify how the component determines local currency. Here's the local currency source for each available option:

Option	Source of the Local Currency	Usage Example
Corporate	The configured plan currency	Monetary changes are all in the corporate currency
Element Input	The input currency for the payroll element mapped to the Component Amount column of the compensation component, such as **Compensation Amount - Component 1**	Bonuses
Legal Employer	The currency defined for the individual's legal employer	Salary adjustments, such as merit or cost of living increase, when the currency of the legal employer is different from the salary basis currency
Salary Basis	The input currency for the payroll element of the salary basis linked to the individual's employment record	Salary adjustments, such as merit or cost of living increase

Option	Source of the Local Currency	Usage Example
Formula	The currency retrieved by the specified formula from some other source	When none of the other options fit your business requirements

Tip: To prevent data corruption, you can't change the **Local Currency Determination** selection after you run the **Start Workforce Compensation Cycle** process. You have to set all plan cycles to **Closed** or run the **Back Out Workforce Compensation Data** process. Then change the local currency determination and run the **Start Workforce Compensation Cycle** process again.

Related Topics

- Workforce Compensation Plan Currency
- Element Mapping Properties of Compensation Amount Columns
- Back Out and Purge Workforce Compensation Data Processes
- Formula Type for Compensation Currency Selection
- Overview of Using Fast Formulas

Nonmonetary Units for Compensation Components

By default, the units of measure for the amount columns of the compensation component are monetary. You can specify that the columns use a nonmonetary unit for amounts when you configure the compensation component. For example, you can select **Days**, **Items**, **Shares**, or **Units**. To measure amounts in monetary units, leave **Nonmonetary Units** blank.

Budget Pools and Compensation Components

To align a compensation component with organizational strategies and policies, you can select a budget pool. You can even select the same budget pool for multiple compensation components. For example, your plan includes the **Merit**, **Bonus**, and **Market Adjustment** compensation components. And you configure all of t with the **Monetary Allocation** budget pool.

For budget values to increase and decrease according to managers' allocations, you need to link the budget pool to a compensation component. Any budget pool that you create for the plan and don't link to a compensation component just shows static budgetary information.

Primary Component for Budgeting

When you have multiple components with the same budget pool, you need to select **Primary component for budgeting** for one of the components. The salaries of the people who are eligible for the primary component determine the total eligible salaries used for their managers' budgeting.

For example, of the three configured components, you make **Merit** the primary budgeting component. The total eligible salaries for managers' budgeting include the salaries of their people who're eligible for **Merit**. The totals exclude their people who are eligible for **Bonus**, **Market Adjustment**, or both, but aren't eligible for **Merit**.

Related Topics

- Overview of Budget Pools in Workforce Compensation Plans

How You Let Managers Track Off-Cycle and On-Cycle Compensation Against a Budget

Here's how you can enable managers to track off-cycle and on-cycle awards when they review their budget pool.

1. Create the workforce compensation plan using the **Workforce Compensation Plans** task in the Compensation work area.
    a. Configure the plan details.
    b. Configure the budget pool.
    c. Create at least one worksheet compensation component and associate the budget pool with it.
    d. Run the **Start Compensation Cycle** process.
2. After you start the compensation cycle, associate the budget pool with an individual compensation plan option. Use the **Individual Compensation Plans** task in the Compensation work area. Select the budget pool when you add or edit the relevant plan option.

Configure Assignment Segments Options of a Compensation Component

You can include prorated values for relevant component worksheet columns. Do this by setting up assignment segment options for only one of the compensation components configured for the compensation cycle. Don't enable assignment segments for a component that you're mapping to salary rates.

1. On the create or edit component dialog box for the appropriate compensation component, select **Component for assignment segments**. For example, you want to prorate bonus allocations, so you enable the **Bonus** compensation component for assignment segments.
2. Select an amount column for assignment segments, either the **Compensation Amount** column or a miscellaneous rate column for the component. This selection lets you feed the assignment segment total to a column that managers see in their summaries.

    The amount could have additional calculations done on it before it's passed to payroll element entries. For example, you select a miscellaneous rate column for the assignment segment. The value in that rate column could be part of a dynamic calculation configured on the compensation amount column. The calculation could increase or decrease the rate column value further.

> **CAUTION:** Don't select a column that you're configuring with a dynamic calculation or a default value. Specifying the column as an assignment segment takes precedent over any other configurations for that column, and the other configurations are ignored.

The selected column shows as read-only in any task worksheets with the column enabled. If you select the compensation amount column, these columns are also read-only in any worksheet where you enable them:

   - Percentage of Eligible Salary
   - Percentage of Budget Pool

3. Specify whether to publish the total segments amount to the selected amount column by default when you run the **Start Workforce Compensation Cycle** process.

Related Topics

- Overview of Assignment Segments in Workforce Compensation Plan Worksheets
- Basic Process to Configure Worksheet Assignment Segments

Eligibility Profiles of Compensation Components

As part of the foundation configuration tasks, you configure plan eligibility to identify the people who are eligible and ineligible for the plan. You can also add eligibility profiles to compensation components to determine who is eligible and ineligible for the components. The component-level eligibility considers only the people whose status the plan-level eligibility configuration set to **Eligible**. It ignores everyone whose plan-level status is **Ineligible** or **Limited**.

Assignment Segments

If you enable the **Component for Assignment Segments** option, the component eligibility also determines segment eligibility. Managers can update compensation values for only people who're eligible for a segment. They can only read the segment values in these situations:

- Their people are ineligible for the segment.
- The person's assignment is processed or partially processed.
- The manager has read-only access to the worksheet.

Administrators can see all assignment segment columns, update all segment values, and update any segment eligibility using the **Administer Workers** task. You can also change segment eligibility by changing the external data and then running the **Refresh Workforce Compensation Data** process.

Related Topics

- Workforce Compensation Plan Eligibility
- How Required and Optional Profiles Determine Compensation Eligibility
- Configure User-Defined Columns of a Workforce Compensation Plan Worksheet to Show External Data

Eligibility Profile Testing for a Compensation Component

You can test how long it takes to evaluate the eligibility profiles in compensation component configurations and view test results. The test lets you select a cycle, a sample person, and an active assignment for your test. Data security applies, so the person and assignment you can see for the cycle depend on your privileges. If profile criteria includes fast formula, you can see if it worked correctly by reviewing the formula logs. Data security applies, so the person and assignment you can see for the cycle depend on your privileges.

Reference

Formula Type Is Compensation Currency Selection

To determine the local currency for a workforce compensation component, you can create formulas using the **Compensation Currency Selection** formula type.

Here's a comprehensive list of the contexts available to this type of formula:

- DATE_EARNED
- EFFECTIVE_DATE
- END_DATE
- START_DATE
- HR_ASSIGNMENT_ID
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID
- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_CURR_CODE	Char	N	Currency code from the formula

This sample formula determines the currency for a plan based on the component ID.

```
/******************************************************************
FORMULA NAME : Compensation Currency Selection Formula
FORMULA TYPE : Compensation Currency Selection
DESCRIPTION: It returns the currency code based on component_id.
*******************************************************************/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number),
 CMP_IV_COMPONENT_ID (number)
```

```
/*=========== INPUT VALUES DEFAULTS ENDS======================*/

/*================= FORMULA SECTION BEGIN =======================*/
DEFAULT FOR CMP_IV_COMPONENT_ID IS 0
l_curr_code = 'XXX'
IF (CMP_IV_COMPONENT_ID = 489) THEN
(
l_curr_code = 'USD'
)
ELSE IF (CMP_IV_COMPONENT_ID = 490THEN
(
l_curr_code = 'GBP'
)
RETURN l_curr_code
/*================= FORMULA SECTION END ======================*/
```

Related Topics

- Formula Compilation Errors
- Formula Execution Errors
- When do I run the Compile Formula process
- Example of Writing a Fast Formula Using Formula Text

36 Worksheets: Performance Ratings

Overview of Performance Ratings in Workforce Compensation Plan Worksheets

While you can go straight to configuring performance rating columns as part of configuring worksheet displays, it's worth configuring performance ratings first. Here's why:

- You can include development and performance goal ratings from Oracle Fusion Performance Management Cloud Service in your task worksheets. And these ratings get updated automatically when managers save their rating changes in their worksheets during the workforce compensation cycle.
- You can share compensation performance ratings among plan managers and optionally specify the rating model for them to use. For example, select a model that indicates level of interest, level of performance, or proficiency in competencies.

You can also use both integrated Performance Management ratings and compensation performance ratings. For example, your managers used Performance Management to rate their people several months before the compensation cycle started. Now you want the managers to make sure that their people's current and past performance is meeting expectations.

Related Topics

- Plan Cycle Dates
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets

Performance Management Ratings in Workforce Compensation Plan Worksheets

You can share development and performance ratings and documents from Oracle Fusion Performance Management Cloud Service with managers in task worksheets for workforce compensation plans. These ratings update automatically when managers save their rating changes in their plan worksheets. Managers can even set ratings for the first time in a task worksheet as long as the performance document exists in Performance Management.

You can enable this integration when you configure performance ratings and later, when you enable development and performance rating columns when you configure worksheet displays.

Test Performance Document

You can test your performance document and rating data on the same configuration page. You don't have to wait until you start a workforce compensation cycle for the plan.

Related Topics

- Workforce Compensation Plan Cycle Dates
- Include Performance Rating Columns in Task Worksheets
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets

Reasons to Set Performance Document Properties

By default, managers see the most recent manager-submitted ratings and corresponding performance documents, if they exist, when they open the relevant task worksheet.

If your managers can have many people reporting to them, the default behavior can significantly affect their worksheet performance. And depending on how regularly people use Performance Management, people's most recent ratings and documents could be from years ago. Managers won't see this in the rating columns, but they can see it in the performance document. Thus, you may want managers to consider specific ratings and performance documents when proposing changes for the workforce compensation plan.

You can override the default behavior by setting performance document properties when you configure performance ratings that integrate with Oracle Fusion Performance Management Cloud Service.

Related Topics

- Plan Cycle Dates

How the Performance Template Selection Affects Other Document Properties

You can set performance document properties when you configure performance ratings that integrate with Oracle Fusion Performance Management Cloud Service. A key property is the performance template selection.

Template and Document Type

You can show specific kinds of ratings by selecting a performance template, such as **Competency Progress** or **Annual 360 Evaluation with Development Goals**. If the template has a corresponding document type, selecting the template also sets the performance document type. For example, you select **Annual 360 Evaluation with Development Goals**, which sets the performance document type to **Annual Evaluation**.

Template and Timing Options

You can show only ratings and documents for a specific template and period. When you select a performance template, you make the **Timing** options available, including **Period Specific**. Selecting **Period Specific** makes the **Period Name** choice list available so you can select the appropriate period. These choice list values change depending on your template selection.

If a person doesn't have any ratings or document for that period, the relevant columns in the worksheet are empty.

Timing Period Name and Review Period

The template **Period Name** choice list values also change if you set a review period. If you want to use a review period and a specific template period, set the review period before you set the period name. Setting the review period after the period name also removes the period name and you need to set the name again. This removal happens even if the period name you selected would be the only choice list value if you set the review period first.

Related Topics

- Plan Cycle Dates
- How Performance Document Components Work Together

Compensation Performance Ratings in Workforce Compensation Plan Worksheets

You can let managers share the performance ratings that don't transfer to Oracle Fusion Performance Management Cloud Service or HR. They share their ratings in task worksheets across the primary, secondary, and reviewer plan hierarchies as they allocate workforce compensation during the current compensation cycle.

You can enable compensation ratings when you configure performance ratings. Then you specify whether managers rate people using a choice list or stars. You determine the scale used for the choice list or stars with the rating model that you select. You can also create a rating model, as needed.

Related Topics

- Include Performance Rating Columns in Task Worksheets
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Rating Models

37 Worksheets: Approvals and Notifications

Configure Approvals for Workforce Compensation Plan Worksheets

By default, managers allocating compensation with a workforce compensation plan can submit their changes to the plan at any time. And managers higher in the primary plan hierarchy can approve their subordinate managers' plan changes at any time. You can change the plan approval and submission modes when you configure approvals. You can also identify an alternate approval hierarchy to use instead of the primary plan hierarchy.

Related Topics

- Workforce Compensation Plan Hierarchies
- Options to Configure Workforce Compensation Plan Hierarchies
- Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets
- How You Let Managers Track Off-Cycle and On-Cycle Compensation Against a Budget

Approval Modes in Worksheet Approvals Configuration

You specify when managers can approve their subordinate managers' plan changes with the **Approval Mode** option you select when you configure approvals.

Mode	Description
You specify when managers can approve their subordinate managers' plan changes with the Approval Mode option you select when you configure approvals.	Let subordinate managers complete their allocations before higher-level managers can approve subordinate changes because their approvals make the plan unavailable to their subordinate managers.
Approve anytime (default selection)	Higher-level managers can approve their subordinate managers' plan changes at any time during the period the plan is available to the higher-level managers.
Disable approvals	Approvals aren't required and higher-level managers don't have the **Approve** and **Return for Correction** actions available to them.

You can change the approval mode after the **Start Workforce Compensation Cycle** process runs using the **Active Plans** task.

Submit Modes in Worksheet Approval Configuration

You specify when managers can submit their plan changes with the **Submit Mode** option you select when you configure approvals.

Mode	Description
All managers must be approved	Starting at the lowest tier of the hierarchy, managers need to review and approve plan changes submitted by their direct reports. Then the current tier of managers can submit their own plan changes for approval.
Submit anytime (default selection)	Managers can submit their plan changes at any time during the period the plan is available to them.
Disable submit	Managers can only save their plan changes. The **Submit** action isn't available for the plan.

Alternate Approver Table in Worksheet Approval Configuration

By default, the approval hierarchy for a workforce compensation plan is the primary plan hierarchy. To have people other than primary plan managers handle approvals, select an alternate approver table when you configure approvals for worksheets. Typically, you use alternate approver hierarchies when you transition approval control from managers to the HR department.

You can set an alternate approver for a specified worksheet manager when you create the alternate approver table. The worksheet manager options come from the primary plan hierarchy. The alternate approver that you select replaces the person who would otherwise approve plan changes submitted by the specified worksheet manager. The alternate approver doesn't replace the specified worksheet manager in the approval hierarchy. Thus the alternate doesn't approve plan changes that the specified worksheet manager normally approves.

Each alternate approver approves plan changes according to their approval sequence. The person with the lowest approval sequence approves first and the person with the highest sequence approves last.

> **Tip:** If you add or delete alternate approvers in a table, you need to run the **Refresh Workforce Compensation Data** process afterward. You don't need to run the process if you only change the approval sequence of existing alternate approvers.

Related Topics

- Workforce Compensation Plan Hierarchies
- Options to Configure Workforce Compensation Plan Hierarchies
- Alternate Approver for Workforce Compensation Plan Changes Is the Final Approver
- Alternate Approver for Workforce Compensation Plan Changes Precedes the Final Approver
- Alternate Approver for Workforce Compensation Plan Changes Is in the Middle of the Primary Plan Hierarchy

Configure Notifications for Workforce Compensation Plan Worksheets

You can configure notification settings that apply across all workforce compensation plans, such as **Notify**, **Disable**, or **Prompt Manager**, using the **Configure Global Settings** task. For example, notify managers when their budgets are published or withdrawn and prompt managers when approvers return their plan changes for corrections. When at least some or even all of these global settings aren't appropriate for a specific plan, you can override these global settings. Configure plan-specific notification settings, when you configure approvals and notifications for task worksheets in workforce compensation plans.

Related Topics

- Notifications in Workforce Compensation

FAQ

Can I configure workflow in workforce compensation to route plan changes for approval?

No. Workforce compensation uses the primary plan hierarchy to route approvals to the highest-level manager. While you can't create your own approval routes, you can create alternate approvers for individual managers using the **Configure Approvals and Notifications** task.

Related Topics

38 Worksheets: Examples of Alternate Approver Configurations

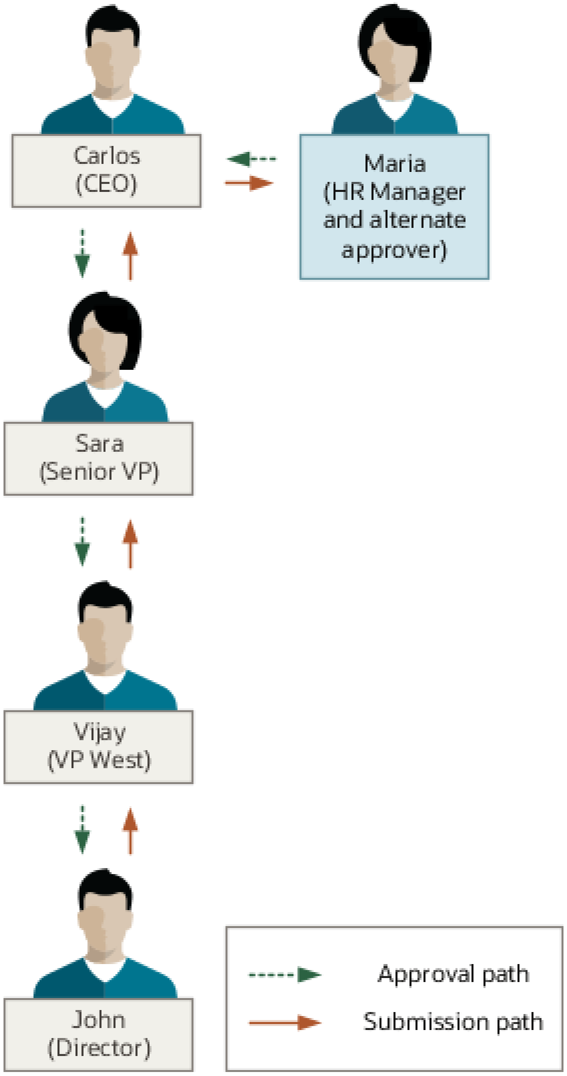
Alternate Approver for Workforce Compensation Plan Changes Is the Final Approver

Carlos, the CEO, is the top manager in the primary plan hierarchy. Company policy is that his plan changes go to a designated HR manager for final review and approval. Here's how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
Carlos	1	Maria

And here's an example of how plan change submissions are approved using the primary plan hierarchy and this alternate approver table.

1. John, a director, submits his plan changes to Vijay, VP West, for approval.
2. Vijay reviews and approves John's changes, then makes his own plan changes and submits them to Sara, a senior VP.
3. Sara reviews and approves Vijay's plan changes, then makes her own plan changes and submits them.
4. Carlos, the CEO, reviews and approves Sara's plan changes, then makes his own plan changes and submits them. At this point, the plan status for Carlos is **In Approvals**.
5. Maria, an HR manager, reviews Carlos's plan changes. When she approves the changes, Carlos's plan status becomes fully approved.



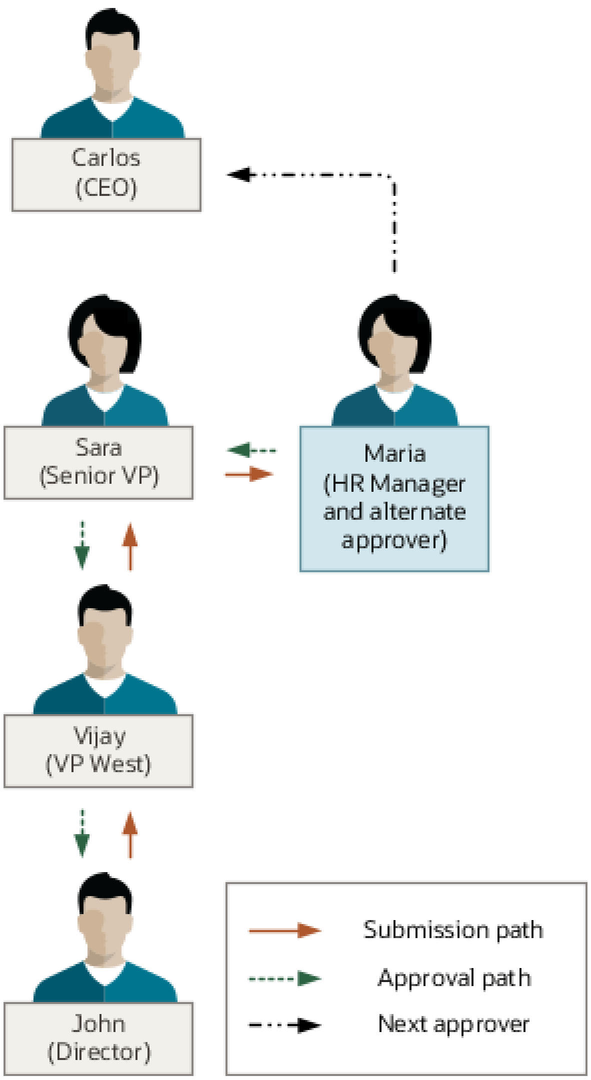
Alternate Approver for Workforce Compensation Plan Changes Precedes the Final Approver

Carlos is the CEO and top manager in the primary plan hierarchy. He doesn't participate in the approval process for workforce compensation changes from his subordinate managers under Sara, a senior VP. Carlos gets an informational notification when Sara submits her plan changes, but Maria, a manager in HR, has final approval. Here's how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
Sara	1	Maria

And here's an example of how plan change submissions are approved using the primary plan hierarchy and this alternate approver table.

1. John, a director, submits his plan changes to Vijay, VP West, for approval.
2. Vijay reviews and approves John's changes, then makes his own plan changes and submits them to Sara, a senior VP.
3. Sara reviews and approves Vijay's plan changes, then makes her own plan changes and submits them.
4. Carlos, as Sara's normal approver, gets an informational notification that Sara submitted her plan changes. Maria is the HR manager who's Sara's alternate approver. She gets the approval notification and reviews Sara's plan changes. When Maria approves them, the plan status for Sara and all of her subordinate managers is **In Approval**.
5. When Carlos checks his approvals task worksheet a few days after getting Sara's submission notification, he sees that Maria approved Sara's plan changes. If Sara is eligible, Carlos can change her allocations.
6. After Carlos saves his plan changes, he reviews and approves all of his plan changes and the plan changes that Maria approved. His approval makes the plan fully approved.



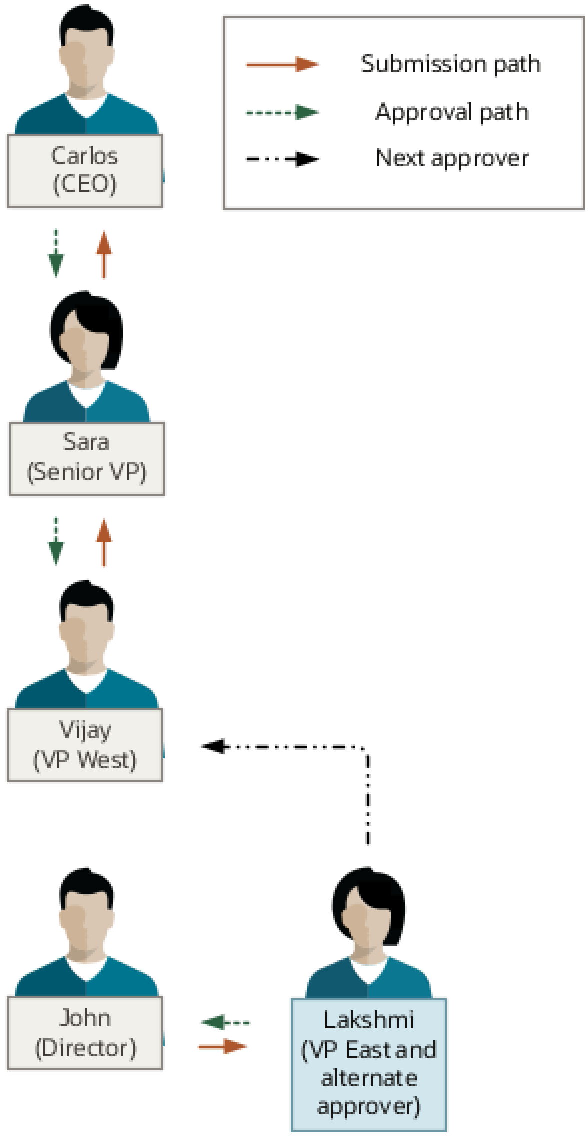
Alternate Approver for Workforce Compensation Plan Changes Is in the Middle of the Primary Plan Hierarchy

John, a director, reports to Vijay, VP West, according to the primary plan hierarchy. But, John's entire team did a special project for Lakshmi during most of the past year. Sara, the senior VP whom Vijay reports to, wants Lakshmi to review and approve the compensation for John's team rather than Vijay. Here's how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
John	1	Lakshmi

And here's an example of how plan change submissions are approved using the primary plan hierarchy and this alternate approver table.

1. John, a director, submits his plan changes.
2. Vijay, as John's normal approver, gets an informational notification that John submitted his plan changes. Lakshmi, VP East and the alternate approver, gets an approval notification that she uses to approve or reject John's plan changes. She can open the Workforce Compensation work area from the notification. At the top of the page, she can select John from the manager list and review his worksheet details for the plan. But, she can't approve or reject John's plan changes in the work area. She approves or rejects John's plan changes using actions in the approval notification.
3. When Vijay checks his approvals task worksheet a few days after getting John's submission notification, he sees that Lakshmi approved John's plan changes. In the detail table, the status for John's changes is **In Approvals**.
4. Vijay can now make and submit his own plan changes to progress the plan through the approval process. Vijay, Sara, and Carlos, the CEO whom Sara reports to, can still make plan changes for John's team even after Lakshmi approves John's changes.


Submission path
Approval path
Next approver
Carlos
(CEO)
Sara
(Senior VP)
Vijay
(VP West)
John
(Director)
Lakshmi
(VP East and
alternate
approver)

39 Worksheets: Compensation Change Statements

Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets

You can let managers and HR specialists communicate compensation and performance rating changes to people as part of a workforce compensation cycle. They communicate the changes with compensation change statements using the communications-type task worksheet. They can also use the change statements to communicate promotions done as part of the cycle. The changes that they can communicate, and how they communicate them depends on how you configure compensation change statements.

Related Topics

- Include Compensation Change Statements in Task Worksheets
- Overview of Worksheet Display in Workforce Compensation Plans
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets

Statement Groups, Templates, and Worker Statement Action for Compensation Change Statements

Statement groups are fundamental to compensation change statements. The selected group identifies what templates to use for whom, and what statement action individuals are responsible for. You set up all of these options on the Manage Statement Groups page.

Name

Use a broad, descriptive name so that people understand what to expect from the statement. For example, your latest compensation and performance statement group might be **2021 Compensation and Performance Changes**. And your latest promotions statement group might be **2021 Promotions**.

Templates

When you add a template to the statement group, you can set a display name and add criteria for when to use the template. Typically, you add a separate row for each language that you use to communicate changes. Here are some examples for compensation and performance changes:

Template	Display Name	Criteria
Compensation and Performance Change Statement.rtf	English Compensation and Performance Change Statement	Country = US or UK or Canada

Template	Display Name	Criteria
Cambios en Compensación y Rendimiento en 2021.rtf	Spanish Compensation and Performance Change Statement	Country = Spain or Mexico or Costa Rica

Here are some examples for promotions:

- If you use the same template for the entire company, you might have something similar to the first row.
- If you have templates in different languages, you might have something similar to the second row.

Template	Display Name	Criteria
Promotion.rtf	Promotion Statement	Country = US or UK or Canada
Promotion.rtf	English Promotion Statement	Country = US or UK or Canada and Proposed Grade Is not blank

To create and load other templates for selection, you can use the Manage Templates page. This page also has sample files to help you create your own templates:

- A list of all the attributes you can include in your own templates.
- Sample compensation change and salary change analytic templates that you can download and tailor for your change communications. Be sure to change the file name before you upload your template.

Worker Statement Action

When you want a record that individuals received their change statements, you can set a worker statement action for the template. For example, you want individuals to acknowledge or sign electronically when they received a statement.

Statement Generation Timing and Output Format for Compensation Change Statements

You can specify when individuals can get their compensation change statements, according to your organizational policies. For example, anyone can get their statement at any time. Or only people whose changes were posted to HR, or have final approval can get their statements.

You can also specify whether to generate the statements as .pdf or .rtf files.

Delivery Options for Compensation Change Statements

You can specify how to generate and deliver worker statements when you configure compensation change statements. The delivery option applies for primary plan managers. Administrators using the **My Client Groups** > **Compensation** > **Administer Workers** task can manage change statements for the plan regardless of how they're generated or delivered.

Printed and Delivered by Managers

Let managers generate the statements using the communication task worksheet in the plan. The statements are automatically available to managers or administrators, but not individuals. You can let managers generate statements at the same time for specific people, all of their direct reports, or all of their subordinates.

When managers use the management hierarchy option, they can also generate statements for their people in a specified country. The process generates the statements in a single file. If a manager decides to provide individual statements to people and the file contains multiple statements, they need to split the file into separate statements. Then they can provide a copy of each statement to the appropriate individual. Their people can see only the statements that the manager provides to them, as long as they keep the statements.

Centrally Managed and Stored

Let managers generate an individual compensation change statement for each of their people and provide them a copy. Also let their people access the centrally stored statements from their compensation pages unless processing made the statements visible to only administrators and managers. Again depending on the process configuration, managers can view and print the statements.

Here's the other options you can set if you centrally manage and store statements:

- To let managers control when to release the statements to their people, enable the **Allow staggered release of statements** option. For example, your policy is to have managers meet with their people to discuss their compensation changes before releasing the statements. If individuals have more than one statement available to them, then their manager has to release each statement separately.
- To automatically delete the statements from storage, you can set the **Days Until Expiration** option. For example, your organization has a 90-day retention policy, so you set the expiration to **90**. Individuals can save their statements if they want to access them after 90 days. Administrators can override this expiration as appropriate, using the **Update Expiration** option when they run the **Process Workforce Compensation Change Statement** process.
- To show everyone the same statement name in the plan, you can set a global statement name. For example, the template display names identify the template language, such as **2021 Compensation and Performance Changes Spanish** or **2021 Compensation and Performance Changes French**. Or the names are in that language, for example, **Cambios en Compensación y Rendimiento en 2021** and **Changements en matière de rémunération et performance en 2021**. Or you want everyone to see the same statement name in the corporate language, for example, **2021 Compensation and Performance Changes**.

Compensation administrators configure and run the **Process Workforce Compensation Change Statement** process to generate and store these changes statements. They run the process according to organizational policies, such as at the end of the workforce compensation cycle, when all changes are finished and approved.

FAQ

What's the difference between workforce compensation change statements and total compensation statements?

Workforce compensation statements show recent changes to base and variable pay. They apply to a statement group, which has RTF templates that can include criteria to identify which people get the template. For example, people in Spanish-speaking countries get the Spanish version of the statement. The workforce compensation plan containing the statement configuration determines the statement content. You configure these compensation change statements for a specific plan using the **Workforce Compensation Plans** task in the Compensation work area.

Total compensation statements show base and variable pay, fringe benefits, and perks for a specified period of time, typically a year. These statements are available both online and in PDF format. You configure these statements using the **Total Compensation Statement** tasks in the Compensation work area.

40 Worksheets: Worksheet Display Configurations

Overview of Worksheet Display in Workforce Compensation Plans

You determine the summary and detail information on compensation, performance, promotion, detail table only, approvals, and communication task worksheets when you configure worksheet display. The specific information managers and HR specialists see depends on the task types and the columns that you enable and configure. Some columns are enabled by default. You can deselect any enabled columns that you don't want to appear in a worksheet.

You also determine the actions available on a worksheet, such as letting managers reassign or delegate individuals or request eligibility changes. And you can provide information that applies to the entire worksheet. For example, you let people know about organizational policies that affect compensation allocations, performance ratings, or promotions, and include links to details.

You can configure up to 10 task worksheets for a plan. For managers to access a workforce compensation plan, you need to configure at least 1 task worksheet. To require approvals for plan changes, you also need to enable and configure an approvals task worksheet.

You enable task worksheets using the Configure Worksheet Display task. You configure the layout of each enabled worksheet using the Configure Task Layout icon on the Configure Worksheet Display page.

Reference

For descriptions of every worksheet column and action, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). To help you locate columns and actions, the document tabs organize information in the same groupings as the Configure Worksheet Page Layout pages.

For columns, the document has this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets

For actions, it tells you about any dependent configurations you need to complete.

Related Topics

- Performance Considerations for Workforce Compensation Plans
- Compensation Components in Workforce Compensation Plan Worksheets
- Overview of Performance Ratings in Workforce Compensation Plan Worksheets
- Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets

Configure the Summary Display for Compensation Task Worksheets

You can include key summary information for the compensation component at the top of compensation-type task worksheets. What people see depends on the population that they're viewing in the detail table.

1. Enable Compensation Components

Select the configured compensation components that you want to show summary information for. For example, you're configuring separate task worksheets for your **Merit** and **Bonus** compensation components. In the worksheet display for the **Merit** compensation task, you select the **Merit** compensation component as the summary component. For the **Bonus** compensation task, you select the **Bonus** compensation component.

2. Enable Summary Views

Enable the views that you want to show, such as the scoreboard, table, analytic, or group view, or a combination of views. When you enable multiple views, you need to make one view the default view that people see whenever they first open the task worksheet.

If you're using worker-level budgeting and setting a budget group, enable the group view. Optionally change the **Group** column display name to reflect the grouping criteria, such as **Location** or **Grade** and **Country**. If you enable the analytic view, you can also enable group view for that summary information.

3. Enable the Columns to Show

Enable the columns that you want to show in the summary section. For example, in the scoreboard view, you enable these columns for each enabled compensation component:

- Compensated Workers with %
- Currency or Units
- Eligible Salary
- Allocate with %
- Budget with %
- Remaining Budget with %

For the analytic view, you enable analytics that provide a snapshot of allocations in the current cycle. For example, you enable the **Worker Population**, **Allocation Statistics**, **Allocation Amount**, and **Salary Statistics** analytics.

To show managers and HR specialists the same summary information regardless of any filters they apply to the detail table, enable these three static columns. To show them summary information that changes depending on the filters they apply to the detail table, you can enable three filtered columns.

Static	Filtered
• Overall Budget • Overall Available Budget	• Budget - Filtered by Team (enabled by default) • Available Budget - Filtered by Team

Static	Filtered
• Overall Compensation Amount	• Compensation Amount - Filtered by Team

For example, you enable the **Overall Budget** summary column and leave the **Budget - Filtered by Team** column enabled. A manager changes the **Team** filter on the worksheet to **Direct Reports**. The summary section **Overall Budget** column shows the budget amount for all of the manager's subordinates. The **Budget - Filtered by Team** column shows the budget amount for only their direct reports.

4. Optionally Change Display Names and Default Sequences

You can change the display names and default sequences, as appropriate for the audience. For the analytic view, you can change the title. Certain titles also have subtitles that you can change. For example, you want to make your names more human, so you change **Compensated Workers with %** to **Compensated Individuals with %**. And you change **Worker Population** to **Population**.

5. Optionally Configure Column Properties

You can configure general and information column properties for the scoreboard, table, and group views. For example, you can set a rounding rule and the decimal place to display. The actual properties vary depending on the column.

All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an i in it on the column header. They click the icon or hover over it to see the information.

To show column totals in the summary section, you can select **Show totals** for columns that include the property. You probably don't want to show totals in a worksheet that has compensation components with different units of measure enabled. The totals would be meaningless. For example, one component is in monetary units and another is in shares. The **Compensated Workers with %** column total would combine the numeric monetary and shares values.

6. Check the Configuration

To see the worksheet summary just the way that the plan audience will see it when the plan becomes active, use the Preview tab. You can easily test different summary configurations to find the summary that best conveys the key information the audience needs and wants to see.

Related Topics

- Compensation Components in Workforce Compensation Plan Worksheets

Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets

You can include key summary information at the top of communication, performance, and promotion type worksheets. What people see depends on the population that they're viewing in the detail table.

1. Enable Summary Columns

For all three types of task worksheets, enable the columns that you want to show in the summary section. Here are some examples:

- In the communication-type task worksheet, you enable the **Compensation Amount - Component 1** and **Eligibility Status - Component 1** columns.
- In the performance-type task worksheet, you enable the **Performance Rating**, **Workers with Compensation**, **Actual Percentage**, and **Total Compensation Percentage** columns.
- In the promotions-type task worksheet, you enable the **Promotions**, **Percent Promoted**, **Deviation from Company Target**, and **Filter** columns.

For communication-type worksheets, you can configure the **View or Print** column properties to hide the print icon for ineligible individuals.

For performance-type task worksheets, you can also hide the graph, compensation performance ratings, performance management ratings, all, or a combination in the summary.

For promotion-type task worksheets, you can also enable subtabs that group table information. For example, you enable these subtabs: **By Team**, **By Country**, **By Years in Job**, **By Performance Management Rating**, **By Text Column 1**, and **Organization Averages**.

- You configure the specifics for **By Text Column 1** on the Detail Table tab, under the **User-Defined Columns** group. You can configure the column properties and manage dynamic column conditions and results. The summary subtab aggregates the values from the detail table for all plan management levels.
- If you enable the **Organization Averages** subtab, you can also enable the specific rows that you want that table to show. For example, you enable the **Team One Level Up**, **Team Two Levels Up**, **Department**, and **Enterprise** rows.

2. Optionally Change Display Names and Default Sequences

You can change the display names and default sequences of summary columns, as appropriate for the audience. For example, you want to make your names more meaningful. So, you change **Compensation Amount - Component 1 to Merit Compensation Amount** and **Eligibility Status - Component 1** to **Merit Eligibility Status**.

3. Optionally Configure Plan Info

You can configure the **Plan Info** property for summary columns in the communication and performance type worksheets. Use the property to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an i in it on the column header. They click the icon or hover over it to see the information.

The promotion summary doesn't have any column properties for you to configure.

4. Configure Summary Display Options for Promotion Worksheets

You can also configure display options for promotion summaries. For example, you enter **Company Target - Average Percent Promoted** and **Minimum Team Size to See Company Target** values. And you set the default display order and graph bar color.

5. Check the Configuration

To see the worksheet summary just the way that the plan audience will see it when the plan becomes active, use the Preview tab. You can easily test different summary configurations to find the summary that best conveys the key information the audience needs and wants to see.

Related Topics

- Overview of Performance Ratings in Workforce Compensation Plan Worksheets
- Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets

Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets

You can enable columns from the personal, alerts, employment, salary, component, promotion, and performance groups to appear in the main table of task worksheets. You can also configure your own, user-defined text, numeric, and list columns. And you can enable additional information columns, such as notes, attachments, and histories. You do all of this when you configure the worksheet display.

The compensation, detail table only, performance, and promotion task worksheets all have a detail table. The communication and approvals worksheets don't.

Display Names and Column Sequences

You can provide meaningful column names for the plan audience by changing the default display names. For example, you change **Eligible Salary - Component 1** to **Eligible Salary for Merit Increase**. And you can change the default sequence of any column, as appropriate. Use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the table.

Column Properties

You can configure general, visibility and access, default value, and salary and element mapping properties for the columns you enable. The available sections and properties vary depending on the column.

All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an i in it on the column header. They click the icon or hover over it to see the information.

Preview Tab

To quickly check your page layout configuration for the compensation, detail only, performance, and promotion task worksheets at any time, use the Preview tab. The preview shows the entire worksheet, including the enabled summary information, detail table columns, actions, and column-level and plan-level information.

The approvals and communication task worksheets don't have the Preview tab.

Related Topics

- Compensation Component Number and Name, and Detail Table of Worksheet Display
- Overview of Performance Ratings in Workforce Compensation Plan Worksheets

Approval Subtabs, Columns, and Worker Details Columns Configuration for Approvals Task Worksheets

Only managers with at least one subordinate manager have the approvals task worksheet in their workforce compensation plan. Managers use the approvals worksheet to view the status of their subordinate managers' plan changes, approve or reject submitted changes, or request additional information.

Here's what you enable when you configure the display for approvals task worksheets. For all three steps, you can optionally change the display and default sequence.

1. Enable the worksheet tabs that managers see, such as approvals, compensation overview, salary range analysis, and alerts.
2. Enable the columns that appear on each tab.
3. Enable the columns that appear on the Worker Details dialog box. Managers open the dialog box when they click a link in a column that contains the number of workers or a percentage.

The column group names and the approval tab names that you see on the Configure Worksheet Page Layout page match. This way you know which tab your configuring columns and worker details columns for.

Example

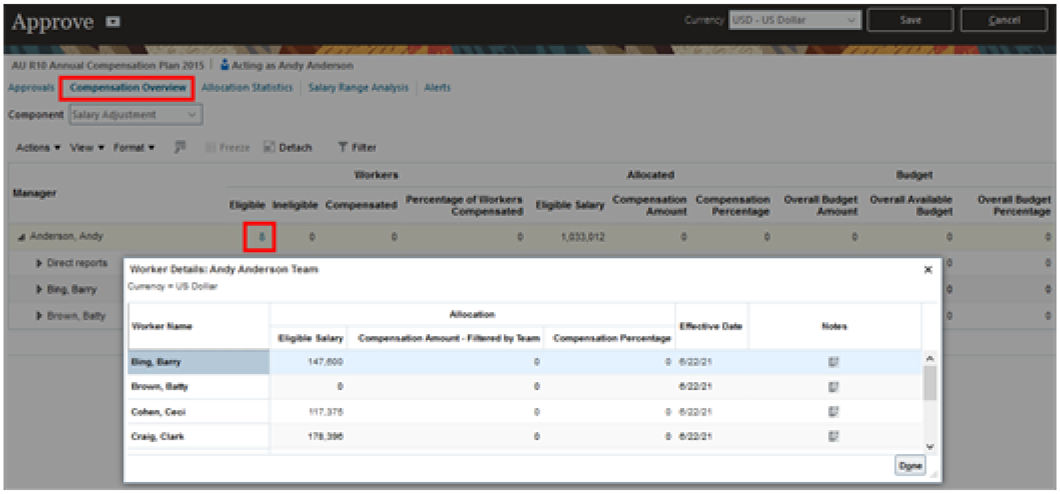
On the Approvals Subtabs tab, you enable the Compensation Overview tab. On the Columns tab, in the Compensation Overview column group, you enable these columns:

Workers	Allocated	Budget
• Eligible • Ineligible • Compensated • Percentage of Workers Compensated	• Eligible Salary • Compensation Amount • Compensation Percentage	• Overall Budget Amount • Overall Available Budget • Overall Budget Percentage

On the Worker Details Columns tab, in the Compensation Overview column group, you enable these columns:

- Allocation columns: Eligible Salary, Compensation Amount - Filtered by Team, and Compensation Percentage
- Effective Date
- Notes

When Andy Anderson opens his approvals task worksheet and clicks the Compensation Overview tab, he sees the columns that you enabled in the table. When Andy clicks the link for his 8 eligible workers, he opens the Worker Details: Andy Anderson Team dialog box with the worker details columns you enabled.



Approval Subtabs

Here are descriptions for the approval subtabs.

Subtab	Description
Approvals	You show a hierarchy of all subordinate managers and the status of their plan changes. We recommend that you leave this subtab enabled.
Compensation Overview	You can show how many people were awarded compensation during the cycle, the total amount allocated, and the total available budget.
Allocation Statistics	You can enable up to five buttons. The buttons show the average allocation and allocation spread. They also show allocations by overall performance rating, by country, and by compensation performance rating.
Salary Analysis	You can enable up to six buttons. The buttons show the compa-ratio, quartile, quintile, and salary range analysis. They also show the total salary cost and average salary.
Target Analysis	You can enable up to three buttons that show the target overview, target versus actual, and deviation from target.
Performance	You can enable up to eight buttons. The performance management buttons show the overall rating, overall competency rating, overall goal rating, and overall development goal rating. The other buttons show compensation performance rating, calculated rating, worker potential, and risk of loss.
Promotions	You show the number of people whose job, grade, or position changed during the compensation cycle.
Alerts	You show all of the currently enabled alerts and the alert counts. You can also let managers view the affected individuals.

Related Topics

- Configure Approvals for Workforce Compensation Plan Worksheets

Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets

The actions that you enable let managers set their own defaults using the **Personalize Layout** tool on their worksheets. You enable the actions as part of the **Configure Worksheet Display** task. You set the initial default values using the **Configure Default Worksheet Display** task. The specific actions that you can enable depend on what type of task the worksheet is for. For example, in compensation worksheets, you can enable the **Actions**, **View**, and **Format** menus and corresponding options that show on the detail table. Communication worksheets don't have the **Actions** menu or corresponding options.

For these actions, you also need to enable a corresponding column in the Detail Table tab:

Enabled Action	Detail table Column to Also Enable
Any rank workers actions in the **Actions** > **Rank Workers** group. **Tip:** To let managers see full ranking details, also enable **View Ranking Details** in the **Right Click Menu** group.	**Ranking** in the **Performance** group
View Compensation History in the **Right Click Menu** group.	**Compensation History** in the **Additional Information** group
Manage Notes in the **Right Click Menu** group.	**Notes** in the **Additional Information** group
Any **Apply Targets** actions in the **Apply Targets** group and **Apply Targets** in the **Right Click Menu** group	At least one target column in an enabled component group, such as **Target Compensation Amount - Component 1**

Hide Ineligible Workers Action

This action applies to people with an Ineligible status after the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes evaluate the plan-level eligibility profiles. The action ignores anyone with an **Ineligible** status according to eligibility profiles added to the compensation components.

Model Actions

You can add the models task worksheet to the plan using the **Configure Models** task. And managers can use that task worksheet for all of their modeling. You can also enable the **Model** actions for a worksheet to let managers create and apply models while they're in that worksheet. You don't need to enable model actions to include the model worksheet. But if you enable any model actions, you also need to configure modeling.

Preview Tab

To quickly check your page layout configuration for the compensation, detail only, performance, and promotion task worksheets at any time, use the Preview tab. The preview shows the entire worksheet, including the enabled summary information, detail table columns, actions, and column-level and plan-level information.

The approvals and communication task worksheets don't have the Preview tab.

Related Topics

- Compensation and Promotion Worksheet Actions
- Performance Worksheet Actions
- Communication Worksheet Actions
- How the Ranking Score is Calculated

Information Configuration in All Task Worksheet Displays

You can provide managers with important information in the page header of any task worksheet when you configure the worksheet display. For example, you can explain policies that apply to merit increases, performance evaluations, or promotions for the upcoming focal compensation cycle. You can also include links to details.

41 Worksheets: Column Properties

General Properties of Worksheet Columns

You control the column appearance, position, and data storage using the options available in the General section of the Configure Column Properties page. The available properties depend on the type of column you're configuring and the selections you make on the page. Here's a comprehensive list of the General section properties:

Field	Description
Column	Read-only field that identifies the column you're configuring the properties for.
Column Width in Pixels	Set the specific width, anywhere from 50 to 200 pixels.
Data Type	Read-only field that identifies whether the column values are numbers or characters.
Decimal Place to Display	Identify the number of places to show to the right of the decimal.
Default Sequence	Default position of the column in relation to the other columns in the summary area, detail table, or dialog box that you're configuring.
Display Name	Identify the column with a name that's meaningful to the people working with the workforce compensation plan.
Enable large amount of text	For user-defined text columns 12 -- 15, let managers enter up to 4,000 characters in the column.
Include in audit trail	Include changes made to this column in the audit trail.
Monetary	Show the monetary values in the currency selected on the worksheet. The worksheet currency could be the corporate currency, the manager's preferred currency, or the individual's local currency. When the manager switches the currency, the worksheet converts the monetary values from the previous currency to the current currency using the specified conversion rate.
Rounding Rule	Specify whether to round numbers up or down and to what decimal place, such as **Round down to .01**. Or, you can use currency rounding and make sure to populate **Configure Currency Properties** using the **Configure Plan Currency** task.
Show numeric separators	Show separators for numbers, such as commas and periods.
Show totals	Include the total for all components in the summary section of the compensation worksheet. Available for only numeric compensation component columns on the Summary tab.
Value Remains Unchanged	Keep the percentages stored in these columns, even when the corresponding amount changes:

Field	Description
	• Compensation Percentage of Eligible Salary • Compensation Percentage of Maximum • Compensation Percentage of Minimum • Target Percentage • Target Percentage Maximum • Target Percentage Minimum • Worker Budget Percentage • Percentage of Budget Pool
Wrap text	Adjust row height rather than column width to show all of the value.

Related Topics

- Overview of Worksheet Display in Workforce Compensation Plans

Visibility and Access Properties of Worksheet Columns

You control the visibility of and access to the column using options on the Configure Column Properties page. The type of column you're configuring determines whether this section is available.

Main Column Settings

Determine whether to include the column in the worksheet and if people can only view data or can also update it using main column settings. If you enable the column, you can also specify whether it should not appear until the manager opts to show it. If you initially hide the column, you need to enable **View** on the Actions tab so that managers can show it. You can also control general column access. If you set role-based overrides, the main column access setting applies to all roles not identified as part of the override.

Role-Based Overrides

You can refine column visibility and access by roles. You select the main column setting you want to override. Next you specify whether the override applies to either the people who have the added roles or who have none of them. And then you add the applicable roles. Any role-based overrides take precedent over the main column visibility and access settings.

We recommend that you configure the main column setting to apply to the majority of roles. Then, configure the override settings for the least affected roles.

Example Configurations

You want everyone but line managers to see the current compa-ratio column.

1. Enable the **Salary Range Compa-Ratio - Current** column.
2. In the column properties Visibility and Access section, set **Override Setting** to **Not Enabled**.
3. Set **Condition** to **User has any of these roles**.

4. Add the **Line Manager** role.

You want everyone to see the **Individual Performance Multiplier** user-defined column but only compensation managers to update values.

1. Enable a user-defined numeric column and name it **Individual Performance Multiplier**.
2. In the column properties Visibility and Access section, set **Override Setting** to **Updatable**.
3. Set **Condition** to **User has any of these roles**.
4. Add the **Compensation Manager** role.

You want everyone to see and update the **Individual Performance Multiplier** user-defined column. You don't want alternate approvers who aren't compensation or line managers to view or update it.

1. Enable a user-defined numeric column and name it **Individual Performance Multiplier**.
2. In the column properties Visibility and Access section, set **Override Setting** to **Not enabled**.
3. Set **Condition** to **User has none of these roles**.
4. Add the **Line Manager** and **Compensation Manager** roles.

Related Topics

- Overview of Worksheet Display in Workforce Compensation Plans
- Performance Considerations for Workforce Compensation Plans

Default Value Properties of Worksheet Columns

You can set default values for the column by selecting from the options available in the Default Values section of the Configure Column Properties page. The values populate the worksheet column when you run the **Start Workforce Compensation Cycle** process. To refresh the default values for the column when you run the **Refresh Workforce Compensation Data** process, select the **Default value subject to refresh** property.

Here are properties that you can select from to set default values. Unless otherwise specified, after you set a property, the other properties disappear except Default value subject to refresh. You can see all properties again by clearing the current setting.

Property	Description
Default Value	Enter a specific number of series of characters that appears by default in the column.
Default and Override Formula	Replace any existing values, including blank, with default values returned by the specified **Compensation Default and Override** formula. For example, use a formula to get stored scores, rating, incentive plan amounts, target percentages, and special earning calculator values. Then use the formula results to set default values for the column. To verify that the selected formula returns the expected results, run a test using a sample person record. Run the test by clicking the **Test Condition and Column Results** icon next to the formula. • If you get an incorrect formula, use the **Fast Formulas** task to correct your formula. • If you don't see an expected salary, make sure that the person's salary record exists as of the HR data extract date. • If a person unexpectedly has an **Ineligible** status, check the eligibility profile for their assignment.

Property	Description
Compensation Derived Factor	Set default column values using a compensation derived factor. You create derived factors for compensation using the **Derived Factors** task in the Compensation work area.
Cross Reference Plan	Select the workforce compensation plan with the data you want to use as default values in this column. It can be the same plan. After you select the plan, you need to specify which cycle and column to extract the default values from.
External Data Record Type	Specify whether the external data you're showing in the column is from a legacy application or third party. After you select the record type, you need to select the external data column to get the default values from, for example, Column 16.

Reference

For descriptions of every worksheet column, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). You can also see this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets.

Related Topics

- Miscellaneous Rate Component Columns and User-Defined Columns
- Overview of Worksheet Display in Workforce Compensation Plans
- When to Use a Fast Formula or Dynamic Column to Display Information in a Worksheet Column
- Formula Type Is Compensation Default and Override

Cross-Reference Column Properties

You can use values from another column as default values for a column as long as neither column is a percentage column. That other column can be in the same worksheet, a different worksheet in the same plan, or a worksheet in a different plan. For example, you want your managers to see all compensation for the workforce compensation cycle when they're planning salary and bonus changes. Because they use separate plans to make these changes, you cross-reference the relevant amounts from the other plan.

- In the salary plan worksheet, you enable a column, such as a miscellaneous rate or user-defined column, to show the bonus amounts as default values.
- In the bonus plan worksheet, you enable a similar column to show the salary amounts as default values.

Or maybe you want to generate a single compensation change statement that shows the compensation changes from the multiple plans managers use in the cycle. You create a plan that has only a communication task worksheet. Then you enable and configure the columns, as shown here.

Compensation Change Statement Column	Cross-Reference
Compensation Amount - Component 1	Merit plan, Compensation Amount - Component 1 column
Compensation Amount - Component 2	Bonus plan, Compensation Amount - Component 1 column
Compensation Amount - Component 3	Stock plan, Compensation Amount - Component 1 column

The worksheet with the cross-references shows the latest referenced data as soon as people save their changes to that data.

Cross-Reference Plan

You can cross-reference a column from any active plan, even plans with no started cycles. You can even cross-reference the same column in the same plan worksheet to use values from a previous workforce compensation cycle. For example, you want managers to consider target amounts or bonuses from the previous cycle when they make their plan changes in the current cycle.

Managers can't see the default values for plans with no started cycles. You need to run the **Start Workforce Compensation Cycle** process for the relevant plans and then they can see the default values.

Cycle Matching

Here's how you can specify which started workforce compensation cycle to get the referenced values from. The plan cycle name and extract dates come from the plan cycles configurations of the plan with this worksheet and the cross-referenced plan.

Value	Description
Same Cycle Extract Date	Get the reference data from the plan cycle with the same HR data extraction date as this plan's cycle.
Same Cycle Display Name	Get the reference data from the plan cycle with the same name as this plan's cycle.
Previous Cycle Extract Date	Get the reference data from the plan cycle with the HR data extraction date that's closest to, but still before this plan cycle's extract date.
Latest Cycle Extract Date	Get the reference data from the most recent plan cycle, without regard to this plan cycle's extract date. Typically, you use this value in a plan that's always available and automatically clears after the new cycle runs.

Reference

For descriptions of every worksheet column, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). You can also see this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service

- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets.

Related Topics

- Default Value Properties of Worksheet Columns
- Overview of Worksheet Display in Workforce Compensation Plans

Formula Type Is Compensation Default and Override

To determine the default values for a worksheet column in a workforce compensation plan, you can create formulas using the **Compensation Default and Override formula** type.

Here's a comprehensive list of the contexts available to this type of formula:

- DATE_EARNED
- EFFECTIVE_DATE
- END_DATE
- START_DATE
- HR_ASSIGNMENT_ID
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID
- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Unique numeric identifier for the workforce compensation plan
CMP_IV_PERIOD_ID	Number	Y	Unique numeric identifier for the fiscal calendar period

Input Value	Data Type	Required	Description
CMP_IV_COMPONENT_ID	Number	Y	Unique numeric identifier for the workforce compensation plan component
CMP_IV_ITEM_NAME	Char	Y	Name for the workforce compensation plan item
CMP_IV_PERSON_ID	Number	Y	Unique numeric identifier for the individual associated with the workforce compensation plan
CMP_IV_PLAN_START_DATE	Date	Y	Date when the workforce compensation plan becomes active
CMP_IV_PLAN_END_DATE	Date	Y	Date when the workforce compensation plan becomes inactive
CMP_IV_PLAN_ELIG_DATE	Date	Y	Date when the workforce compensation plan becomes eligible
CMP_IV_PERFORMANCE_EFF_DATE	Date	Y	Date to use for compensation performance ratings
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Date on which job, grade, and position changes take effect
CMP_IV_XCHG_RATE_DATE	Date	Y	Date when the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes obtain conversion rates from the general ledger daily rates table.
CMP_IV_ASSIGNMENT_ID	Number	Y	Date to use for assignments

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_DEFAULT_VALUE	Number/Char/Date	Y	Default value from the formula. The date should be in yyyy/mm/dd format
L_DATA_TYPE	Char	Y	Data type of the column

This sample formula determines the value of a column based on its item name.

```
/***********************************************************
FORMULA NAME : Compensation Default and Override Formula
FORMULA TYPE : Compensation Default and Override
DESCRIPTION : Defaults the value of a column based on its item_name
*************************************************************/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number),
 CMP_IV_ITEM_NAME (text)
/*=========== INPUT VALUES DEFAULTS ENDS======================*/

/*================ FORMULA SECTION BEGIN =======================*/

DEFAULT FOR CMP_IV_ITEM_NAME IS 'YYYYYYY'
L_DEFAULT_VALUE = to_char(0)
IF (CMP_IV_ITEM_NAME = 'AmountComp1') THEN
(
L_DEFAULT_VALUE = to_char(3333)
)
ELSE IF (CMP_IV_ITEM_NAME = 'AmountComp2') THEN
(
L_DEFAULT_VALUE = to_char(7777)
)
ELSE
(
L_DEFAULT_VALUE = to_char(-999)
)
RETURN L_DEFAULT_VALUE

/*================ FORMULA SECTION END =======================*/
```

Related Topics

- Default Value Properties of Worksheet Columns
- Formula Compilation Errors
- Formula Execution Errors
- When do I run the Compile Formula process
- Example of Writing a Fast Formula Using Formula Text

Sample Compensation Default and Override Formulas

You can test setting default values for worksheet columns in a workforce compensation plan using these sample formulas of type **Compensation Default and Override**. You can also use these sample formulas to create your own versions.

CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE

Calculates the eligible salary by averaging the daily salary. The formula accounts for number of days that a salary is in effect during the evaluation period of the workforce compensation cycle.

CMP_ELIGIBLE_SALARY_PRORATION_MONTH_END_AVERAGE

Calculates the eligible salary by averaging the salary on the last day of each month in the evaluation period of the workforce compensation cycle. The calculation uses the salary on the last day of the evaluation period for midmonth evaluation end dates.

CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_NINETY_DAY_MIN

Calculates the eligible salary by averaging the daily salary. The formula accounts for the number of days that a salary is in effect during the evaluation period of the workforce compensation cycle. It returns 0 for people who worked fewer than 90 days.

CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_USING_FTE

Calculates the eligible salary by averaging the daily salary adjusted for part-timers. The formula accounts for the number days that a salary is in effect and FTE during the evaluation period of the workforce compensation cycle.

CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_FOR_JOBS

Calculates the eligible salary by averaging the salary for the number of days the person holds a specific job code on the assignment. The formula accounts for the number of days that a salary is in effect during the evaluation period of the workforce compensation cycle.

Related Topics

- General Properties of Worksheet Columns
- Formula Type Is Compensation Default and Override

Salary and Element Mapping Properties of Compensation Amount Columns

You can specify whether approved compensation amount changes for the component transfer to HR as single payments or as adjustments to people's salary amounts. Use the options in the Element Mapping section of the Configure Column Properties page.

Single Payment

To pay the changes as a single payment, set **Post as Salary** to **No**. Then add the payroll elements to use to pay the specified compensation amount. You can add multiple payroll elements to accommodate payments in different currencies and to pay people in different legislative data groups.

Base Pay Adjustment

To adjust base pay by the specified compensation amount, set **Post as Salary** to **Yes**. When the **Transfer Workforce Compensation Data to HR** process runs, it updates each person's salary with the amount stored in the compensation amount column of the component. You can also post any itemized adjustments for future reference.

Related Topics

- Compensation Components in Workforce Compensation Plan Worksheets
- Compensation Component Number and Name, and Detail Table of Worksheet Display
- How You Enable Salary Itemization Using Incremental Components
- Incremental Salary Component Lookups

Post Incremental Itemized Salary Adjustments in a Workforce Compensation Plan to HR

To post the component amount change as an itemized adjustment, you select the applicable incremental salary component. The **Transfer Workforce Compensation Data to HR** process then updates each person's salary. It also adds the incremental salary component and that component adjustment amount to the salary for future reference.

To post the compensation amounts of all enabled incremental components as a single adjustment to each person's salary, leave these fields blank:

- Salary Component
- Salary Includes Simple Components

Example Configuration

Your workforce compensation plan has a compensation task worksheet with the **Merit** and **COLA** compensation components enabled. A manager uses the worksheet to give someone a $5,000 merit increase and a $1,500 cost of living increase. Here's how you configure the column properties so both component amounts increase the person's salary amount by $6,500. The adjustments also transfer for future reference.

- For both components, set **Post as Salary** to **Yes**.
- For the **Compensation Amount - Merit** component, set **Salary Component** to **Merit**.
- For the **Compensation Amount - COLA** component, set **Salary Component** to **Cost of living**.

Related Topics

- Considerations for Using Salary Bases with Incremental Components versus Simple Components
- How to Determine a Salary Amount
- How You Enable Salary Itemization Using Incremental Components
- Compensation Components in Workforce Compensation Plan Worksheets
- Compensation Component Number and Name, and Detail Table of Worksheet Display

Post Simple Itemized Salary Adjustments in a Workforce Compensation Plan to HR

To post the component amount change as an itemized adjustment, you select the applicable simple salary component or let primary plan managers select it. The **Transfer Workforce Compensation Data to HR** process then updates each person's salary. It also adds the simple salary component and that component adjustment amount to the salary for future reference.

To post the compensation amounts of all enabled simple components as a single adjustment to each person's salary, leave these fields blank:

- Salary Component
- Salary Includes Simple Components

Example Configuration

Your workforce compensation plan has a compensation task worksheet with the **Merit** and **COLA** compensation components enabled. A manager uses the worksheet to give someone a $5,000 merit increase and a $1,500 housing increase. Here's how you configure the column properties so both component amounts increase the person's salary amount by $6,500. The adjustments also transfer for future reference.

- For both components, set **Post as Salary** to **Yes**.
- For the **Compensation Amount - Merit** component, set **Salary Includes Simple Components** to **Manager does not enter components**. Then add the **Merit** component.
- For the **Compensation Amount - COLA** component, set **Salary Includes Simple Components** to **Manager does not enter components**. Then add the **Housing** component.

Related Topics

- Considerations for Using Salary Bases with Incremental Components versus Simple Components
- How to Determine a Salary Amount
- Compensation Components in Workforce Compensation Plan Worksheets
- Compensation Component Number and Name, and Detail Table of Worksheet Display

42 Worksheets: Dynamic Columns in Worksheet Display Configurations

Overview of Dynamic Columns in Workforce Compensation Plan Worksheets

You can calculate and display values that vary by individual for many worksheet columns, including most percentage columns. You do this by building conditional expressions for the appropriate columns. For example, you want to base the bonus eligible salary on the current annual salary. You build a dynamic calculation that moves the current annual salary amount into the **Bonus Eligible Salary** column when you start the workforce compensation cycle.

You can also determine the values in one column using values in another column. For example, as part of the annual bonus review, you want to show managers the bonus target amounts to consider during allocations. You build a dynamic calculation that varies the **Bonus Target Amount** by each individual's performance rating. For example, people with an **Outstanding** performance rating have a bonus target amount that's 10% of their bonus eligible salary. People with a **Meets** rating have an amount that's 5%.

Validation and Testing

You can validate each condition as you build it and test all conditions and column results on the Dynamic Calculation page. You can also export the conditions on the page to review and validate them outside of the worksheet configuration.

Column Information Sourced Outside the Plan

When the information source for a column is outside the workforce compensation plan, you might need to run the **Refresh Workforce Compensation Data** process. For example, dynamic columns that depend on the performance management overall rating might not show the actual performance rating until after you run the refresh process.

Evaluation Order, Sequence, and the Default Condition of Dynamic Worksheet Columns

The evaluation order of dynamic columns identifies the calculation order when the condition of one column uses the results of another column. For example, you build the dynamic column condition of the **Target Compensation Amount Minimum** component column to use eligible salary. You set the evaluation order to **1** for the dynamic column of the **Eligible Salary** component column. And you set the evaluation order to **2** for the corresponding **Target Compensation Amount Minimum** component column. This way the dynamic column for target compensation uses the appropriate eligible salary in its conditions.

Sequence and Default Condition

The sequence identifies the calculation order for conditions on the same Dynamic Column page. The worksheet evaluates every condition for the column in sequence order. The default condition is the condition to use when no other conditions are met, so it has to always be the highest sequence. For example, condition 1 gives people with a performance rating of 5 a 10% bonus. For people who don't have a 5, condition 2 checks to see if they have a 4. If they do, they get a 5% bonus. Condition 3, the default condition, says that everyone else doesn't get a bonus. If you don't select a default condition and no conditions are met, the column displays no values.

Configure conditions that cover the most workers with the highest sequence numbers to improve worksheet and batch process performance. Test a few dynamic calculations at a time to assess the performance impact and decide what level of impact the plan audience can accept.

Related Topics

- Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers

Triggering Events for Conditions of Dynamic Columns and Alerts

You specify when to evaluate the conditions of dynamic columns and alerts by selecting one or more of these triggering events:

Triggering Event	Description	Dynamic Column Example	Alerts Example
Start compensation cycle	When the **Start Workforce Compensation Cycle** process runs, it calculates the results for all dynamic column and alert conditions.	Calculate the eligible salaries that managers use during the cycle.	Let the worksheet managers know that an individual got a recent pay increase and isn't eligible.
Refresh data	When the **Refresh Workforce Compensation Data** process runs, it re-evaluates all dynamic conditions, fast formulas, and the HR data used in dynamic conditions. It also re-evaluates all alert conditions.	Re-evaluate people's eligibility for the workforce compensation plan and worksheet compensation components.	Let the worksheet manager know that performance management ratings were updated and target ranges were adjusted.
Change worksheet data	When managers enter or change the value and leave the field, the worksheet re-evaluates the condition and corresponding results. This trigger might slow worksheet performance. The more dynamic columns you use or the more conditions for the dynamic column, the longer the worksheet takes to respond. For example, you select this option on four dynamic	Calculate people's total compensation amount after managers make changes to current salary amounts.	Let the worksheet manager know that an individual's getting more than the target and they need to provide a justification.

Triggering Event	Description	Dynamic Column Example	Alerts Example
	columns, each with five conditions. When the manager tabs out of a worksheet field, the worksheet evaluates all 20 conditions, regardless of whether the column has dynamic column settings. Use it for only column results that depend on data that changes in the worksheet.		

Related Topics

- Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers

Descriptions for Dynamic Worksheet Column Conditions

You can add up to 1600 characters of meaningful description for the dynamic column condition. Make it clear to people reviewing the worksheet column configuration in later workforce compensation cycles what the purpose of the condition is. You can also explain from where or when information from outside the worksheet came. Click the **Edit** icon next to the field to add or change text.

Related Topics

- Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers

Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert

You can build a condition by selecting worksheet columns, operators, and values in the appropriate order. Use the Basic tab of the Edit Condition dialog box. You can build or edit a condition directly in the **Column Results** field on the Advanced tab. Add valid columns and operations to your expression using the provided choice lists.

Reference

For descriptions of every worksheet column, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). You can also see this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets.

To help you locate columns, the document Worksheet Configuration tab organizes information in the same groupings as the Configure Worksheet Page Layout pages.

Related Topics

- Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers

Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers

Here's how you can configure the dynamic column of the **Compensation Amount - Bonus** component to calculate bonuses according to performance ratings. People with outstanding performance ratings get a bonus that's 10% of their annual salary. People who exceed expectations get a 5% bonus. People with other performance ratings don't get any bonus.

Before You Start

You need to complete these configuration tasks before you can configure the dynamic column:

1. Create a workforce compensation plan using the **Workforce Compensation Plans** task.
2. Configure a bonus compensation component using the **Configure Compensation Components** task.
3. Configure performance management or compensation performance ratings that use a scale of 1 to 5 where **5** is **Outstanding** and **4** is **Exceeds**. Use the **Configure Performance Ratings** task.
4. Enable the appropriate performance rating columns and the **Compensation Amount** column of the bonus component using the **Configure Worksheet Display** task.

Configure the Dynamic Compensation Amount Column

1. In the row for the bonus component **Compensation Amount** column, click the **Dynamic Column** icon.
2. On the Dynamic Column page, select the **Start compensation cycle** and **Refresh data** triggering events.

Build the Condition for People with a 5 Rating

This condition identifies people with a performance management rating of 5 and awards them a bonus that's 10% of their annual full-time salary.

1. Click the **Add** icon.
2. In the **Sequence** field, enter **1**.
3. Identify the eligible people.
   a. Under Condition, the **Create or Edit Expression** icon.
   b. On the Edit Condition dialog box, Basic tab, click **Build Condition**.
   c. In the **Column** field, select **Performance Management Overall Rating**.
   d. In the **Operation** field that appears, select **Equals**.
   e. In the **Fixed Value** field that appears, enter **5**.
   f. Click **Done**.
   g. Optionally, click **Validate**. On the confirmation, click **OK**.
   h. Click **Apply**.
4. Award the 10% bonus.

a. On the Dynamic Column page, under Column Results, click the **Create or Edit Expression** icon.
b. On the Edit Column Result dialog box, Basic tab, select **Equation**.
c. Click **Switch to Column**.
d. In the **Column** field that appears, select **Annualized Full-Time Salary - Current**.
e. Click **Next**.
f. In the **Operation** field that appears, select **Multiplied by**.
g. In the **Fixed Number** field, enter **.1**.
h. Click **Done**.
i. Click **Apply**.

5. Add the description.

a. On the Dynamic Column page, under Description, click the **Create or Edit Description** icon.
b. On the Description dialog box, enter **Award a 10% bonus to people with a performance rating of 5, which identifies them as outstanding.**
c. Click **Apply**.

Build the Condition for People with a 4 Rating

This condition identifies people with a performance management rating of 4 and awards them a bonus that's 5% of their annual full-time salary.

1. Click the **Add** icon.
2. In the **Sequence** field, enter **2**.
3. Identify the eligible people.

a. Under Condition, the **Create or Edit Expression** icon.
b. On the Edit Condition dialog box, Basic tab, click **Build Condition**.
c. In the **Column** field, select **Performance Management Overall Rating**.
d. In the **Operation** field that appears, select **Equals**.
e. In the **Fixed Value** field that appears, enter **4**.
f. Click **Done**.
g. Optionally, click **Validate**. On the confirmation, click **OK**.
h. Click **Apply**.

4. Award the 5% bonus.

a. On the Dynamic Column page, under Column Results, click the **Create or Edit Expression** icon.
b. On the Edit Column Result dialog box, Basic tab, select **Equation**.
c. Click **Switch to Column**.
d. In the **Column** field that appears, select **Annualized Full-Time Salary - Current**.
e. Click **Next**.
f. In the **Operation** field that appears, select **Multiplied by**.
g. In the **Fixed Number** field, enter **.05**.
h. Click **Done**.
i. Click **Apply**.

5. Add the description.

a. On the Dynamic Column page, under Description, click the **Create or Edit Description** icon.
b. On the Description dialog box, enter **Award a 5% bonus to people with a performance rating of 4, which identifies them as exceeds expectations.**

c. Click **Apply**.

Build the Condition for People with Lower Ratings

This condition identifies people with a performance rating that's less than 4 and doesn't award them any bonus.

1. On the Dynamic Column page, click the **Add** icon.
2. In the **Sequence** field, enter **3**.
3. Select **Default**.
4. Award no bonus to everyone who failed to meet the other two conditions.

    a. Under Column Result, click the **Create or Edit Expression** icon for the expression you just created.
    b. On the Edit Column Results dialog box, Basic tab, in the **Fixed Value** field, enter **0**.
    c. Click **Done**.
    d. Click **Apply**.
5. Add the description.

    a. On the Dynamic Column page, under Description for the condition you just created, click the **Create or Edit Description** icon.
    b. On the Description dialog box, enter **Don't award any bonus to people with a performance ratings below 4**.
    c. Click **Apply**.

Test the Dynamic Column Conditions

1. On the Dynamic Column page, click the **Test Condition and Column Results** icon.
2. On the Test Condition dialog box, complete the fields, as shown here.

Variable Name	Test Value
Performance Management Overall Rating	5
Annualized Full-Time Salary - Current	50000

3. Click **Test**.
4. Verify that the results are what you expected and click **OK**.

Related Topics

- Overview of Dynamic Columns in Workforce Compensation Plan Worksheets

When to Use a Fast Formula or Dynamic Column to Display Information in a Worksheet Column

You can vary worksheet column results using fast formulas and dynamic columns. The best method depends on the data you use, the complexity of the calculation, and how frequently you refresh worksheet data.

Data Used

Fast formulas can use any Oracle Fusion application data with a database item. Dynamic columns conditions can use other worksheet columns.

Calculations

Fast formulas can be anywhere from simple to complex with multiple compound conditions or multiple database records. Dynamic columns have simple if-then conditions or a few compound conditions.

Initializing and Refreshing Values

For both fast formulas and dynamic columns, the **Start Workforce Compensation Cycle** process sets the initial column values. The **Refresh Workforce Compensation Data** process re-evaluates column values every time it runs with one of these options selected:

- Refresh column defaults
- Full refresh

Dynamic column values are also re-evaluated if the refresh process runs with the **Refresh dynamic columns** option selected. And they're re-evaluated every time a manager leaves a column field if the dynamic column configuration has **Change worksheet** selected.

Configuration Process

You create formulas using the **Fast Formulas** task. You link them to worksheet columns using the **Properties** icon of the worksheet column. You build dynamic conditions using the **Dynamic Columns** icon of the worksheet column.

Related Topics

- Overview of Dynamic Columns in Workforce Compensation Plan Worksheets
- Formula Type Is Compensation Default and Override
- Overview of Using Formulas

43 Worksheets: Configuration Guidance for Salary and Budget Component Columns, and Promotion Effective Date

Guidelines to Configure the Eligible Salary Component Columns

Many fast formulas and dynamic column conditions use eligible salary to determine percentages, such as allocation, target, and worker budget percentages. So when you use percentage columns, you need to configure the **Eligible Salary** column for each component enabled in the plan. For example, you make eligible salary equal to each individual's current base pay. Or you might prorate their eligible salary according to various factors, such as length of service or geographic location. You need to configure the **Eligible Salary** column when the component budget pool stores budgets as percentages.

- To use a fast formula or derived factor to determine default values, you configure the column properties. You can copy and modify delivered samples of eligible salary proration formulas using the **Fast Formula** task in the Compensation work area. Use the samples with the **Compensation Default and Override** formula type.
- To build conditions that determine each individual's eligible salary, you configure the dynamic column settings.
- Worker budget percentages

Related Topics

- Default Value Properties of Worksheet Columns
- Overview of Dynamic Columns in Workforce Compensation Plan Worksheets
- Compensation Components in Workforce Compensation Plan Worksheets
- Formula Type Is Compensation Default and Override

Guidelines to Configure the Budget Amount - Worker Component Columns

You can use compensation fast formulas to calculate the default monetary amounts shown in the **Budget Amount - Worker** column of each enabled plan component. Or you can use dynamic column conditions to calculate the amounts. Both formulas and conditions calculate the amounts in the individual's currency, determined by the local currency determination code of the compensation component. But, budget and task worksheets store the amounts in the plan currency. To calculate and show the correct results, dynamic column conditions need to divide the local currency value by the corresponding **Currency Conversion Rate** component column.

Related Topics

- Default Value Properties of Worksheet Columns
- Overview of Dynamic Columns in Workforce Compensation Plan Worksheets
- Compensation Components in Workforce Compensation Plan Worksheets
- Formula Type Is Compensation Default and Override

Guidelines to Allocate Compensation as Percentage of Budget

You can allocate compensation as a percentage of the budget pool instead of as a percentage of eligible salary or a flat amount. If you enable the **Percentage of Budget Pool** column for any component, here's what else you need to do:

- On the Configure Worksheet Page Layout page, Detail Table tab, disable the **Percentage of Eligible** Salary column for the corresponding component. Also make sure that the **Value remains unchanged** and **Rounding Rule** column properties aren't selected. Use the **Configure Worksheet Display** task.
- On the Configure Modeling page, disable these allocation methods using the **Configure Modeling** task.
    - Allocate n percent of eligible salary
    - Increase n percent of eligible salary

Rounding Rules

The rounding rule set for the corresponding **Compensation Amount** column affects the amount calculated for the **Percentage of Budget Pool** column. For example, a manager whose overall budget is **900 USD** enters **4** in the **Percentage of Budget Pool** column. Here are the amounts when the corresponding **Compensation Amount** column does and doesn't have a rounding rule of **Round to the nearest 10**.

Column	Calculation	Amount with Rounding	Amount without Rounding
Component Amount	Entered Percentage / 100 * Overall Budget Amount (4 / 100) * 900	40	36
Percentage of Budget	Compensation Amount / Overall Budget Amount	4.44	4

If you set a rounding rule for a **Compensation Amount** column, don't set a rounding rule for the corresponding **Percentage of Budget Pool** column. Or if you select **Use currency rounding** for the **Compensation Amount** column, don't select it and the rounding rule property for the **Percentage of Budget Pool** column. If you want to round the percentage instead of the compensation amount, you do the opposite. Set either the **Rounding Rule** or the **Use currency rounding** property for the Percentage of Budget Pool column. And make sure that neither property is set for the **Compensation Amount** column.

Guidelines to Configure Default Values for the Promotion Effective Date Column

The batch processes for workforce compensation use promotion effective dates in plan worksheets to get new salary ranges and compa-ratios. The processes also use the dates to get other salary metrics when the promotion includes a change to the person's grade. You can set a default effective date for everyone promoted through a workforce compensation plan using the **Configure Plan Cycles** task. Then, you can enable the **Promotion Effective Date** column in the appropriate task worksheets and configure the column properties.

- Let managers override the default date for individuals they promote during the compensation cycle.
- Specify whether the **Refresh Workforce Compensation Data** process refreshes the **Promotion Effective Date** column values.

Subject to Refresh	What Happens
Yes	a. A manager overrides the default promotion effective date. b. The **Refresh Workforce Compensation Data** process changes the worksheet column date back to the default promotion effective date set for the plan cycle. c. The process uses the default date to refresh the corresponding salary metrics.
No	The **Refresh Workforce Compensation Data** process uses the promotion effective date to refresh the corresponding salary metrics. The date in the worksheet column is from either of these sources: ◦ Default promotion effective date for the plan cycle ◦ Manager-entered date

Related Topics

- Workforce Compensation Plan Cycle Dates
- Default Value Properties of Worksheet Columns
- Overview of Worksheet Display in Workforce Compensation Plans
- Refresh Data Process Options

44 Worksheets: Miscellaneous Rate Component Columns, User-Defined Columns, and External Data in Task Worksheets

Miscellaneous Rate Component Columns and User-Defined Columns

You can include your own numeric, text, and list information in worksheet columns of workforce compensation plans.

Miscellaneous Rate Component Columns

You can share numeric values with managers and let them enter their own values using the six miscellaneous rate columns under the component groups. For example, you want to use a target stored outside the plan to calculate bonuses. All six columns are updatable and you can default values for them using a plan cross-reference. But, if an individual isn't eligible for the component, managers can't edit their value.

With these columns, you can show totals for the detail table population in the summary table view.

User-Defined Columns

You can share numeric, text, and list values with managers and let them enter or select their own values by configure user-defined columns. For example, you want to include external stock data, such as vested and unvested shares and the vesting date. All user-defined columns are updatable and you can default values for them using a plan cross-reference.

The numeric columns can display any numeric value and the text columns can display any text value. **List Column 46** displays the values that you define in the **CMP_CWB_CUST_COL_46_LIST** lookup type. **List Column 47** displays the values that you define in the **CMP_CWB_CUST_COL_47_LIST** lookup type, and so on, for list columns 48 -- 50. You can override the default lookup type and use a different lookup type. To edit the default lookup types and create your own, use the **Lookups** task in the Compensation work area.

You can't show totals for these columns in the summary table view because they aren't available to enable there.

Related Topics

Configure User-Defined Columns of a Workforce Compensation Plan Worksheet to Show External Data

Here's how you configure user-defined worksheet columns to show external data in a workforce compensation plan.

1. In the Compensation work area, click **Workforce Compensation Plans**.
2. On the Workforce Compensation Plans page, create the plan or search for and open an existing plan.

3. On the Define Workforce Compensation page, under Worksheets, click **Configure Worksheet Display**.
4. On the Configure Worksheet Display page, in the worksheet task row, click the **Configure Task Layout** icon.
5. On the Configure Worksheet Page Layout page, click the Detail Table tab.
6. Expand the **User-Defined Columns** group.
7. Enable the text, numeric, or list column, depending on what type of external data you're showing in the column.
8. Give the column a meaningful display name, such as **Prior Bonus Amount** or **Target Information**.
9. Configure the external data record type and column properties.
10. Save your changes and configure more columns or save and close the task worksheet.

Related Topics

- Record Type Lookups for External Compensation Data

45 Worksheets: Default Worksheet Display and Individual Worker Display

Default Display Settings for Workforce Compensation Plan Worksheets

You determine display defaults for worksheets when you configure the default worksheet display. For example, you can set the team filter to default to **Direct reports** or to **Direct reports if total workers exceeds 30, else show all**. Setting **Team Filter** to an option other than **All workers** improves worksheet performance when managers switch from list to tree view in the detail table.

You can also set default visible rows and row height and frozen columns. You can set the detail table to show as a list or tree by default. And you can specify whether worksheet information, worksheet summary, and table filters are open or closed by default.

> **Tip:** Managers can override these plan-level defaults by specifying their own default display settings in their worksheets.

Related Topics

- Overview of Worksheet Display in Workforce Compensation Plans

Overview of Individual Worker Display in Workforce Compensation Plan Worksheets

You can let managers view information about each individual in their worksheet by configuring the individual worker display. Depending on how you configure the page, managers can also allocate compensation, promote the individual, add notes and attachments, and view alerts.

You start by specifying whether the page shows the individual's information using up to 10 infotiles or as a single scrolling page. You can include up to 15 sections on the scrolling page and per infotile. If you have more than 15 sections that you want to share with managers, you need to use infotiles. Managers click each infotile to see the related sections.

You can also use infotiles to provide managers with more focused information to review and possibly change. For example, you configure one infotile to show person information. You add a section that shows the individual's details, such as their country, eligibility status, and email. And you add another section to show their assignment details, such as legal employer, location, department, direct manager, and years employed. Then you configure another infotile to show salary information. It has one section that shows summary information and another section that shows current salary. A third section lets managers allocate salary.

After you decide how you want to present information on the individual worker page, you add sections. Then you configure the content for each section. At any point along the way, you can save your current settings and preview what managers would see. The data fields are blank because the preview doesn't know about any specific individual.

Individual Worker Page Content in Workforce Compensation Plan Worksheets

You add content to the individual worker page by adding sections. The single scrolling page and each infotile can have up to 15 sections.

Content Type	Content Source
Predefined Content	• Specific worksheet columns that are also available when you configure a task worksheet display, such as alerts, attachments, notes, job, performance, and salary histories. • Oracle Transactional Business Intelligence reports. Use the **Properties** icon to add any OTBI and Oracle Business Intelligence Enterprise Edition reports from the **/shared/Custom/Human Capital Management/Compensation** folder.
Salary Simple Components	The same summary columns that are available when you configure a task worksheet display and all of the simple components in the salary table. You can configure column properties, but any changes also affect the summary columns of the task worksheets. Not every simple component that you enable applies to every individual. Managers see only the components configured for the individual's salary basis.
Summary	The same summary columns that are available when you configure a task worksheet display. You can configure column properties, but any changes also affect the summary columns of the task worksheets.
Worksheet Columns	The same worksheet columns that are available when you configure a task worksheet display. You can configure column properties and dynamic columns, but any changes also affect the detail table columns of the task worksheets.
Salary Rates	Rate data from the salary tables as of the HR data extraction date

You use different sections with different content types to add a mix of information about the individual to the page. For example, you add an employment section with worksheet columns. You add job and performance history sections with predefined content. And you add a salary summary section with summary columns.

> **Tip:** The predefined content renders best when you add one option per section. For example, if you want to include alerts and attachments, add one section for alerts and another section for attachments. Don't combine them in a single section.

Related Topics

- Overview of Worksheet Display in Workforce Compensation Plans
- Configure the Summary Display for Compensation Task Worksheets
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Overview of Dynamic Columns in Workforce Compensation Plan Worksheets

46 Worksheets: Alerts

Overview of Alerts in Workforce Compensation Plan Worksheets

You can use alerts to let worksheet managers know about issues that require their attention. You enable alerts to appear in the task worksheets of workforce compensation plans using the **Configure Worksheet Display** task. You enable predefined alerts and build and enable your own alerts using the **Configure Alerts** task. The triggering events for the alerts that you build are the same as the events for dynamic columns. And how you build alert conditions is the same as building dynamic column conditions. To test each alert condition that you build, use the **Test alert conditions** icon on the toolbar.

Alert names are the actual alert that managers see in their worksheets. You show them additional information, such as how to fix an issue, in the description. For example, you have an alert titled **Can't allocate more than target**. The description is **Adjust this individual's allocation to be less than or equal to the target**.

Related Topics

- Include Alerts in Task Worksheets
- Triggering Events for Conditions of Dynamic Columns and Alerts
- Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert

Predefined Alerts for Workforce Compensation Plan Worksheets

To notify managers about issues in their worksheet that need their attention, you can enable predefined alerts using the **Configure Alerts** task.

Predefined Alert	When the Alert Appears in a Worksheet
Salary changed in HR	Salary amount changed in HR
Allocation outside target range	Compensation amount for the component is less than the target minimum or greater than the target maximum configured in the column properties
Grade changed in HR	Grade changed in HR
Primary worksheet manager does not match line manager	Primary worksheet manager doesn't match line manager on the individual's employment record

Predefined Alert	When the Alert Appears in a Worksheet
New salary outside salary range	New salary amount is less than the salary range minimum or greater than the salary range maximum for the individual's current grade
Worker was terminated	Individual's employment was terminated in HR
Outside Defined Limits	Compensation minimum or maximum amount is outside of the limits set for the column

Example Alert to Warn Managers That Their Allocated Compensation Amounts Changed

You want to warn managers when someone else changes a component compensation amount that they entered for an individual.

Field	Value
Name	Someone changed the compensation amount
Type	Warning
Criteria	**Original Amount Updated By - Component 1** column is not equal to **Compensation Amount Last Updated By - Component 1** column
Description	Someone overrode the compensation amount that you entered.
Triggering Events	

Related Topics

- Triggering Events for Conditions of Dynamic Columns and Alerts
- Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert

Example Alert to Prevent Managers from Allocating More Than the Targeted Compensation

Your company policy prohibits managers from allocating more compensation than is targeted for an individual.

Field	Value
Name	Allocation can't exceed the target
Type	Error preventing submit **Note:** This type prevents managers from saving or submitting their worksheet until they resolve the issue.
Criteria	**Compensation Amount - Component 1** column is greater than **Compensation Target - Component 1** column
Description	You need to adjust the compensation amount you allocated to this person because it can't exceed the target amount.
Triggering Events	

Related Topics

- Triggering Events for Conditions of Dynamic Columns and Alerts
- Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert

Example Alert to Notify Managers When the New Base Salary Is Greater Than the Range Maximum

Your company policy prohibits managers from allocating more compensation than is targeted for an individual.

Field	Value
Name	New base is over the range maximum
Type	Information
Criteria	**New Base Salary** column is greater than the **Salary Range Maximum - Current** column or **New Base Salary** column is greater than the **Salary Range Maximum - New** column
Description	The individual's new salary exceeds their salary range maximum.
Triggering Events	

Related Topics

- Triggering Events for Conditions of Dynamic Columns and Alerts
- Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert

47 Worksheets: Assignment Segments

Overview of Assignment Segments in Workforce Compensation Plan Worksheets

You can include prorated values for relevant component worksheet columns is a separate table in the worksheet when you configure assignment segments. Rather than multiple columns in the detail table, you can show the information using separate rows for each segment. And you can let managers make changes in the relevant fields. For example, this person's bonus amount is calculated according to their eligible earnings and target percentage for 2 segments of time during the workforce compensation cycle.

Start Date	End Date	Salary	Currency	Days Eligible	Proration Factor	Eligible Earnings	Target %	Target Amount	Modifier	Payout Amount
Jan 1	Mar 14	75,000	USD	73	.2 (73/365)	15,000	15	2,250	1.1	2,473
Mar 15	Dec 31	82,500	USD	292	.8 (292/365)	66,000	20	13,200	1.1	14,520
										16,995

The segment values, in this case payout amounts, are summed and shown in the table footer. When the manager clicks **Apply**, the total passes to the read-only worksheet column that you specified.

> **Tip:** It's important that when you configure assignment segments, you start with the end in mind. Identify what data you need to store, what you want to calculate, and what data is and isn't editable.

Basic Process to Configure Worksheet Assignment Segments

Here's the basic process to include assignment segments in a compensation, detail table only, performance, or promotion task worksheet. All tasks are in the Compensation work area.

1. Load your assignment segments using the **External Data** task.
2. Make sure that all of the compensation cycles are closed for the workforce compensation plan. This way you have all configuration options available because certain options aren't available to open cycles.
3. Identify the compensation component you want to use for assignment segment. Also identify the amount column to use for the assignment segments. It can be the **Compensation Amount** column or one of the six

miscellaneous rate columns for the component. This column is how you can feed segment totals to worksheet summary views. You can also use the totals as default values for the selected column in the detail table of the worksheet.

4. Configure only one of the five available compensation components for assignment segments. Use the **Configure Compensation Component** task. You need to configure a component that isn't mapped to salary rates and doesn't have salary rates mapped to it.
5. Enable the **Assignment Segments** column in the **Additional Information** group of the detail worksheet table using the **Configure Worksheet Display** task.
6. Enable and configure the assignment segments using the **Configure Assignment Segments** task. To reduce horizontal scrolling, enable try to enable no more than 10 columns. To give managers a more robust view of the assignment segment table, select **Show detach icon**.

   Just like for all worksheet columns, you can set meaningful display names and change the default sequence. You can also set properties for assignment segment columns. The specific properties you can set depend on the column.

   - General, such as column shading, rounding rule, and decimal precision
     - For one numeric segment column, you need to set **Selected for Totaling** to **Yes**.
     - For each segment column you want to include in worksheet audit trails, you need to select **Include in audit trail**.
   - Visibility and access, such as line managers can only read the column data but compensation administrators can read and edit it
   - Default value, such as a specific number or text, or values provided by a specified formula, compensation derived factor, or from a cross-referenced column
     - For each segment column the **Refresh Workforce Compensation Data** process should update after people make changes, you need to select **Default value subject to refresh**.
   - Information, such as the calculation or dynamic column condition used to determine the segment column amounts or the source of the segment column data

   For many segment columns, you can also build dynamic conditions, for example, to determine the proration factor.

   To let managers view changes to assignment segments in worksheet audit trails, for only one segment column, select **Audit Differentiator**.

   If you change **Enable Assignment Segments** to **No**, you delete all segment configurations. Changing it back to **Yes** won't restore the configurations. If you leave the page before saving the change to **No**, you can restore any configurations saved before you set **Enable Assignment Segments** to **No**.

Related Topics

- Configure Assignment Segments Options of a Compensation Component
- Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Options to Configure the Default Values Section
- Dynamic Calculations in Compensation Plans

Data for Worksheet Assignment Segments

Assignment segment data can come from HR or from third-party or legacy application. To use it in worksheet columns of a workforce compensation plan, it has to be in the external data table. To use the external data specifically in assignment segments, each row needs to include all of this information:

- An end date
- An assignment number
- A job

When you load monetary segment amounts, you need to convert them to the same currency the individuals use, as of the HR data extraction date.

You can use up to 50 of the available 65 user-defined assignment segment columns at a time. The user-defined columns are 50 numeric, 15 text, and 5 date columns. Keep in mind you're repeating data in rows instead of in columns and most likely won't need all 50.

You can also use these columns. They're automatically available on the Configure Assignment Segments page and you don't need to map them to user-defined columns:

- Person Name
- External Worker Data ID
- Assignment Number
- Legal Employer
- Worker Number
- Job
- Record Type
- Start Date
- End Date
- Eligibility Status
- Sequence Number
- Currency Code

The column that you use to show the assignment segment totals needs to be read-only in the worksheet.

Related Topics

- External Compensation Data
- Options to Configure the Default Values Section
- Configure User-Defined Columns of a Workforce Compensation Plan Worksheet to Show External Data
- Example of Loading External Data

Visibility, Ability to Update, and Restrictions for Worksheet Assignment Segments

Compensation administrators can see all assignment segment columns of a workforce compensation plan when they administer workers. This includes where segment data that's loaded but not showing for the worksheet manager.

Whether managers can see assignment segments depends on the configuration. This includes whether you specify to **Show ineligible rows** when you configure assignment segments. Also, managers need to have the detail table in list, not tree, view to see the Assignment Segments table configured for the worksheet. And even if managers can see rows with a status of **Ineligible**, they can't make changes to any values in those segment rows. They also have read-only access to segment rows where the individual's assignment is processed or partially processed and if they have read-only worksheet access.

Here's what else managers can't do when you enable assignment segments for the worksheet:

- Reorder columns, apply filters, or sort rows in the assignment segments table. The table columns appear according to the assignment segments setup.
- Freeze columns in either the detail or the assignment segments table.
- Export the detail table content using the **Export to Excel** icon.
- Include assignment segment content using **Manage in Spreadsheet**.

Related Topics

- Default Display Settings for Workforce Compensation Plan Worksheets
- Options to Configure the Visibility and Access Section
- Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets

Eligibility of Worksheet Assignment Segments

You can use the configured workforce compensation plan or compensation component eligibility when you configure eligibility for assignment segments. Both eligibility configurations use the segment end date to validate if the segment is eligible or not. Or you can load a value in an external data column and map it to the **Eligibility Status** column on the Configure Assignment Segments page. If a row in the assignment segment table has a value in the external data column, the segment status is **Eligible**. If the row is blank, the status is **Ineligible**.

Only the **Refresh Workforce Compensation Data** process or a compensation administrator using the **Administer Workers** task can change segment eligibility. The manager eligibility change action doesn't affect the assignment segment table.

Related Topics

- Workforce Compensation Plan Eligibility
- How Required and Optional Profiles Determine Compensation Eligibility
- Eligibility Profiles of Compensation Components

The Start Workforce Compensation Cycle Process and Assignment Segments

Data has to exist in the external data table before you run the initial **Start Workforce Compensation Cycle** process for a workforce compensation plan. Running the process again won't fill in any missing rows or add new external data rows. You can, however, run the **Reprocess or Add New Plan** process using the **Administer Workers** task. The process gets all assignment segment rows that meet both of these conditions:

- They meet the selected criteria.
- They have an end date between the evaluation period start date of the plan cycle and the process effective date.

When you run the **Start Workforce Compensation Cycle** process, it considers only those external data rows specific to the plan assignments. The rows need to have an end date. And the end date has to be between the evaluation period start date and the HR data extraction date.

The process considers data in the external data table as a part of assignment segments if these conditions are true:

- The end date of the row is between the evaluation period start date and HR data extraction date. Or, the row end date is between the evaluation period start date of the plan cycle and the person's employment termination date. This way the process gets assignment segment rows for terminated workers.
- The date columns use the format **YYYY/MM/DD**.

After you run the **Start Workforce Compensation Cycle** process, you can change certain editable plan configuration settings, including these:

- **Record Type** on the Configure Assignment Segments page
- **Amount Column for Assignment Segments** on the Edit Component dialog box opened from the Configure Compensation Component page

Related Topics

- Basic Process to Configure Worksheet Assignment Segments
- Configure Assignment Segments Options of a Compensation Component

The Refresh Workforce Compensation Data Process and Assignment Segments

To support assignment segments, you can run the **Refresh Workforce Compensation Data** process with one or more of these parameters selected:

- Refresh assignment segments data: Includes updating dynamic columns for assignment segments, the worksheet, and summary totals.
- Re-evaluate assignment segment eligibility.
- Refresh dynamic columns for assignment segments.

When you select **Full Refresh**, you select all assignment segment options.

Before you can refresh assignment segment data, has to exist in the external data table. Also, the **Start Workforce Compensation Cycle** process has to have evaluated it.

You can't delete a segment row and use the refresh process to remove the information. You can use the refresh process to update the worksheet after managers update data. The appropriate segment columns have to have with the **Default value subject to refresh** property selected for the refresh to work.

Related Topics

- Basic Process to Configure Worksheet Assignment Segments

48 Modeling, Reports, Filters, and Plan Analytics

Overview of Modeling in Workforce Compensation Plan Worksheets

Let managers and administrators explore scenarios and align their budgets and compensation allocations with organizational pay practices using worksheet models in their workforce compensation plans. First, you enable the create, update, and apply worksheet actions when you configure worksheet display. Then you set general options and enable model sharing, usage, and allocation methods when you configure modeling. Each method determines the values that managers and administrators can enter in their models, and how the model calculates and applies the results.

For example, you specify whether only administrators or both managers and administrators can access models. You also specify whether managers can create their own models, manage models in the integrated workbook, and how they can share models. For both managers and administrators, you enable model usages that determine how they can apply model results. You can let them apply the results as actual compensation, budget, and target amounts, or a combination of these options.

Numeric Properties

The general properties of numeric columns in models vary depending on where managers and administrators view the model information. For example, model numeric columns on the Model Summary page have properties from the summary table view of the corresponding budget or task worksheet. This includes the **Overall Compensation Amount** summary component columns. Model numeric columns in the detail table have properties from the detail table of the corresponding budget or task worksheet.

Related Topics

- Include Models in Task Worksheets
- General Properties of Worksheet Columns
- Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets
- Performance Considerations for Workforce Compensation Plans
- Allocation Methods in Workforce Compensation Models

Overview of Reports in Workforce Compensation Plans

Let administrators and managers view key information in their workforce compensation plans when you configure reports. For example, give administrators the reports they need to optimize compensation budgets and allocations across their client groups. Give line managers reports with contextual and background information about their people so they can make informed compensation allocations.

You can use delivered reports or add Oracle Transactional Business Intelligence (OTBI) and Oracle Business Intelligence Enterprise Edition (OBIEE) reports. You can add any OTBI and OBIEE reports save in the **shared/custom/HCM/Compensation** folder to a workforce compensation plan. And you can give the reports display names that are meaningful to the plan audience. Removing OTBI and OBIEE reports from the Configure Reports page removes them from only the plan. The source reports remain unaffected.

Tip: Each workforce compensation plan can include up to 25 reports.

Related Topics

- Performance Considerations for Workforce Compensation Plans

Implementor and Line Manager Access to OTBI and OBIEE Reports Used in Workforce Compensation Plans

To view and create Oracle Transactional Business Intelligence (OTBI) and Oracle Business Intelligence Enterprise Edition (OBIEE) reports, implementors need to have the **Compensation Manager** role. To set up workforce compensation plans, they also need the **Compensation Administrator** role.

To view OTBI and OBIEE reports in their workforce compensation plans, line managers at all plan hierarchy levels need the **Compensation Transaction Analysis Duty** role. The delivered **Line Manager** role doesn't inherit this duty role, so you need to create a line manager role that includes the duty role.

Related Topics

- Overview of Reports in Workforce Compensation Plans

Dimensions and Range Increments in Worksheet Models and Plan Reports

Dimensions are attributes that you use to group data in reports for workforce compensation plans. You also use them as criteria when building worksheet models. For example, reports can analyze compensation allocations by country and job dimensions to see how average allocations vary. Models can automatically allocate salary adjustment amounts to people who work in specified country and location dimensions.

You enable the dimensions that have meaning to your organization within the context of the plan when you configure reports. Here are some examples of delivered dimensions:

- Country
- Department
- Years of service
- Performance management rating
- Location

- Job
- Position
- Grade

You can also use delivered job attributes, grade attributes, user-defined worksheet columns, and compensation attributes, to define your own dimensions for reports and modeling criteria.

Range Increments

Instead of showing a separate data point for each person, report graphs and tables and model tables show aggregated data for groups of people. You set compa-ratio, salary range position, years employed, and performance management calculated rating range increments as appropriate for the plan reports and models. For example, you have a plan that uses compa-ratio to group data in increments of 10 percentage points. The plan reports and models group together everyone whose compa-ratio falls between 10 and 20, 20 and 30, 30 and 40, and so on.

Related Topics

- Include Models in Task Worksheets
- Overview of Modeling in Workforce Compensation Plan Worksheets
- Overview of Reports in Workforce Compensation Plans
- Create a Workforce Compensation Model

Overview of Filters in Workforce Compensation Plan Worksheets and Reports

Let managers sort the populations in the worksheets of their workforce compensation plans by configuring filters. For example, you can enable **Alerts**, **Country**, **Department**, **Location**, and **Job** filters. The filters you can enable include 6 job attribute, 3 grade attribute, and 15 text column filters.

You can also enable advanced filters by building relevant conditions that only compensation administrators, or both administrators and plan managers can use. Filter conditions have only the Basic tab, while alerts and dynamic columns also have the Advanced tab.

Related Topics

- Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert
- Overview of Reports in Workforce Compensation Plans

Overview of Landing Page Analytics in Workforce Compensation Plans

You can include analytics for the entire workforce compensation plan at the bottom of the plan page. Be sure that when you make the predefined titles more meaningful for the plan audience, the changes don't exceed 40 characters, including spaces. Here are the five types of analytics you can enable:

Analytic	Description
Average Allocation Amount	A meter gauge analytic available per component that shows the average allocation amount for that component. The percentage is calculated from the total number of individuals that report to the primary plan manager.
Workers Compensated	A meter gauge analytic available per component that shows the percentage of compensated individuals. The percentage is calculated from the total number of individuals that report to the primary plan manager.
Budget Usage	A bar chart showing how much budget remains for the primary plan manager. The budget amount is based on the total budget for the manager.
Manager Submitted	A meter gauge analytic showing the number of subordinate plan managers who have submitted their plan changes for approval. The number is the total number of subordinate managers who report to the primary plan manager, including managers who report indirectly.
Workers Promoted	A meter gauge analytic showing the number of people promoted as a part of the compensation cycle. The number is based on the total number of eligible individuals reporting to the primary plan manager.

Related Topics

- General Structure of Workforce Compensation Plans

49 Validation and Processing

Overview of Plan Validation and Starting the Workforce Compensation Cycle

After you finish the foundation, budgets, worksheets, and models and reports configurations for the workforce compensation plan, you validate the plan. Then you start the compensation cycle.

Validate Plan Setup

To check dependencies among the various plan configurations and make sure that all existing conditions work, use the **Validate** button. Correct any errors listed on the Validation Results page and validate the plan again, repeating as needed until you don't get any errors.

> **Tip:** This validation doesn't include the formulas, payroll elements, eligibility profiles, and other objects linked to the plan.

Start Workforce Compensation Cycle

After you finish validating the plan setup, you build the task worksheets for this plan using the **Start Compensation Cycle** button.

- The first time you run the **Start Workforce Compensation Cycle** process for the plan, you might want to make it a trial run.
- If you have issues with running the process, you may want to include trace statements in the log file.
- If you're using compensation tables in Oracle Transactional Business Intelligence (OTBI), you want to start the **Synchronize Hierarchy** process after the cycle process completes.
- For a thorough test, you might want to include recently terminated workers to check that the various task worksheets show what you expect.

Related Topics

- Eligibility Profile Testing for a Workforce Compensation Plan
- Eligibility Profile Testing for a Compensation Component
- Formula Execution Errors

50 Global Compensation Settings

General and Watchlist Global Settings for Workforce Compensation Plans

You can configure global settings that affect all workforce compensation plans and plan managers. You can override various global settings when you configure workforce compensation plans.

General

You can let managers switch to a subordinate manager and move among that manager's plans. You can also validate country budgets, set how many recently searched managers to display, and enable click-to-edit in task worksheets. And you can include the **Save and Close** button on task worksheets, either as an additional option on the standard **Save** button or beside it. To aid managers with worksheets for different assignments, you can enable up to two assignment differentiators, such as **Job** and **Location**. The differentiators then show in hover text for the plan switcher as well as in plan, budget, and worksheet headers.

Watchlist

You can show managers the number of active budget pools and plans in their watchlists. You can also show them their newly published budgets and newly active plans. And you can set the number of days that the budget and plan information remains in their watchlists.

Global Setting Options for Workforce Compensation Plan Notifications

Here's a full list of the options you can select when you configure global notification settings for workforce compensation plans. You can also select these options when you override the global settings using the **Configure Approvals and Notifications** task. The available options in both tasks depend on the setting.

Notification Option	Description
Notify	Always send notifications, such as when budgets and plans are published or withdrawn, or when changes are approved.
Prompt manager	Send notifications for actions only if the initiating manager selects, such as when plan access changes.
Approval required	Require approval, such as for eligibility changes and worker reassignments.
Disable	Disable notifications so that none are sent, such as when individuals are delegated or removed from delegation.

Notification Option	Description

Related Topics

- Configure Notifications for Workforce Compensation Plan Worksheets

How Workforce Compensation Plan Notifications Work

Here's an explanation of how and when each notification for a workforce compensation plan is sent. The explanation covers who initiates sending the notification, who gets it, and what the recipient can do with it. It also covers when notifications are bypassed. You enable these notifications using the **Configure Global Settings** task. You can override the settings in workforce compensation plans using the **Configure Approvals and Notifications** task.

Notification	Initiating Action	Initiator	Recipient	Actions Available to the Recipient	Condition Causing Bypass of Notification
Budget Published	Manager's plan status changes from **Not Started** to **Budget Available**	Manager who published a budget to subordinate managers	Subordinate manager receiving a published budget amount	Close	None
Worksheet Submitted	Manager's plan status changes to **Submitted**	Primary worksheet manager or switched to manager	Manager one level above the submitter in the plan hierarchy, or the specified alternate approver	Approve Reject	Submitting manager is the highest-level approver in the hierarchy
Worksheet Returned for Correction	Manager's approval status for the plan changes to **Return for Correction**	Higher-level manager, specified alternate approver, or switched manager who returned the subordinate manager's plan	Manager whose plan was returned for correction	Close	None
Worksheet Approved by Higher-Level Manager	Manager's worksheet status changes to **In Approvals**	Higher-level manager or specified alternate approver who approved plan changes using the submit notification, or switched manager who approved the changes in their own plan approval task. The higher-level manager isn't the final approver	Manager whose plan status changed to **In Approvals**	Close	Manager's plan access is **No Access**

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Notification	Initiating Action	Initiator	Recipient	Actions Available to the Recipient	Condition Causing Bypass of Notification
Final Approval Obtained	Manager's plan status changes to **Fully Approved**	Top-level approver or specified alternate approver who approved a subordinate manager's plan changes using the submit for approval notification or the approval action from the worksheet	Manager whose plan is approved and all of their subordinate managers	Close	Manager's plan access is **No Access**
Plan Access Changed	Higher level manager selects **Change Access for All Managers** or **Change Access for Selected Managers** from the worksheet	Manager who changed another manager's plan access	Manager whose plan access was changed	Close	None
Worksheet Withdrawn	Manager clicks **Withdraw Submission**	Primary worksheet manager who previously submitted the worksheet	Approver who received the original worksheet submitted notification from a subordinate manager	Close	None
Budget Withdrawn	Manager clicks **Withdraw All Budgets** or **Withdraw Selected Budgets**	Manager who previously published a budget to a subordinate manager	Subordinate manager for whom a budget amount was previously published	Close	None
Due Date Changed	Manager changes a due date for an individual manager or selects Change Due Date for All Managers on the **Action** menu	Higher-level manager or administrator	Subordinate manager whose worksheet due date changed	Close	None
Worksheet Overridden by Higher Manager	Manager or administrator changes a compensation amount column that another manager supplied, and clicks **Save**	Manager who modified an amount or administrator	Manager or administrator who originally supplied the amount	Close	None
Request for Information	Manager selects one or more managers on the approval task page, and clicks **Request Information**	Manager who requested information	Selected managers	Reply, which opens a dialog box to reply to the sender Close	None
Delegate Worker	Manager selects one or more individuals	Primary worksheet manager	Manager selected to review the individuals	Dismiss	None

Notification	Initiating Action	Initiator	Recipient	Actions Available to the Recipient	Condition Causing Bypass of Notification
	on the worksheet and selects **Delegate Workers** on the **Action** menu			Approve Reject	
Remove Worker Delegation	Manager selects one or more individuals on the worksheet and selects **Remove Delegations** on the **Action** menu	Primary worksheet manager who previously delegated the individuals	Manager who previously delegated the individuals	Dismiss Approve Reject	None

Related Topics

- Global Setting Options for Workforce Compensation Plan Notifications
- Configure Notifications for Workforce Compensation Plan Worksheets

Header and Message Text for All Workforce Compensation Plan Notifications

Here's the header and message text for each notification for a workforce compensation plan. You can enable these notifications using the **Configure Global Settings** task. The notification name identifies the manager action that sends the notification. You can't change the header and message text.

Notification	Header Text	Message Text
Budget Published	Compensation Budget Published for {manager who received the budget} ({budget amount} {currency code})	{manager who published the budget} published a budget to you for the plan {plan name}. You can publish budgets to lower managers or begin allocating compensation.
Worksheet Submitted	Approval of {plan name} for {submitting manager}	{submitting manager} submitted {plan name} worksheet for approval. Review it and take the appropriate approval action.
Worksheet Returned for Correction	Your {plan name} Worksheet is Returned for Correction	{submitting manager} returned your worksheet for correction. Review it, make the necessary changes, and resubmit for approval
Worksheet Approved by Higher Manager	Your {plan name} Worksheet is Approved	Your worksheet was approved by {approving manager}. It is still in the approval process until final approval is obtained.
Final Approval Obtained	{plan name} Worksheet is Fully Approved	Your worksheet has obtained final approval.

Notification	Header Text	Message Text
Plan Access Changed	{plan name} Worksheet Access Was Changed	Your access to the plan and cycle was changed.
Worksheet Withdrawn	{plan name} Worksheet was Withdrawn by {manager name}	{withdrawing manager} withdrew the {plan name} worksheet. {withdrawing manager} will resubmit the worksheet when it is ready for your approval.
Budget Withdrawn	Compensation Budget Withdrawn by {manager name}	{manager name} withdrew your budget for {plan name}. Your worksheet will display a zero available budget.
Due Date Changed	{plan name} Worksheet Due Date Changed	Your due date changed. Submit your worksheet on or before the new due date shown.
Worksheet Overridden by Higher Manager	Your {plan name} Worksheet was Modified by {manager name}	Compensation allocations for one or more of your workers was overridden by {manager name}. View details of the override from the plan worksheet.
Request for Information	Information Request from {manager name} Regarding {plan name}	{manager name} requested additional information about your worksheet. Review the comments and provide a response.
Eligibility Change	Eligibility Change Requested by {manager name} ({worker name})	{manager name} requested to change worker eligibility for the plan or component. Review the request and take the appropriate action
Worker Reassignments	Worker Reassignment Requested by {manager name} ({plan name})	{manager name} requested to reassign the following workers to your worksheet. The reassignment is only effective for the plan and cycle shown and does not affect the manager relationship in worker employment records. Review the request and take the appropriate action
Delegate Worker Used to notify managers only	Workers Added to Your Compensation Worksheet	No predefined text.
Remove Worker Delegation Used to notify managers only	Workers Removed from Your Compensation Worksheet	No predefined text.
Delegate Worker Used when approval is required	Worker Delegation Requested by {0} ({1})	The following workers will be added to your compensation worksheet.
Remove Worker Delegation Used when approval is required	Worker Delegation Removal Requested by {0} ({1})	The following workers will be removed from your compensation worksheet.

Notification	Header Text	Message Text

Related Topics

- Global Setting Options for Workforce Compensation Plan Notifications
- Configure Notifications for Workforce Compensation Plan Worksheets

FAQs

How can I configure the content that appears in the workforce compensation submit for approval notification?

To configure worksheet summary tables, use the **Configure Worksheet Display** task. The setup determines the content in the Compensation Summary, Performance Summary, and Promotions Summary sections of the notification.

To configure the Related Links and Comments sections content, use the **Manage Task Configurations for Human Capital Management** task. You can't configure the Details and Summary sections content.

Related Topics

- How You Define Approvals for Human Capital Management

51 Workforce Compensation Administration Overview

Prepare to Start a Workforce Compensation Cycle

Administering workforce compensation is an iterative process. It involves preparing for the cycle, administering individuals and workforce compensation plans during the cycle, and closing the cycle. Follow these steps to prepare for the cycle. The tasks are in **My Client Groups** > **Compensation** unless otherwise specified.

Step	Task
Identify new features and enhancements released since you last prepared to start a workforce compensation cycle that you want to include in this cycle.	docs.oracle.com > Human Resources > Learn What's New in Your Update
Determine what configuration changes to make to workforce compensation plans based on feedback survey results from the previous cycle.	View Administration Reports Status and Monitoring > Manager Feedback
Assess and update eligibility profiles used in the eligibility configurations for the workforce compensation plans and compensation components.	Eligibility Profiles
Review existing workforce compensation plans and create additional plans for the upcoming compensation cycle, as appropriate. • Create the plan cycle. Plans and cycles share compensation performance ratings and promotions according to the **Performance Rating Date** and **Default Promotion Effective Date** plan cycle dates. If you aren't planning to view and change ratings and promote individuals during the new cycle, set different dates in the new plan cycle configurations. • Validate the hierarchies and default access levels. • Review the corporate currency and currency switching settings. • Validate the plan access. • Update feedback survey and plan information to reflect current language and policies.	Workforce Compensation Plans

Step	Task
• Validate the budget pools and display settings. • Validate the enabled compensation components and make sure that the appropriate component is linked to the plan budget pool. • Validate the performance ratings. Integration with Performance Management is common across plan cycles. This means that people use the same rating model across plan cycles and they see the most recent performance management ratings in the plan worksheets. • Review the remaining worksheets configurations. To view current and revised configurations, use the **Preview** option whenever it's available. • Validate your changes thoroughly and resolve any errors that might affect processing.	
See how the plan and compensation component eligibility affects the plan worksheet populations.	View Administration Reports > Status and Monitoring > Worker Eligibility Details

Administer Individuals and Plans During a Workforce Compensation Cycle

Administering workforce compensation is an iterative process. It involves preparing for the cycle, administering individuals and workforce compensation plans during the cycle, and closing the cycle. Follow these steps to administer individuals and plans during the cycle. The tasks are in **My Client Groups** > **Compensation** .

Step	Administration Report or Task
Validate the global models.	Global Models
Review various plan statuses and monitor plan data: • See how the plan and compensation component eligibility affects the plan worksheet populations. • make sure that there aren't any breaks in the hierarchies for all	Status and Monitoring: • Worker Eligibility Details report • Workers Without Managers report • Alert Summary report • Manager Status report

Step	Administration Report or Task
workforce compensation plans active during the compensation cycle. • Review and address alerts for all workforce compensation plans active during the compensation cycle. • Track the progress of submitted changes through the approvals process for all workforce compensation plans active during the compensation cycle.	
Make sure that allocations fall within compensation policies and any defined targets for all workforce compensation plans active during the compensation cycle. This includes any defined target amounts and ranges as well as pay equity rules.	Compensation Analysis reports
Monitor budget pools for all workforce compensation plans active during the compensation cycle.	Budget Consumption Report
Review and address and performance rating and promotion issues for all workforce compensation plans active during the compensation cycle.	Promotions and Performance reports
Refresh workforce compensation data for all workforce compensation plans active during the compensation cycle, at the determined intervals and for the determined refresh options. The process updates existing worksheet data for the specified workforce compensation plan and cycle. You might need to run it if you let salary changes happen outside the workforce compensation cycle, or if the HR data had many changes.	Task: Run Batch Processes > Refresh Workforce Compensation Data Supporting report: Batch Process Monitoring > Refresh Workforce Compensation Data Process
Determine if or when to start the cycle to evaluate new assignments for a specific workforce compensation plan active during the compensation cycle.	Report: Batch Process Monitoring > Start Compensation Cycle Process Supporting task: Run Batch Processes > Start Workforce Compensation Cycle
Monitor the apply model process if you let managers create and apply models for workforce compensation plans active during the compensation cycle. Monitoring is especially important when worksheet population sizes might be larger than the configured batch limit.	Report: Batch Process Monitoring > Apply Model Process Supporting task: Workforce Compensation Plans > Configure Models

Step	Administration Report or Task
Monitor individuals who were reprocessed or added to a new plan manually, for any processing issues.	Batch Process Monitoring > Reprocess or Add New Plan Data

Close a Workforce Compensation Cycle

Administering workforce compensation is an iterative process. It involves preparing for the cycle, administering individuals and workforce compensation plans during the cycle, and closing the cycle. Follow these steps to close the cycle. The tasks are in **My Client Groups** > **Compensation** .

Step	Task
Confirm that all primary managers for the workforce compensation plan submitted their plan changes and the changes are approved.	View Administration Reports > Status and Monitoring > Manager Status report
Release centrally managed and stored compensation change statements to managers and then individuals. Reduce transfer errors for changes to the workforce compensation plans by refreshing workforce compensation data before transferring changes to HR. You should also refresh data if you let salary changes happen outside the workforce compensation cycle or the HR data had many changes. Transfer workforce compensation data to HR. You can transfer data by compensation type, such as elements, salary, stock, performance ratings, and promotion. You can also use different HR actions with each transfer and transfer data for specific populations using inclusion criteria. **Tip:** Changes that you make to an individual's HR data using the Administer Workers task apply to only that assignment, plan, and cycle. They don't transfer back to HR. To make the changes permanent, you need to change the data in Global Human Resources.	Run Batch Processes: • Process Workforce Compensation Change Statements • Refresh Workforce Compensation Data • Transfer Workforce Compensation Data to HR

Step	Task
Track transferred workforce compensation data and resolve any errors. To get an overall view of the processed assignments and assignments remaining to process, you can use the **Consolidated Posting Summary** report.	View Administration Reports > Data Processed reports
Close the workforce compensation cycle for each plan by setting the **Cycle Status** to **Closed**.	Active Plans

52 Workforce Compensation Batch Processes to Start a Compensation Cycle and Refresh Data

Start Workforce Compensation Cycle and Synchronize Hierarchy Processes

To build the worksheets that make up the specified workforce compensation plan for the specified cycle, you run the **Start Workforce Compensation Cycle** process.

Eligibility, Including People with Employment Termination Dates

To determine which employment records to evaluate for eligibility, the start cycle process uses these plan configurations:

- Employment records specified in the plan details
- Eligibility determination date set in the plan cycles

It then uses the eligibility criteria configured at the plan and compensation component levels to evaluate the relevant employment records and determine eligibility. To narrow the employment records used in the eligibility evaluation, set population filters, such as **Country** and **Legal Employer** when you start the cycle.

The process includes eligible people with an employment termination date between the eligibility determination and HR data extraction dates, in the cycle. And it uses the employment termination date rather than the HR data extraction date to extract HR data.

Status

For a specific plan and cycle combination, you can set the cycle to either **Administrative** or **Open** the first time you start the cycle. To change the cycle status after that, you need to use the **Active Plans** task. For example, to finalize a plan for a new focal compensation cycle, you start the cycle with **Status** set to **Administrative**. At the time designated by your policies, you use the **Active Plans** task to change the cycle status to **Open**.

Synchronize Hierarchy

To populate the OTBI reports included in the plan configuration, you need to run the **Synchronize Hierarchy** process. You can have the start cycle process run it for you by selecting the **Launch Synchronize Hierarchy process once this process is complete** option. You can also run that process manually, for example, to populate OTBI reports with the most recent plan hierarchy data.

Related Topics

- Workforce Compensation Plan Cycle Dates
- Employment Records to Use in the Compensation Cycle
- Workforce Compensation Plan Eligibility
- Overview of Reports in Workforce Compensation Plans
- Formula Type Is Compensation Person Selection

Plan Not in the Choice List of the Start Workforce Compensation Cycle Process

If you can't see the plan you're looking for in the **Plan** choice list, verify the following:

- The **Configure Plan Access** task for the plan doesn't restrict access for the **Compensation Administrator** role.
- You have the **Compensation Administrator** role or the appropriate security to run the compensation batch processes.

Refresh Workforce Compensation Data Process

To include the most recent changes to person, HR, salary, assignment segment, and terminated worker data, run the **Refresh Workforce Compensation Data** process. Also run this process to re-evaluate eligibility and to refresh plan hierarchies, due dates, currency conversion rates, dynamic columns, alerts, and summary section totals.

Refresh Date

You specify the date the process uses to refresh the data, calculations, and evaluations associated with the selected refresh options.

- **Actual Process Run Date**: Use the system date at the time the process runs for all refreshes, including eligibility.
- **Plan Cycle Dates**: Use the specified eligibility determination date to refresh eligibility and the specified HR data extraction date for all other refreshes.
- **Specific Date**: Use the selected date for all refreshes, including eligibility.

Predefined alerts appear according to the alert type instead of the refresh date. Also, salary metrics associated with a promotion to a new grade, such as new salary ranges and compa-ratio, use the promotion effective date. They don't use the refresh date.

To run a onetime refresh, you can select any of these refresh dates. For example, you want people to use recently updated assignment segment data. You can use any refresh date to specify when to push those changes out to plan managers and other reviewers.

To schedule a recurring refresh, you probably want to use the **Actual Process Run Date** or **Play Cycle Dates** options. For example, you want people to see the most current employment changes, such as terminations and transfers, and summary totals on their worksheets. You schedule a recurring nightly refresh of HR data using the actual process run date because this becomes the system date when the process runs. Each refresh changes by 1 day every time it runs.

Refresh Options

You can select one or more refresh options to process. For many options, when you select one option, you also select interconnected refreshes. For example, if you select **Refresh column defaults**, you automatically select the options to refresh dynamic columns, alerts, and worksheet summary section totals too.

> **Tip:** Typically, manual primary plan manager and worker eligibility changes revert to their original values. You can use the **Administer Workers** task to identify the changes you don't want overridden.

Related Topics

- Workforce Compensation Plan Cycle Dates
- Employment Records to Use in the Compensation Cycle
- Workforce Compensation Plan Eligibility
- Reprocess an Individual or Add Them to a Workforce Compensation Plan and Cycle
- Formula Type Is Compensation Person Selection

Refresh Options for the Refresh Workforce Compensation Data Process

Here's a comprehensive list of the refresh options you can select when you run the **Refresh Workforce Compensation Data** process. Because of the interconnectedness of workforce compensation plan objects and worksheet columns, frequently selecting one option also selects other options.

Option	Description
Full refresh	When you select this option, you also select all other refresh options except the last few. You don't refresh active plan data, currency conversion rates, or terminated worker data using the process date. You do refresh everything else.
Refresh HR data	Refresh all person and HR-related data, except the primary plan manager. Refresh the summary section totals of the plan worksheets and the predefined alerts. Also refresh all alerts and dynamic worksheet columns with the **Refresh Data** triggering event selected.
Refresh base and eligible Salary	Refresh base salary, salary basis, salary range columns, and any related data stored in the workforce compensation tables. This stored data includes base salary frequency, adjusted salary, FTE salary, and compa-ratio. Refresh default values for eligible salary and local currency if using input currency, the summary section totals of the plan worksheets, and the predefined alerts. Also refresh all alerts and dynamic worksheet columns with the **Refresh Data** triggering event selected.

Option	Description
Refresh column defaults	Refresh column defaults for the plan worksheets, the summary section totals of the plan worksheets, and the predefined alerts. Also refresh all alerts and dynamic worksheet columns with the **Refresh Data** triggering event selected. Recalculate eligible salary derived using a formula or dynamic column. Don't override existing column values that aren't from HR and don't have a column default or dynamic calculation defined.
Refresh assignment segments data	Refresh the external data used to configure the assignment segments. Also refresh the dynamic worksheet columns with **Default value subject to refresh** selected.
Refresh primary manager hierarchy	Refresh the primary plan manager and rebuild the corresponding hierarchy. Also refresh the summary section totals of the plan worksheets and the predefined alerts
Refresh secondary manager hierarchy	Refresh the secondary plan manager and rebuild the corresponding hierarchy. Also refresh the predefined alerts.
Refresh other reviewer hierarchy	Refresh the other reviewers and rebuild the corresponding hierarchy. Also refresh the predefined alerts.
Reevaluate eligibility	Re-evaluate the plan-level and component-level eligibility of everyone already included in the plan, which if you track ineligible people, might change their eligibility status. Also refresh the summary section totals of the plan worksheets, and all alerts and dynamic worksheet columns with the **Refresh Data** triggering event selected. If you don't track ineligible people and want to add eligible people to the plan, use the **Start Workforce Compensation Cycle** process.
Reevaluate assignment segment eligibility	Re-evaluate people's eligibility for the assignment segment. Also refresh the dynamic worksheet columns with **Default value subject to refresh** selected.
Reevaluate limited eligibility	Re-evaluate which plan managers have a status of **Limited**. Refresh the summary section totals of the plan worksheets, the predefined alerts, and all alerts with the **Refresh Data** triggering event selected. Also refresh the dynamic worksheet columns with **Default value subject to refresh** selected or the **Refresh Data** triggering event selected.
Refresh due dates	Refreshes due dates set in the plan cycle configuration, including the hierarchy due dates.
Refresh dynamic columns for assignment segments	Refresh the dynamic worksheet columns for assignment segments with **Default value subject to refresh** selected.
Refresh dynamic columns and alerts	Refresh the summary section totals of the plan worksheets and all alerts and dynamic worksheet columns with the **Refresh Data** triggering event selected.
Refresh predefined alerts	Refresh the predefined alerts.
Refresh summary totals	Refresh the period totals in the summary section of the plan worksheets. The refresh includes the total count and eligible counts for all managers and their direct reports.
Refresh terminated worker data using process date	Refresh terminated people's HR data using the batch process date.

Option	Description
Refresh active plan data	Refresh the compensation components and component post as salary option. Also refresh the configuration data of the budget pool for the plan and period. Budget pool data includes status, budgeting style, submit mode, and approval mode.
Refresh currency conversion rates	Refresh the conversion rate data for the plan and period as of the refresh date.
Lock worksheet while the process runs	Prevents people from changing their worksheets and possibly introducing data corruptions, while their worksheets are getting refreshed. If you submit the refresh process without this option selected, people can make changes during the refresh.

Related Topics

- Guidelines to Configure Default Values for the Promotion Effective Date Column
- Option to Track People Ineligible for a Workforce Compensation Plan
- How the Options to Track and Hide Ineligible People Affect Plan Worksheets
- Workforce Compensation Plan Eligibility
- Eligibility Profiles of Compensation Components

Reference

Formula Type Is Compensation Person Selection

To determine the person selected for an associated workforce compensation plan, you can create formulas using the **Compensation Person Selection** formula type. You select the formula when you run these batch processes:

- Start Workforce Compensation Cycle
- Refresh Workforce Compensation Data
- Transfer Workforce Compensation Data to HR

Here's a comprehensive list of the contexts available to this type of formula:

- DATE_EARNED
- EFFECTIVE_DATE
- END_DATE
- START_DATE
- HR_ASSIGNMENT_ID
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID

- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_ DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_SELECTED	Char	N	Y or N

This sample formula determines if a person is selected for a workforce compensation plan based on their assignment_id.

```
/*******************************************************************
FORMULA NAME : Compensation Selection Formula
FORMULA TYPE : Compensation Person Selection
DESCRIPTION: Assignment_id based selection fast formula
*******************************************************************/
```

```
/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)
/*=========== INPUT VALUES DEFAULTS ENDS======================*/

/*================ FORMULA SECTION BEGIN =======================*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
l_selected = 'Y'
/* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/
if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
(
l_selected = 'N'
)
else
(
l_selected = 'Y'
)
RETURN l_selected
/*================ FORMULA SECTION END =======================*/
```

Related Topics

- Formula Compilation Errors
- Formula Execution Errors
- When do I run the Compile Formula process
- Example of Writing a Fast Formula Using Formula Text

53 Workforce Compensation Batch Process to Transfer Workforce Compensation Data

Transfer Workforce Compensation Data to HR Process

To post base pay adjustments to salary records and element entries to payroll, use the **Transfer Workforce Compensation Data to HR** process. Also use this process to post stock grants to stock history and job, grade, and position changes to the assignment records specified in the plan. Depending on the plan worksheet configurations, some of the transfer details pages might not have any data to transfer.

- To transfer all data, select and configure all relevant element, salary, stock, and promotion details.
- To transfer specific data, configure those details and unselect the details on all other pages except Other Details. For example, to transfer just stock grants, configure the stock details and unselect all element, salary, and promotion details.

You need to post the same types of details for a person, in the same transfer process. For example, post all of Lynn's element details in a single transfer. You can't post some of their element details with one transfer process and the post more element details with a later transfer process. You can post all of their element details with one transfer process and then post all of their stock details with a later transfer process.

View Statistics

You can better understand the raw data related to the plan, cycle, and action you're transferring data for by expanding the View Statistics section. You can see the total, eligible, processed, partially processed, and unprocessed assignments included in the transfer process configuration. You can also see how many assignments are marked to not process and processed assignments for salary, stock, promotion, and elements column.

People Whose Employment Was Terminated

To post single compensation payments and salary adjustments for people whose employment was terminated, run the **Transfer Workforce Compensation Data to HR** process when the compensation cycle is over. Make sure that the plan cycle is still open though. The effective date of the compensation allocations must be before or on the person's employment termination date. The transfer process fails to post any payments and adjustments with an effective date after the person's payroll last standard process date.

Element and Salary Details of Transfer Workforce Compensation Data to HR Process

The salary and element mapping property configurations of the compensation amount columns determine where the **Transfer Workforce Compensation Data to HR** process posts the data. The configurations also determine the step where you configure the transfer details.

If **Post as Salary** is **No**, the changes post to the element entry of the specified payroll element. You include or exclude this data in the transfer using the Element Details page. If none of the compensation amount columns in the plan have this property configuration, then the Element Details page of the transfer process is blank.

If **Post as Salary** is **Yes**, the changes update people's salary records. If the column also has a salary component specified, such as **Merit** or **Cost of Living**, the salary changes include that component for future reference. If none of the compensation amount columns in the plan have this property configuration, then the Salary Details page of the transfer process is blank.

Given that plans can have up to five compensation amount columns, the transfer might have all amounts post to either elements or salary records. Or the transfer might have some amounts post to elements and others to salary records.

Related Topics

- Salary and Element Mapping Properties of Compensation Amount Columns
- Other Details of Transfer Workforce Compensation Data to HR Process
- Transfer Workforce Compensation Data to HR Process

Stock Details of Transfer Workforce Compensation Data to HR Process

To post stock granted in workforce compensation plans to people's stock history, configure the stock details of the **Transfer Workforce Compensation Data to HR** process. People can see their stock history in the Shares section of their Compensation page. Depending on change statement configurations for the plan, they might also be able to see the history in their workforce compensation change statement.

You don't have to set up payroll elements to post stock grants.

Related Topics

- Transfer Workforce Compensation Data to HR Process
- Other Details of Transfer Workforce Compensation Data to HR Process

Promotion Details of Transfer Workforce Compensation Data to HR Process

To post changes to people's jobs, grades, and positions, you configure the promotion details of the **Transfer Workforce Compensation Data to HR** process. If the promotion includes compensation changes, you configure that part of the data transfer on either the Element Details or Salary Details page, or both.

To mark people's compensation changes as part of a promotion, post promotion data in a separate transfer process with the **Promotion** action reason. You still configure any related element and salary details separately from the promotion details.

Related Topics

- Element and Salary Details of Transfer Workforce Compensation Data to HR Process
- Salary and Element Mapping Properties of Compensation Amount Columns
- Other Details of Transfer Workforce Compensation Data to HR Process
- Transfer Workforce Compensation Data to HR Process

Other Details of Transfer Workforce Compensation Data to HR Process

To filter the people whose data you want to transfer to HR, configure the other details of the **Transfer Workforce Compensation Data to HR** process. For example, you can specify to include only the subordinates of specific managers and build a condition that identifies inclusion criteria to apply. You can also use a person selection formula and include people who's changes were approved to a specific level.

> **Tip:** The statistics you can view contain only the people included using the manager hierarchy and worker inclusion criteria. The statistics don't contain people included using the person selection formula or people with changes approved to the specified level.

Workers Approved at Least N Levels Up

To include people's changes in the transfer process, the changes need to be part of **Approved** plans in the specified levels. For example, if you select **1**, the transfer process includes the approved plan changes from the lowest level of the plan hierarchy.

If you select **3**, the transfer process includes the approved plan changes from the three lowest levels of the plan hierarchy. If plan changes for the third level up are **In Approvals**, the transfer process includes only the approved changes for the first two levels. It excludes the changes for the third level because they're pending approval.

Mark Assignments as Processed

Every time you run the transfer process, you need to specify whether to mark assignments as processed.

- **No**: When the process successfully posts the assignments, it process marks them as partially processed. This option lets a future transfer process post changes for other unprocessed details. For example, you transfer only stock details in a process that doesn't mark assignment as processed. Later, for the same people, you transfer salary and promotion details.
- **Yes**: When the process successfully posts the assignments, it marks them as fully processed. To process any further changes, you need to run the **Back Out Workforce Compensation Data** process, for the appropriate transfer process ID. You can find that process ID in various reports available using the **View Administration Reports**.

Related Topics

- Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert
- Configure Approvals for Workforce Compensation Plan Worksheets
- Alternate Approver Table in Worksheet Approval Configuration
- Transfer Workforce Compensation Data to HR Process
- Formula Type Is Compensation Person Selection

54 Workforce Compensation Batch Processes to Back Out and Purge Data, Notify Managers, and Process Change Statement

Back Out and Purge Workforce Compensation Data Processes

To reverse the transfer of data from the workforce compensation plan to HR, you run the **Back Out Workforce Compensation Data** process. For example, you run the process to remove transferred element and salary data so that you can transfer newer changes for processing. When you run the process, you can do a full back out to reverse all of data transfers for the specified plan and cycle. You also do a full back out to reverse all plan hierarchy synchronizations. Or you can reverse the data transferred by a specific process. Various administrative reports that you access using the **View Administrative Reports** task include process IDs for just this purpose. To honor the work that plan managers put into creating models, you can specify that the back out process preserve any plan models.

To remove unneeded data from previous cycles for the specified plan, you run the **Purge Workforce Compensation Data** process. You can select a specific plan and cycle. Or you can provide an HR data extraction date range. The process purges the data from all plans with HR data extraction dates on or during the process start and end dates. After you set the range, the process tells you how many cycles it will purge.

Related Topics

- Transfer Workforce Compensation Data to HR Process

Notify Managers About Workforce Compensation Plan Due Dates and Cycle Status Change Processes

To remind primary plan managers of upcoming due dates, you run the **Notify Managers of Approaching Due Dates** process. You can notify them that due dates are approaching in 15, 10, 5, 4, 3, and 2 days as well as tomorrow and today. You can also notify them that a due date is past. When you configure the notification process, you select a specific due date or multiple due dates, as appropriate to your policies.

To let primary plan managers know that the plan cycle is open or closed, run the **Notify Managers That Cycle Is Open or Closed** process. When you configure the process, you can optionally specify when to communicate plan changes to affected individuals. You can also refine the people affected by the cycle status change using population filters, such as to meet country-specific regulatory requirements. For example, you configure an instance of the process to notify only managers in France that the plan cycle is closed for people in France. And you configure another instance of the process to notify only managers in Germany that the plan cycle is closed for people in Germany.

Related Topics

- Workforce Compensation Plan Cycle Dates
- Overview of Plan Validation and Starting the Workforce Compensation Cycle
- Start Workforce Compensation Cycle and Synchronize Hierarchy Processes

Process Workforce Compensation Change Statements Process

To generate and store the compensation change statements configured for central management, you run the Process Workforce Compensation Change Statements process.

For the specified combination of workforce compensation plan and cycle, you specify the mode of the process, such as **Delete**, **Update Expiration**, or **Replace**. You need to specify visibility, such as only administrators; administrators and managers; or administrators, managers, and workers for the **Update Visibility**, **Replace**, and **New** modes. And for all modes, you need to specify the change statement template the process uses when it runs.

You can also refine the people to generate the compensation change statements for using population filters, such as to meet country-specific regulatory requirements. For example, you configure an instance of the process to generate statements for only people in France. And you configure another instance of the process to generate statements for only people in Germany.

Related Topics

- Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets
- Statement Generation Timing and Output Format for Compensation Change Statements
- Delivery Options for Compensation Change Statements

People Can't See Their Workforce Compensation Change Statements

To let people see their workforce compensation change statements, review and change these settings, as appropriate:

- Enable worker statements using the **Configure Global Settings** task.
- Make the expiration date of the **Process Workforce Compensation Change Statements** process after the process date. Also set **Visibility** to **Administrators, managers and workers**.

55 View Compensation Administration Reports

Compensation and Budget Analysis Reports for Workforce Compensation

A list of reports that analyze compensation and budgets.

Here's a list of reports that analyze compensation and budgets.

Report	How to Use
Compensation Allocations	Review allocations by component. The summary shows allocations by Legal Employer. The details are by person.
Allocations Deviating From Target	Review allocations compared to targets, and percentage deviations from targets. Validate that allocations line up with set targets. Percentage deviation refers to the difference between the Percentage of Eligible Salary and the Target Compensation Percentage, expressed as a percentage of eligible salary.
Allocations Compared to Target Ranges	See amount and percentage of eligible salary allocated, and where awards fall within target ranges. Validate that allocations are within set compensation target ranges.
Budget Consumption	See manager allocations compared to published budgets. Review how managers use their budgets. If you use worker-level budgets, you can see the breakout by country by manager. You can view worker-level budget amounts by country in the Budget Consumption report in View Administration Reports. Click the icon in the Budget Usage by County column to see a window with the amounts listed by country. When you use manager-level budgets, only compensation amounts are listed by country.

Promotions and Performance Reports for Workforce Compensation

A list of reports that summarize performance info.

Here's a list of reports that summarize performance info.

Reports	How to Use
Promotion Summary	See all job, grade, and position changes made during a compensation cycle. Review all promotions. The summary shows changes by grade, job or position.
Performance Rating Summary	See deviations from profile rating model targets for each performance rating. Review performance ratings against the rating profile distribution in the summary.

Reports	How to Use
	Review all ratings for all workers in the details. Use the "No Rating" option to find workers without a rating.

Status and Monitoring Reports for Workforce Compensation

A list of reports that show various compensation statues.

Here's a list of reports that show various compensation statues.

Report	How to Use
Manager Status	See where managers are in the compensation plan's cycle. Identify which managers haven't started their work.
Alert Summary	View all alerts triggered for all workers in this compensation cycle. The summary shows the breakout of alerts by type. The details allow you to refine the list of people by alert type.
Manager Feedback	Review the feedback that managers gave after they submitted their plan changes for a given plan cycle. The report is separated by rating summary, rating details, and then the responses to any configured questions.
Workers Without Managers	Review workers without a worksheet manager that create a gap in the reporting hierarchy. Validate that there're no gaps in the primary hierarchy.
Worker Eligibility Details	Review plan and component level eligibility details of the workers in a compensation cycle. Review how eligibility configuration has affected the plan population. The summary shows 2 graphs: plan eligibility and component eligibility. You can switch between components to review any other configured component level eligibility impacts. The details lets you refine the list of ineligible people by plan or component ineligibility reason.
Worker Statement Actions	Review the actions taken by people on their stored compensation change statements. If no one has taken an action, you're notified of the same and the report does not run. You can view the status of the actions taken by workers on their compensation change statements in employee self-service. To use the report, you must configure the workforce compensation plan to use the centrally managed and stored option for statements and run the Process Workforce Compensation Statements process.

Data Processed Reports for Workforce Compensation

A list of reports that show processing info.

Here's a list of reports that show processing info.

Report	How to Use
Salary Adjustments Posted	See processing details and total salaries adjusted. Review posted salary adjustments. The summary shows the adjustments by Legal Employer and Salary Basis. The details shows them by person. The report generates a batch process ID. You can back out by the ID if there are problems. You can view amounts in the Salary Adjustments Posted report in the same decimal precision as in the worksheet.
Element Entries Posted	Review total allocations posted element entries. The summary shows the adjustments by Legal Employer and payroll element. The details shows them by person. The report generates a batch process ID. You can back out by the ID if there are problems.
Assignment Changes Posted	See job, grade and position changes transferred to core HR by assignment. Review posted assignment changes. The summary shows info by Legal Employer and number of changes. The details shows the changes by person. The report generates a batch process ID. You can back out by the ID if there are problems.
Stock Grants Posted	Review stock grants posted to the Stock table. The summary shows stock posted by Legal Employer and Grant Type. The details shows info by person. The report generates a batch process ID. You can back out by the ID if there are problems.
Posting Error Summary	See cycle close errors that may require manual processing. Review posting errors by batch process ID. The summary shows overall errors by type and the number. The details shows which people had the error.
Consolidated Posting Summary	See an overall view of all posted data. The summary graph shows the number of assignments, number of eligible assignments, how many are fully process or partially processed, how many are pending processing and how many assignments were marked to not process. The details shows what was posted for each batch process ID.
Back Out Cycle Error Summary	See all errors that occurred when backing out data that were transferred to HR. The report is separated by batch process ID.

Consolidated Posting Summary Report Data

Details about what the Consolidated Posting Summary Report contains.

The Consolidated Posting Summary report in the Compensation work area, Administrative Reports task lets you see an overall view of all posted data. Within the report, you are able to see the following for each batch run:

- Process ID
- Run Mode
- Run Start Time
- Who submitted the batch process
- If unhidden, you can see if assignments were marked as "Processed"

For each allocation type (element, promotion, salary, stock) within the batches the following is available:

- How many were posted
- How many failed

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- How many were backed out
- How many had no action taken

This report displays only overall data processed and if assignments are still marked to allow for more processing. You need to review the Posting Error Summary report to find out why data transfers fail.

Exports for Workforce Compensation

A list of reports you can use to export info by parameters you select.

Here's a list of reports you can use to export info by parameters you select.

Report	How You Use
Worksheet Export	See worksheet details exported to a workbook. Export worksheet data using the following parameters: Name, Country, Legal Employer, Business Unit, Department, and Manager Hierarchy.
Generate Real Time Statements	Generate statements for a selected manager hierarchy. After you select a manager hierarchy, you can further refine the population by country. Generate statements all at once for a selected template. This export doesn't take into account any statement criteria in plan setup. It uses criteria within the template. Generated files are only available for the time shown on the page. The system currently sets the availability to 7 days.
Audit Export	Use the following parameters to view and export audit trail data to a workbook from a plan cycle: Person Name, Column Updated, Updated By, Component, Last Update Date, Department, Business Unit, Legal Employer, Country, and Manager Hierarchy. The Advanced option lets you search by Update Date Range instead of Last Update Date. You must enable the "Include in audit trail" column property before you run the Start process. This is the same as with the Audit report on the worksheet.

Batch Process Monitoring for Workforce Compensation

A list of reports you can use to monitor workforce compensation processing.

Here's a list of reports you can use to moni9tor workforce compensation processing.

Report	How to Use
Start Compensation Cycle Process	See history of Start Workforce Compensation Cycle batch process submissions. Use this report to see these details: • Efficiency of the start process ran based on plan setup details and selected parameters. • Number of workers processed and the time taken.

Report	How to Use
	• Number of fast formulas used in plan setup and access additional info. If you enable the start compensation cycle trigger during setup, you can also see how many dynamic calculations are configured.
Refresh Workforce Compensation Data Process	See history of Refresh Workforce Compensation Data batch process submissions. Use this report to see these details: • Efficiency of the refresh process ran based on plan setup details and selected parameters. • Number of workers processed and the time taken. • Number of fast formulas used in plan setup and access additional info. If you enable the refresh data trigger during setup, you can also see how many dynamic calculations are configured.
Reprocess or Add New Plan Data	See history of Reprocess or Add New Plan batch process submissions. Administrators can see details from the Reprocess or Add New Plan Data process. It shows info about the submission itself and if any errors occurred.
Apply Model Process	See history about the Apply Model Process including any submissions done by worksheet managers. Administrators use this report when people have difficulty applying a model through the batch process.

Discrimination Detection Report

You can analyze classes of people who are protected from pay discrimination using the Discrimination Detection report. For example, you can compare compensation for men and women who work in the US.

The report calculates the averages and medians using standard statistical methods.

Summary

You can view calculated values for the entire plan cycle in the Cycle Summary section. By default, the report shows everyone for the entire cycle. But, you can limit the people you're comparing using criteria in the Define Comparison Group section.

You can refine the report in the Protected Class Analysis section to show only people in the comparison group who belong to protected classes, such as gender and age. Most of the values in the table are self-evident. But, the Amount Difference, under the **Variance from Group Average** header, is calculated as follows: Class Average Amount - Group Average Amount.

The class amount is in the table, under the **Compensation for this Group** header. The group amount is in the Cycle Summary section.

Details

Here's the source of some of the data in the table on the Details tab.

Field	Data Source
Discrimination Reporting Code	HR tables
Group Median Amount	Same value as the field in the Cycle Summary section of the Summary tab. It's the same for everyone. You can use it as a reference to compare with the person's Compensation Amount.
Difference from Group	A result of this calculation: Compensation Amount - Group Median Amount.

56 Active Workforce Compensation Plans and Manual Currency Conversion Rates

Active Workforce Compensation Plans

To see the active workforce compensation plans and the status of their plan cycles, use the **Active Plans** task in the Compensation work area. You can also use this task to make these changes for a specific plan cycle:

- Cycle status
- Approval, submit, and withdraw modes
- Plan, component, and budget pool display order
- Currency conversion rates

The changes you make with this task don't apply to the source plan configuration.

Currency Conversion Rates

Plan worksheets can show converted currency amounts and the currency conversion rates. They also use the rates to calculate the amounts in the **Budget Amount - Worker** column. And the **Transfer Workforce Compensation Data to HR** process posts amounts in each person's local currency. Thus, the plan cycle has to include currency conversion rates. If you don't populate the rates using the **Manage Daily Rates** task, you can manually add them on the plan cycle Active Plans page.

When you first run the **Start Workforce Compensation Cycle** process for the plan cycle, the process populates the appropriate workforce compensation table. It loads the daily rates in effect at that date and time. Here's how you can update the table and plan cycle worksheets with the most recent daily rates:

1. On the Active Plan page, Currency Conversion Rates tab, click the **Refresh** button. To update the table with manually added and changed currency conversion rates, save the changes you made on the tab.
2. Run the **Refresh Workforce Compensation Data** process with the **Refresh summary totals** option selected to update the plan cycle worksheets with the most recent rates.

Related Topics

- Add and Change Currency Conversion Rates for a Workforce Compensation Plan Cycle
- Guidelines for Creating Conversion Rate Types
- Overview of GL Currency Rates Upload

Add and Change Currency Conversion Rates for a Workforce Compensation Plan Cycle

All compensation areas, such as salary, individual and workforce compensation, and total compensation, convert values using general ledger daily rates. More specifically, the selected plan cycle uses these daily rates to convert the plan currency to people's local currencies in the enabled worksheets. Here's how you can manually manage specific currency conversion rates for the plan cycle, as needed:

1. On the plan cycle Active Plans page, Currency Conversion Rates tab, add a row. To change an existing rate, skip to step 3.
2. Select the **To Currency** code, such as **CAD - Canadian Dollar**.
3. Enter the conversion rate, such as **1.00695**.
4. Repeat steps 1 -- 3 to add other currencies. Repeat step 3 to change other conversion rates.
5. When you finish, save your changes.
6. Refresh the summary data in the plan cycle worksheets with these changes.

    a. On the Run Batch Processes page, in the **Refresh Workforce Compensation Data** row, click the **Run** icon.
    b. Select the appropriate plan, cycle, and refresh date.
    c. Optionally select a person selection formula.
    d. Select the **Refresh summary totals** option.

57 Administer Workforce Compensation for Workers

Administer Individuals During Workforce Compensation Cycles

To reprocess the data used in workforce compensation for a specific person or add them to a new plan, you use the **Administer Workers** task. The changes that you can make depend on the person's HR data, plan configuration, and whether the person is a manager. Here's what else you can do with the task:

All of the information that you see and the changes you make apply only to the selected person, assignment, workforce compensation plan, and plan cycle. They don't apply for anyone else. They also don't apply for the same person in these situations:

- Review the person's information, such as employment details and any employment terminations.
- Review and change details about the person's budget, compensation, promotion, performance, hierarchies and statuses, and eligibility. You can also review and change user-defined data, notes, alerts, and audit history.
- Review any generated statements or stored statements, and add stored statements.

> **Tip:** To keep any changes you make for the specific person, assignment, plan, and cycle, you can select the Exclude worker from the refresh process option. This option is above the Person Information section of the Administer Workers page with the various tabs, starting with Worker Information and Budget. The refresh processes preserve any changes until you unselect the option.

Related Topics

- Refresh Workforce Compensation Data Process

Reprocess an Individual or Add Them to a Workforce Compensation Plan and Cycle

You can reprocess the data for a specific person, assignment, and effective date used in a specific workforce compensation plan and cycle. For example, someone transferred into or out of your organization after the workforce compensation cycle starts. Now, you want to re-evaluate their eligibility for a specific plan and cycle with an effective date that's the day the transfer was finalized.

1. Use the **Administer Workers** task to search for the person and get a list of their assignments.
2. In the row with the appropriate assignment, click the person's name.
3. On the Administer Workers: Select Plan page, use the **Reprocess or Add New Plan** button to complete any of these tasks:
   - Re-evaluate the person's eligibility for a plan and cycle they're already participating in.

- Evaluate their eligibility for a plan they're already participating in, but a cycle they aren't.
- Evaluate their eligibility for a plan and cycle they aren't participating in.

Related Topics

- Refresh Workforce Compensation Data Process

Administer an Individual's Hierarchies and Access for a Workforce Compensation Plan Cycle

Manager and reviewer responsibilities during a workforce compensation cycle depend on the plan hierarchy and access settings.

- Primary managers finalize and approve workforce compensation plan changes submitted by their subordinate managers. They also finalize their own changes and then submit all of these changes to their approver.
- Secondary managers and other reviewers view plans delegated by the primary manager. Depending on the setup, they can suggest changes to the primary manager. The delegated individuals they review might appear in a different reporting structure than they do in the primary hierarchy.

Sometimes you might need to change the manager or reviewer. For example, the current primary manager is the new line manager for the person as the result of a recent internal transfer. You want the primary manager for this assignment, plan, and cycle to be their previous line manager because that manager knows this person better. Any hierarchy changes don't change the line manager for the assignment.

As needed, you can override the access levels configured for these hierarchies. For example, you want to remove all access for the primary manager. And you do want to give the secondary manager access and let them make changes.

You can change the plan hierarchies and access on the Administer Workers page, Status and Hierarchy tab. The changes apply only for the selected person, assignment, workforce compensation plan, and plan cycle.

> **Tip:** To keep any changes you make for the specific person, assignment, plan, and cycle, you can select the **Exclude worker from the refresh process** option. This option is above the Person Information section of the Administer Workers page with the various tabs, starting with Worker Information and Budget. Future reprocess and refresh processes preserve any changes until you unselect the option. You can also use the **Don’t refresh** option for each relevant hierarchy to let future reprocess and refresh processes update other changes you made.

Related Topics

- Workforce Compensation Plan Hierarchies
- Options to Configure Workforce Compensation Plan Hierarchies

Administer an Individual's Manager and Processing Statuses, and Due Date for a Workforce Compensation Plan Cycle

When you administer an individual, you can administer them and an assignment as being part of a primary manager's plan worksheets for the cycle. You might also administer them in such a way for a secondary manager or other reviewer. And for those individuals who are also a primary manager for the workforce compensation plan and cycle, you can administer their plan and approval statuses.

To change the status for their plan, you use the **Manager Status** field. To see what work the individual's done in their role as primary manager, you can review their action history. You can also change the due date by when they need to submit their plan changes for approval.

Again administering the individual as part of a primary manager's plan worksheets, you can also review and change their processing status. The status indicates how much of the plan changes to the individual's workforce compensation data were transferred to HR.

To review the current statuses and due date, and make any necessary changes, use the Administer Workers page, Status and Hierarchy tab.

Administer an Individual's Eligibility for a Specific Workforce Compensation Plan Cycle

When the **Start Workforce Compensation Cycle** process runs, it determines people's eligibility status for the workforce compensation plan and enabled compensation components. Depending on the refresh and population options you select, the **Refresh Workforce Compensation Data** process re-evaluates their eligibility status. It's also re-evaluated for an individual when you **Reprocess or Add New Plan** for them.

You can manually override the eligibility status for a specific person, assignment, plan, and cycle using the **Administer Workers** task. On the Eligibility tab of the Administer Workers page, you can set the eligibility status for the plan or for specific components. You can also specify that future reprocess and refresh processes can't update your changes.

Related Topics

- Workforce Compensation Plan Eligibility
- How Required and Optional Profiles Determine Compensation Eligibility
- Option to Track People Ineligible for a Workforce Compensation Plan
- How the Options to Track and Hide Ineligible People Affect Plan Worksheets
- Eligibility Profiles of Compensation Components

58 Examples of When to Reprocess an Individual after Starting a Workforce Compensation Plan Cycle

Someone Transfers into an Organization After the Workforce Compensation Cycle Starts

Maria transfers into your organization after the workforce compensation cycle starts and may be eligible for compensation changes.

You use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to evaluate her eligibility for the specified plan and cycle. If the process finds Maria eligible, it adds her to the appropriate primary plan managers' worksheets.

Someone's Data Is Corrected in HR After the Workforce Compensation Cycle Starts

Michael was ineligible for a workforce compensation plan and cycle because of incorrect employment data.

After HR corrects the data, you use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to re-evaluate his eligibility for the specified plan and cycle. If the process finds Michael eligible based on the corrected data, it adds him to the appropriate primary plan managers' worksheets.

Someone Leaves an Organization After the Workforce Compensation Cycle Starts

Janice is eligible for a workforce compensation plan when the cycle starts. A week later, she leaves your organization making her no longer eligible for compensation changes in that plan and cycle.

You use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to re-evaluate her eligibility for the specified plan and cycle. The process finds her ineligible because she isn't in the organization anymore, and removes Janice from her primary plan managers' worksheets.

A Contingent Worker Becomes a Regular Worker After the Workforce Compensation Cycle Starts

Ravi, a contingent worker, isn't eligible for compensation changes when the cycle starts for a specific workforce compensation plan. But Ravi manages people who are eligible. Thus his status in the plan worksheets is **Limited** and he can only propose compensation changes for his subordinates and approve subordinate managers' plan changes. A few weeks later, Ravi becomes a regular worker and should now be eligible for compensation changes.

You use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to re-evaluate his eligibility for the specified plan and cycle. If the process finds him eligible, it changes Ravi's status to **Eligible** in the appropriate primary plan managers' worksheets.

59 Total Compensation Statement Overview

Guidelines to Create Total Compensation Statement Definitions

The statement definition acts as a template and determines the layout and content of the generated statement. The statement definition configures the display of compensation items added to compensation categories.

This topic explains:

- Statement definition approaches
- Reuse of statements and components
- Editing categories
- Statement display flexibility
- Iterative design process

Statement Definition Approaches

You can create statement definitions using either of the following approaches:

- Create the item and category components as you the build statement hierarchy.
- Define the item and category building block components first, and then associate them hierarchically.

The second approach promotes reuse of items and categories across multiple statements.

Reuse of Statements and Components

You can:

- Include multiple legal employers, multiple countries, and multiple currencies in one statement.
- Add compensation items with sources that belong to different legal employers.
- Use the same categories in multiple statements.
- Reuse statement definitions by adding new statement periods and then modify the definition for subsequent periods.
- Duplicate a definition as the starting point for other definitions.

Editing Categories

Edits to categories affect all statement definitions that use that category (as a category or subcategory). This applies whether you make the edits from the Manage Compensation Categories page or the Manage Statement Definitions page. Exception: Compensation category display names are local to the statement definition where you create or edit the name and don't impact the compensation category.

Statement Display Flexibility

Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.

The optional summary page:

- Provides workers with high-level view of their total compensation in graphs and tables
- Displays summed totals of top-level categories included in monetary and nonmonetary sections

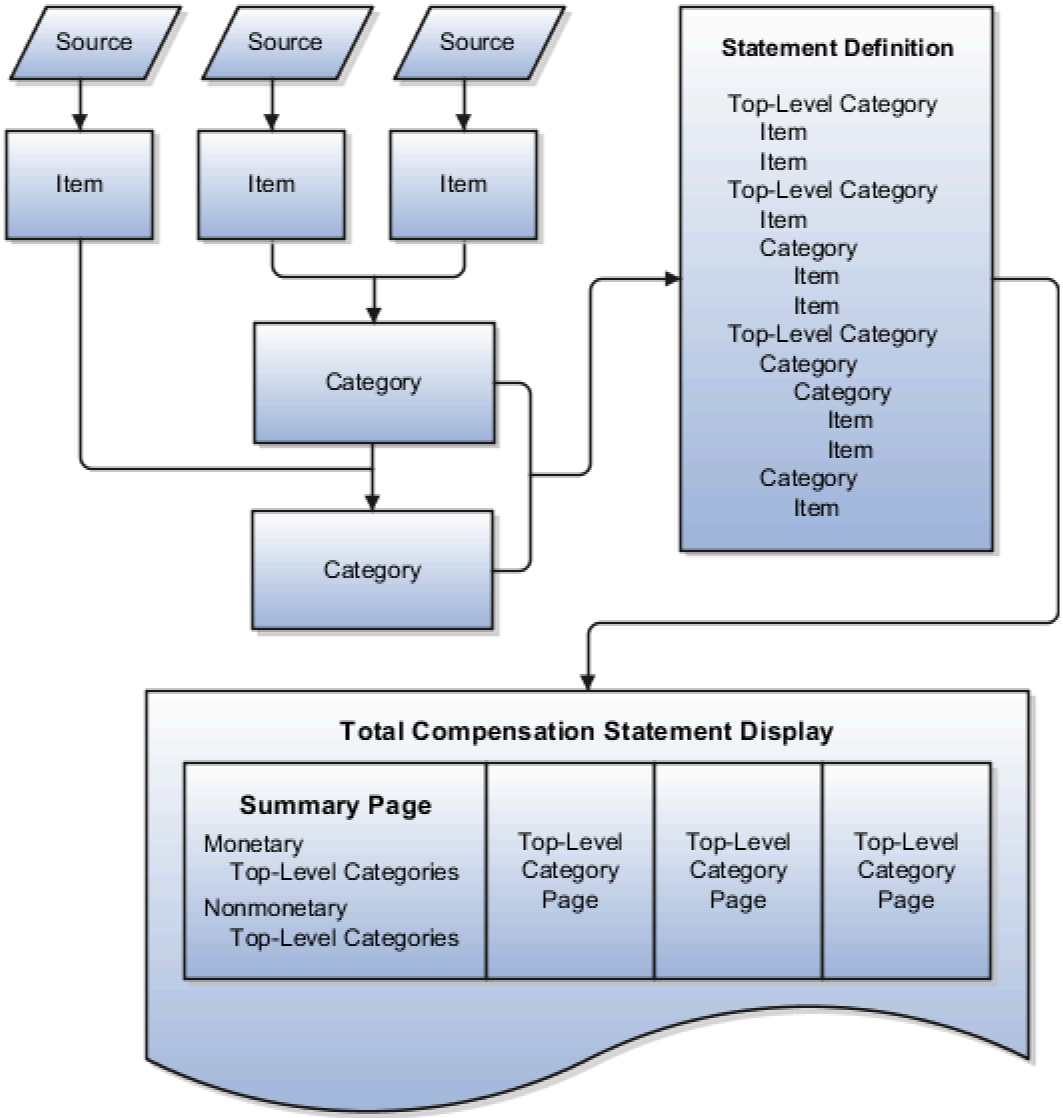
Viewers can drill down to detailed category pages from the summary page or use regional area navigation links, depending on how you configure the category.

Iterative Design Process

Configuring top-level compensation categories and statement definitions is an iterative process. You generate, view, purge, and regenerate your statements multiple times while editing category and statement definition and display options.

Overview of Creating a Total Compensation Statement

Configure the design, content, and delivery of a total compensation statement that includes pay such as base pay, variable compensation, fringe benefits, cost of benefits, and paid time off. The following figure shows the construction of a total compensation statement and how it displays items and categories.



To construct a total compensation statement, application implementors and compensation administrators:

1. Define compensation items that map to sources of estimated or actual amounts paid to workers or costs incurred by the company.
2. Arrange compensation items into categories such as cash compensation, base pay, benefits, or company stock.
3. Assemble categories into statement definitions.
    - Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.
    - Display category details on a single page or enable recipients to drill to details in the statement.
    - Configure optional graphical displays of data, worker instructions, and supplemental information such as compensation policies or benefit plan details.
    - Define periods for which statement data is valid and add an optional welcome message for each period.
4. Configure settings that control statement availability and the default stock price and currency used for estimated values.
5. Generate statements for review by compensation manager.
6. Make statements available for workers to view.

7. Purge unneeded statements and monitor processes with summary and detailed online reports.

To define total compensation statements, use the Total Compensation Statements task list in the Compensation work area.

Related Topics

- Compensation Items and Sources
- Compensation Category Types
- Compensation Categories and Subcategories
- Guidelines to Create Total Compensation Statement Definitions
- Best Practices for Planning Statement Definitions

Display Options in Statements

Options for Display and Layout of Total Compensation Statements

You have many options to control the layout and display of tables and categories in total compensation statements. Additional options control graphic displays, descriptive text, and supplemental information. In general, you configure display options for:

- Category detail pages during category setup
- Top-level categories and the summary page during statement definition setup

The following table describes and compares the display options available when creating or editing compensation categories and compensation statement definitions.

Display Option	Category Setup	Statement Definition Setup
Hide table columns	Yes	Yes: summary page columns
Rename table columns	Yes	Yes: top-level categories only
Configure display of zero or no values	Yes	Yes: top-level categories only
Configure graph display	Yes	Yes: in summary page
Add descriptive text	Yes	Yes: in summary page
Add supplemental text	Yes	Yes: in summary page
Change vertical display order	Yes	Yes: in summary page

Display Option	Category Setup	Statement Definition Setup
Hide regions for graphs or descriptions	Yes	Yes: in summary page
Exclude category from statement summary	No	Yes: top-level categories only
Hide or show estimated amount indicator	No	Yes
Include and hide statement summary page	No	Yes
Include and hide welcome message	No	Yes
Select printable statement options	No	Yes

Related Topics

- Hiding Columns in the Total Compensation Statement: Points to Consider
- Displaying Zero or No Contribution Values in the Compensation Statement: Critical Choices
- Displaying Graphs in Total Compensation Statement: Explained

Best Practices for Hiding Columns in a Statement

You can edit the column properties to hide a column in the category or statement summary page. When you hide a column, the data that the column would display isn't included in summary or detail tables or graphs.

Hiding Columns

You can hide:

- Unused or not applicable columns, such as the worker contribution column in a cash compensation category
- Description columns

You can show a category's row in the statement even when it contains only zero values. However, you should show at least the Description column and enter an explanation, otherwise viewers see only a row of zeros. You can't hide all columns in a category if you configure the category level of details to show all details on a single category overview page.

Options to Handle Display of Statement Categories When Zero or No Values Exist

When you design categories for a statement, you can decide how to handle display when a worker has zero or no values to display during the statement period. You design categories using the Manage Compensation Categories task.

Contribution Values

Zero or no values might occur when a worker:

- Didn't receive any stock options during the period
- Isn't participating in a compensation or benefit plan

The following table describes the zero or no value display options.

Statement Element	Display Options When All Contribution Values are Zero or No Value
Top-level categories page	Do not display category if zero values or no values exist Display category if values are zero; hide if no value exists Always display the category page
Stock subcategory rows	Do not display row when no values exist or values are zeroes Display row if values are zeroes and allow subcategory drill Display and allow drill if historical values are over zero Always display the row and prevent drilling to subcategory Always display the row and allow drilling to subcategory
Items in categories	Do not display row when no values exist or values are zeroes Display row if values are zeroes; hide if no values exist Always display the row

If you decide to display the row or category page with zero or no values, you can optionally compose a statement message to:

- Explain the lack of values
- Call attention to missed opportunities, such as participation in a stock purchase plan

Options for Displaying Graphs in Total Compensation Statement

You can display up to two graphs for each category. If you include a summary page in the statement, you can also include up to two graphs each in the Monetary and Nonmonetary sections of the summary.

For each graph that you decide to display, you must specify:

- Graph type: Pie chart or various types of bar chart
- Columns included in the graph: Worker contributions, company contributions, or both.

Graphs: Restrictions

A graph must not include columns containing:

- Text or dates
- More than one nonmonetary unit of measure
- A combination of monetary and nonmonetary values

For example, a graph that mixes shares of stock, a company car, and fitness membership would not provide clear information.

60 Total Compensation Statement Components

Compensation Items and Sources

Compensation items are the lowest level of compensation detail in the total compensation statement. Map each item to the specific source from which the statement retrieves compensation information. Items can hold monetary, nonmonetary, date, or text values. You can use them across statement definitions.

This topic explains the following significant aspects of compensation items:

- Source type
- Type of compensation and unit of measure
- Estimated values
- Rounding
- Relationship in the statement

Source Type

Using the Manage Compensation Items task, you map compensation items to the source of the compensation to retrieve the compensation information. This table describes the source types and special data entry requirements for each.

Source Type	Description	Additional Data Entry Requirements
Benefit Balance	Compensation such as data obtained from a legacy compensation application entered as a one-time benefit balance.	**Type of Compensation**
Element Entry	Compensation such as salary and bonus earnings retrieved from element entry whose pay period end dates fall within the statement period.	**Legislative Data Group**, **Payroll Element**, and **Input Value**
External Data	Compensation such as data internal to the organization from another system, or data from a third party supplier.	**Record Type**, **Column**, and **Type of Compensation**.
Formula	Create a formula to retrieve compensation information that isn't stored in the other predefined source types.	**Type of Compensation**, nonmonetary **Unit of Measure**, **Rounding Rule**, and **Currency**. (Formula unit or currency overrides item definition)
Payroll Balance	Compensation such as commissions or company-paid taxes retrieved from payroll balance records. We support these payroll balance dimensions:	**Legislative Data Group**

Source Type	Description	Additional Data Entry Requirements
	• Relationship Period to Date • Relationship Year to Date • Term Period to Date • Term Year to Date • Assignment Period to Date • Assignment Year to Date	
Salary	Compensation such as overall salaries.	**Salary Basis**, or all **Salary Basis** from a particular **Legislative Data Group**, or **All Salaries**

Compensation Type and Unit of Measure

The compensation item inherits from the source:

- Default type of compensation, such as monetary or nonmonetary
- Monetary currency
- Nonmonetary unit of measure (UOM)

In some cases you can override the default compensation type and nonmonetary UOM when defining the item.

- If a formula that retrieves compensation also specifies currency or nonmonetary unit of measure, the formula configuration overrides the currency or unit selections in the item definition.
- The currency defined in the benefit balance overrides the currency on the item definition.

Estimated Values

For each item, you can select the Estimated amount option to indicate that this compensation isn't the actual amount paid. In the statement definition, you can specify whether to display the estimated amount indicator for amounts designated as estimated.

Rounding

You can specify how to round nonmonetary amounts.

Items in the Statement Hierarchy

You can't add items to statement definitions directly. To include them on statements, you must add items to a compensation category.

Related Topics

- Overview of Using Formulas

Formula Type for Total Compensation Item

The Total Compensation Item formula determines compensation information that isn't stored in the other predefined item source types. You select the formula when you manage compensation items on the Create or Edit Compensation Items page.

The following contexts are available to formulas of this type:

- DATE_EARNED
- EFFECTIVE_DATE
- END_DATE
- START_DATE
- HR_ASSIGNMENT_ID
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID
- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

The following input variables are available to formula of this type.

Input Value	Data Type	Required	Description
CMP_IV_PERIOD_ID	Char	Y	Period ID
CMP_IV_PERIOD_START_DATE	Date	Y	Statement Period Start Date
CMP_IV_PERIOD_END_DATE	Date	Y	Statement Period End Date

The following return variables are available to formula of this type.

Return Value	Data Type	Required	Description
COMPENSATION_DATES	Date	Y	One to 15 transaction dates delimited by semicolon, maximum 250 characters.

Return Value	Data Type	Required	Description
VALUES	Char	Y	One to 15 transaction values delimited by semicolon, maximum 250 characters. Must be the same number of values as dates.
ASSIGNMENTS	Char	N	One to 15 transaction assignments delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).
LEGALEMPLOYERS	Char	N	One to 15 legal employer IDs delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).
COMPENSATION_DATES1	Date	Y	Second variable for transaction dates from 16 to 30 if limit of 250 characters is exceeded.
VALUES1	Char	Y	Second variable for transaction values from 16 to 30 if limit of 250 characters is exceeded.
ASSIGNMENTS1	Char	N	Second variable for transaction assignments from 16 to 30 if limit of 250 characters is exceeded.
LEGALEMPLOYERS1	Char	N	Second variable for legal employer IDs from 16 to 30 if limit of 250 characters is exceeded.
COMPENSATION_DATES2	Date	Y	Transaction dates from 31 to 45.
VALUES2	Char	Y	Transaction values from 31 to 45.
ASSIGNMENTS2	Char	N	Transaction assignments from 31 to 45.
LEGALEMPLOYERS2	Char	N	Legal employers from 31 to 45.
COMPENSATION_DATES3	Dates	Y	Transaction dates from 46 to 60.
VALUES3	Char	Y	Transaction values from 46 to 60.

Return Value	Data Type	Required	Description
ASSIGNMENTS3	Char	N	Transaction assignments from 46 to 60.
LEGALEMPLOYERS3	Char	N	Legal employers from 46 to 60.

This sample formula returns one date and one value based on the worker ID.

```
/*******************************************************************
FORMULA NAME : Total Compensation Simple Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns one date and one value.
*******************************************************************/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date), CMP_IV_PERIOD_END_DATE (date)
DEFAULT FOR CMP_IV_PERSON_ID IS '-1'
DEFAULT FOR CMP_IV_PERIOD_START_DATE IS '4712/12/31' (date)
DEFAULT FOR CMP_IV_PERIOD_END_DATE IS '4712/12/31' (date)
/*============ INPUT VALUES DEFAULTS ENDS =====================*/

/*=================== FORMULA SECTION BEGIN =================*/
COMPENSATION_DATES = '2005/01/01'
VALUES = '500.00'

ASSIGNMENTS = to_char(get_context(HR_ASSIGNMENT_ID,-1))

RETURN COMPENSATION_DATES, VALUES, ASSIGNMENTS

/*================ FORMULA SECTION END =======================*/
```

This sample formula returns multiple variables.

```
/*******************************************************************
FORMULA NAME : Total Compensation Multi Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns multiple variables.
*******************************************************************/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date) , CMP_IV_PERIOD_END_DATE (date)
/*=========== INPUT VALUES DEFAULTS ENDS =====================*/

/*================= FORMULA SECTION BEGIN =================*/

COMPENSATION_DATES = '2009/01/01;2009/02/01;2009/03/01'
COMPENSATION_DATES1 = '2009/07/01;2009/08/01;2009/09/01'
COMPENSATION_DATES2 = '2009/10/01;2009/11/01;2009/12/01'
COMPENSATION_DATES3 = '2009/10/01;2009/11/01;2009/12/01'

VALUES = '200.00;200.00;300.00'
VALUES1 = '300.00;500.00;500.00'
VALUES2 = '500.00;500.00;600.00'
VALUES3 = '600.00;600.00;700.00'

/* Returns only first two assignment */
ASSIGNMENTS = ';1234567890;1234567890'
ASSIGNMENTS1 = '1234567890;1234567890;1234567890'

/* Returns last two assignments */
ASSIGNMENTS2 = ';1234567890;1234567890'
```

```
/* Returns first and last assignments */
ASSIGNMENTS3 = '1234567890;;1234567890'


LEGALEMPLOYERS = '0123456789;;0123456789'
LEGALEMPLOYERS1 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS2 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS3 = '0123456789;0123456789'

RETURN
 COMPENSATION_DATES,VALUES,COMPENSATION_DATES1,VALUES1,COMPENSATION_DATES2,VALUES2,COMPENSATION_DATES3,VALUES3,ASSIG
GALEMPLOYERS,LEGALEMPLOYERS1,LEGALEMPLOYERS2,LEGALEMPLOYERS3

/*================ FORMULA SECTION END =======================*/
```

Related Topics

- Formula Compilation Errors
- Formula Execution Errors
- When do I run the Compile Formula process
- Example of Writing a Fast Formula Using Formula Text

Compensation Category Types

The compensation category type determines the table columns and general layout of the category page in the total compensation statement, as well as whether the category can include subcategories. This topic explains the category types and provides an example of a user-defined category.

Types

The following table shows the category types with default column and configuration details.

Category Type	Default Columns	Configurable
• Benefits • Cash Compensation • Savings • Retirement	• Worker contributions • Employer contributions • Description	• Add compensation items • Nest categories within the category as subcategories • Hide columns that don't apply
Time Off	• Type of time off • Monetary value of the time off • Accrued balance	• Edit column labels • Configure category table row names as links to more information • Can't nest categories as subcategories
Stock History	Select columns of data from the database table that stores workers' stock details	• Select which types of stock to include in the category • Alter which columns are hidden or only available optionally in statement view menu

Category Type	Default Columns	Configurable
		• Edit column labels • Can't nest categories as subcategories
Other	Same basic structure as the Cash Compensation or Benefits category type	You can use it for any type of compensation
User-Defined	Specify the number of columns, up to five, that you want to include in the category	• Configure column labels • Select compensation items for the table rows • Can't nest categories as subcategories

User-Defined Category Example

You might use the user-defined category type to display information about commissions by including columns, such as:

- Sales target
- Units sold
- Percentage over target
- Percentage under target
- Commission amount

Related Topics

Compensation Categories and Subcategories

Compensation categories display information in tables. Use categories to group similar or related compensation items, such as Cash Compensation, Benefits, Time Off, or Stock History. You can use the same categories in multiple statements. You can also display categories directly on the summary page, or nest them to make subcategories.

Consider the following factors when planning how to group compensation items and categories for display:

- Category type
- Contribution type and unit of measure
- Level of detail

Category Type

Consider these points:

- Category type determines the table columns and general layout of the page in the statement.
- You can't add categories as subcategories to the Stock History, User-Defined, or Time Off category types.
- After you use a category in any statement, you can't change the category type.

Contribution Type and Unit of Measure

The contribution type and unit of measure of the associated items or subcategories determines:

- Category's contribution type (monetary or nonmonetary)
- Category's nonmonetary unit of measure

All items and subcategories within a nonmonetary category must share the same unit of measure.

Level of Detail

When you create a category, you specify how you want to display the category details in the statement.

Select one of these level of detail values:

- Viewers drill into line items to see details
- Viewers see all details on one page

Related Topics

- Compensation Category Level of Detail: Critical Choices
- Hiding Columns in the Total Compensation Statement: Points to Consider
- Displaying Zero or No Contribution Values in the Compensation Statement: Critical Choices
- Displaying Graphs in Total Compensation Statement: Explained

Options to Display Category Details in a Compensation Statement

Use the Manage Compensation Categories task in the Compensation work area to specify how to display the category details in the statement. Select from two level of display options, depending on category type and design preference.

Viewers Drill Into Line Items to See Details

Provide links from a high-level category page that drill down to specific details for each item or subcategory row in the category.

Example: You can create a Benefits category that displays high-level information for different health benefits, such as:

- Medical
- Dental
- Life Insurance

To see the details of each row in the category, such as medical, viewers can drill into the row to a separate details page.

Viewers See All Details on One Page

Display the full detail of the category's content on a single page in the statement. For example, you can create a Bonus category that displays the amount of different bonuses (such as new hire and quarterly) as rows on the category page.

If you select to show all details on a single page:

- The name column doesn't show in the statement for rows in the category.
- You can't hide all columns in the category.
- You can't add subcategories to these category types: Benefits, Cash Compensation, Savings and Retirement, or Other. However, you can add subcategories to these category types if the level of detail enables drilling to see details.

It's best not to show all details on a single page for recurring information.

Best Practices for Planning Statement Definitions

Consider these statement elements and options when you plan how many different total compensation statement definitions to create and the presentation of content in each:

- Statement audience
- Statement definition details
- Statement periods

Statement Audience

You can create different statement definitions for different statement audiences. Use the following two methods, individually or in combination, to limit the statement audience:

- Attach an eligibility profile to the statement on the Statement Options tab.

  Example: Within a business unit, you create separate statement definitions for individual contributors and executive level workers by:

  a. Creating eligibility profiles that differentiate between individual contributors and executive workers.
  b. Attaching each eligibility profile to the corresponding statement definition.
- Use the following population filter parameters to specify your audience when you generate statements:
  - Business unit
  - Benefits group
  - Legislative data group
  - Country
  - A person selection formula that you define
  - A single person that you select

Statement Definition Details

Build the statement hierarchy of categories and items appropriate for the audience. Configure table and graphical displays, descriptive text, and supplemental information.

Statement Periods

Configure statements to cover any period of time by specifying start and end dates on the statement definition Periods tab. You can create multiple periods at one time. For each statement period, further specify:

- An optional statement period display name

  Example: Name the period **2011 Annual Statement** rather than the default display of start and end date.
- The date that statements become available to workers
- The conversion rate date for currency conversions
- An optional welcome message.

Total Compensation Statement Options

You can configure an optional summary page, estimated amount indicator, and welcome message for each statement.

Summary Page

On the statement definition Options tab, you can configure the summary page. The optional summary page consists of the following optional features:

- Monetary and Nonmonetary sections, each containing section-level descriptive text, graphs, and tables
- Summary page descriptive text that can include rich text formatting and hyperlinks

  Include placeholder fields for values that vary among workers, such as the first name, a compensation item amount, or work location. These placeholder fields enable you to use the same text for different workers.
- Summary page supplemental information, such as hyperlinks to company policies and resources, which are displayed in a separate window

If you include a graph in the Nonmonetary section, all top-level categories in the nonmonetary summary should share the same unit of measure. You can exclude individual top-level categories from the summary.

Estimated Amount Indicator

Displaying an estimated amount indicator in the statement requires two configuration steps:

- Item definition: When creating compensation items, identify whether the item amounts are estimates.
- Statement definition: On the statement definition Options tab, specify whether to display or hide the indicator that visually denotes amounts as estimated.

Welcome Message

For each statement period, you can compose an optional welcome message on the statement definition Periods tab. In the welcome message you can:

- Personalize the greeting with each worker's name
- Use rich text and include hyperlinks
- Include placeholder fields for values that vary among workers, such as the first name, a compensation item amount, or work location. These placeholder fields enable you to use the same text for different workers.

If included, the welcome message is the first page the worker sees in the statement.

Options to Include Descriptive Text in Compensation Statements

You can include descriptive text in the Welcome, Summary, and Descriptive Text sections of total compensation statements. You can also insert fields into your descriptive text that act as placeholders. When you generate statements for your workers, these fields are replaced with the actual values for each worker.

For example, you can insert the <FIRST_NAME> field, which the generate process then replaces with the worker's first name, such as Marie. Or, you use descriptive text to inform the employee of company-specific information, such as company policies.

Here's a list of fields you can insert as part of the descriptive text. You can access these fields from the **Insert Field** menu on the Descriptive Text tab.

Option	Description
Person Name	Name information, such as <FIRST NAME>, <MIDDLE NAME>, and <LAST NAME>.
Employment	Location information, such as <DEPARTMENT>, <BUSINESS UNIT>, and <EMPLOYER>. Job information such, as <JOB>, <GRADE>, and <POSITION>.
Compensation Item	Compensation item information, such as bonus or car allowance. For example, you can select the <BONUS> compensation item.
Conditional Text	Compensation item information that appears when it meets the conditions that you create. For example, you can build the following condition to show the annual salary derived from the monthly salary: <Most recent [Pay Monthly] * 12 Is not blank) Or (Sum[Pay Monthly] Is not blank)>.
Miscellaneous	Date information, such as <STATEMENT START DATE> and <STATEMENT END DATE>

You can reuse the rich text fields that you define, such as items and conditional text, across your statement definitions.

Related Topics

- Total Compensation Statement Options

Options to Configure Statement Periods and Welcome Message

Using the Statement Definitions Periods tab, you configure statement periods and an optional welcome message for each statement.

Statement Periods

Configure statements to cover any period of time by specifying start and end dates on the Periods tab. You can create multiple periods at one time.

For each statement period, further specify:

- An optional statement period display name

  Example: Name the period 2016 Annual Statement rather than the default display of start and end date.
- The date that statements become available to workers
- The conversion rate date for currency conversions
- An optional welcome message

Welcome Message

For each statement period, you can compose an optional welcome message by clicking the Welcome Message button on the Periods tab. If included, the welcome message is the first page the worker sees in the statement.

In the welcome message you can:

- Personalize the greeting with each worker's name
- Use rich text and include hyperlinks

Options to Configure Statement Eligibility and Summary Page

On the Statement Definition Statement Options tab, configure an optional summary page, eligibility profile, and visibility of the estimated amount indicators.

Summary Page

Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.

The optional summary page provides workers with a high-level view of their total compensation in monetary and nonmonetary sections. Viewers can drill down to detailed category pages from the summary page or use regional area navigation links, depending on how you configure the category.

On the Statement Options tab, configure the following optional features of the summary page:

- Monetary and Nonmonetary sections, each containing section-level descriptive text, graphs, and tables
- Summary page descriptive text that can include rich text formatting and hyperlinks
- Summary page supplemental information, such as hyperlinks to company policies and resources, which are displayed in a separate window

Tip: If you include a graph in the Nonmonetary section, all top-level categories in the nonmonetary summary should share the same unit of measure. You can exclude individual top-level categories from the summary.

Eligibility Profile

Attach an eligibility profile to limit the audience of the statement. The eligibility profile works as a further refinement to statement generation process parameters, such as business unit or legislative data group.

Example: Within a business unit, you create separate statement definitions for individual contributors and executive-level workers by:

1. Creating eligibility profiles that differentiate between individual contributors and executive workers.
2. Attaching each eligibility profile to the corresponding statement definition.
3. Selecting the Business Unit parameter when generating either statement.

Estimated Amount Indicator

Displaying an estimated amount indicator in the statement requires two configuration steps:

- Item definition: When creating compensation items, identify whether the item amounts are estimates.
- Statement definition: On the Statement Options tab, specify whether to display or hide the indicator that visually denotes amounts as estimated.

FAQs

How can I change whether the category displays zero or no values in the statement?

Edit the top-level category only on the Edit Statement Definition page. Or, edit the subcategory and item rows on the Edit Compensation Categories page. Follow these steps:

1. Select the category or item row.
2. Select the zero value display option in the Actions menu.

The **Display Zero Rows** column shows the current setting for each category.

How can I display a hidden column?

Edit the summary table column properties only on the summary page. Or, edit each individual category's column properties on the Edit Compensation Category page. Follow these steps:

1. Click the **Column Properties** button.
2. Select the column from the menu.
3. Update the option to display the column in the statement.

How can I hide or show the welcome message in total compensation statements?

Follow these steps using the Manage Statement Definitions task in the Compensation work area:

1. Select the statement definition and click **Edit**.
2. On the Periods tab, select the button in the **Welcome Message** column.
3. Edit the **Do not display welcome message** option.

How can I change welcome message text in total compensation statements?

Follow these steps using the Manage Statement Definitions task in the Compensation work area:

1. Select the statement definition and click **Edit**.
2. On the Periods tab, select the **Edit** button in the **Welcome Message** column.

Why can't I delete or edit some items?

If the item is in use in a compensation category, you can't delete it. Also, you can't edit some attributes, such as the type of compensation and nonmonetary unit of measure.

Why did the default stock details change?

More than one administrator might have access to these settings. The following tasks use the stock price and currency information:

- View compensation history
- Manage workforce compensation
- Generate total compensation statements

How can I import stock data sent to me by my supplier?

On the Manage Stock Grants page, use the **Prepare Import Spreadsheet** button to generate the stock table spreadsheet. Enter your supplier's data, ensuring that each row contains a unique Grant Date, Grant ID, and Grant Number. Upload the information into the stock table.

Can I reuse a previous year's statement?

Yes. You can reuse an existing statement definition by adding new periods. You might also want to:

- Update the welcome message
- Add or edit the items and categories included
- Hide or update the display of graphs, descriptive text, and supplementary information

Can I correct the definition after workers received statements?

Yes. You can correct the statement definition and regenerate the statements, which makes the newer version available to workers.

What's the difference between total compensation statements and workforce compensation change statements?

Total compensation statements show base and variable pay, fringe benefits, and perks for a specified period of time, typically a year. These statements are available both online and in PDF format. You configure these statements using the **Total Compensation Statement** tasks in the Compensation work area.

Workforce compensation statements show recent changes to base and variable pay. They apply to a statement group, which has RTF templates that can include criteria to identify which people get the template. For example, people in Spanish-speaking countries get the Spanish version of the statement. The workforce compensation plan containing the statement configuration determines the statement content. You configure these compensation change statements for a specific plan using the **Workforce Compensation Plans** task in the Compensation work area.

61 Total Compensation Examples

Create a Bonus Category

This example demonstrates how to create a bonus category that includes a profit sharing bonus, a new hire bonus, and a quarterly bonus. The new hire and quarterly bonus items already exist and are reused in this category.

The following table summarizes key decisions for the Profit Sharing compensation item in this scenario.

Decision to Consider	Item in This Example
What compensation does the item represent?	Profit sharing bonus
What's the source type?	Payroll element
What's the legislative data group?	USA

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What's the category type?	Cash Compensation
Display category details in the statement at what level?	Viewers see all details on one page.
Add items?	Yes: Profit sharing bonus, new hire bonus, and quarterly bonus.
Display graphs? How many? What type?	Yes. Two: Bar and stacked bar.
Hide or edit any columns in the category?	Hide worker contributions because this is a cash compensation category. Edit company contribution column name to make it familiar to workers.

Task Summary

To create the bonus category, complete the following tasks. Use the default values except where otherwise indicated.

1. Create a profit sharing bonus item.
2. Create a bonus category.
3. Attach the item you created along with other existing bonus items.
4. Configure display options.

Prerequisites

1. Create a payroll element named Profit Sharing Bonus using the USA legislative data group.
2. Create the following compensation items using payroll elements in the USA legislative data group:
    - New Hire Bonus
    - Quarterly Bonus

Creating a Compensation Item

Create the compensation item.

1. Click the **Manage Compensation Items** task.
2. Click **Create**.
3. Complete the fields as shown in this table:

Field	Value
Item Name	Profit Sharing Bonus
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Profit Sharing Bonus
Input Value	Pay Value

4. Click **Save and Close**.

Entering Category Details and Adding Items

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

Field	Value
Name	Bonus
Category Type	Cash Compensation

4. Click **Continue**.

5. Select **Viewers see all details on one page** in the **Level of Detail** field.
6. Click **Add Items** three times to add three new rows.
7. Complete the fields for each new row as shown in this table.

Name	Description	Company Contribution (Items)
Profit Sharing	Profit Sharing Bonus	Profit Sharing Bonus
New Hire	New Hire Bonus	New Hire Bonus
Quarterly	Quarterly Bonus	Quarterly Bonus

8. Click **Edit Column Properties** and select the **Your Contribution** column.
9. Select **Do not display in the statement**.
10. Click **OK**.
11. Click **Edit Column Properties** and select the **Company Contribution** column.
12. Enter **Amount** in the **Column Label** field.
13. Click **OK**.

Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
Graph Title	Your Bonuses	How Your Bonuses Add Up
Graph Type	Bar	Bar - stacked
Graph Items	Amount	Amount

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

Related Topics

- Creating a Total Compensation Statement : Worked Example

Create a Benefits Category

This example demonstrates how to create a benefits category that includes medical, dental, vision, disability insurance, and life insurance. The following table summarizes key decisions for the compensation items in this scenario.

Decision to Consider	First Item	Second Item
What compensation does the item represent?	Worker contribution for medical benefit	Company contribution for medical benefit
What is the source type?	Payroll element	Payroll element
What is the legislative data group?	USA	USA

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What is the category type?	Benefits
Display category details in the statement at what level?	Display details of item rows on separate pages that viewers drill to for details.
Add items? (Describe)	Yes: Both worker and company contributions for medical, dental, vision, disability insurance, and life insurance benefits.
Add other categories as subcategories? Describe	No
Display graphs? (No or Yes?) One or two? What type?	Yes. Two: Stacked bar and pie chart.
Hide or edit any columns in the category?	No
Display the row if values are zero in the period?	No

Create items for medical insurance, then create a benefits category and attach the items you created along with eight existing benefits items and configure display options. Use the default values except where otherwise indicated.

Prerequisites

1. Create the following payroll elements using the USA legislative data group.
    - Medical Worker Contribution
    - Medical Company Contribution
2. Create the following compensation items using payroll elements in the USA legislative data group:
    - Dental Worker Contribution
    - Dental Company Contribution
    - Vision Worker Contribution
    - Vision Company Contribution
    - Disability Worker Contribution
    - Disability Company Contribution
    - Life Insurance Worker Contribution
    - Life Insurance Company Contribution

Creating a Compensation Item

Use the default values except where indicated.

1. In the Compensation work area, click **Manage Compensation Items** to open the Manage Compensation Items page.
2. Click **Create**.
3. On the Create Compensation Item page, complete the fields as shown in this table:

Field	Value
Item Name	Medical Worker Contribution
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Medical Worker Contribution
Input Value	Pay Value

4. Click **Save and Create Another**.

5. On the Create Compensation Item page, complete the fields as shown in this table:

Field	Value
Item Name	Medical Company Contribution
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Medical Company Contribution
Input Value	Pay Value

6. Click **Save and Close**.

Entering Category Details and Adding Items

1. In the Compensation work area, click **Manage Compensation Categories** to open the Manage Compensation Categories page.
2. Click **Create**.
3. On the Create Compensation Categories page, complete the fields, as shown in this table.

Field	Value
Name	Benefits
Category Type	Benefits

4. Click **Continue**.
5. On the Create Category page, Table tab, select **Viewers drill into line items to see details** in the **Level of Detail** field.
6. Click **Add Items** five times to add five new rows.
7. Complete the fields for each new row, entering a name and description of the category row and selecting compensation items for each contribution column in the category, as shown in this table.

Name	Description	Your Contribution (Items)	Company Contribution (Items)
Medical	Amounts reflect your coverage.	Medical Worker Contribution	Medical Company Contribution
Dental	Amounts reflect your coverage.	Dental Worker Contribution	Dental Company Contribution

Name	Description	Your Contribution (Items)	Company Contribution (Items)
Vision	Amounts reflect your coverage.	Vision Worker Contribution	Vision Company Contribution
Disability Insurance	LTD provides income protection.	Disability Worker Contribution	Disability Company Contribution
Life Insurance	Life insurance is a core benefit.	Life Insurance Worker Contribution	Life Insurance Company Contribution

Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
Graph Title	Employee Versus Company Contributions	Total Contribution Comparison
Graph Type	Bar	Pie
Graph Items	Your Contribution, Company Contribution	Your Contribution, Company Contribution

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what is included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

Related Topics
- Creating a Total Compensation Statement : Worked Example

Create a User-Defined Category for Commissions

This example demonstrates how to create a Commissions category using the User-Defined category type. The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What is the category type?	User-Defined
Display category details in the statement at what level?	Viewers see all details on one page.
Add items?	Yes: Sales target, sales revenue, and commissions items for year end.
Display graphs? How many? What type?	Yes. Two bar charts, one for revenue generated and one for commissions earned.
Hide or edit any columns in the category?	Edit column labels.

Task Summary

To create the user-defined category for commissions complete the following tasks. Use the default values except where otherwise indicated.

1. Create a User-Defined category.
2. Attach existing compensation items.
3. Configure display options.

Prerequisites

1. Create the following compensation items:
    - Sales Target Year End
    - Sales Revenue Year End
    - Commission Year End

Entering Category Details and Adding Items

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

Field	Value
Name	Commissions
Category Type	User-Defined
Number of Item Columns	3

4. Click **Continue**.

5. Select **Viewers see all details on one page** in the **Level of Detail** field.
6. Click **Edit Column Properties** and select the **Your Contribution** column.
7. Enter **Sales Target** in the **Column Label** field.
8. Click **OK**.
9. Click **Edit Column Properties** and select the **Company Contribution** column.
10. Enter **Sales Revenue** in the **Column Label** field.
11. Click **OK**.
12. Click **Edit Column Properties** and select the **User-Defined Column 3** column.
13. Enter **Commission** in the **Column Label** field.
14. Click **OK**.
15. Click **Add Items**.
16. Complete the fields for the new row, as shown in this table.

Name	Description	Sales Target (Item)	Sales Revenue (Item)	Commission (Item)
Row 1	Year End Activity	Sales Target Year End	Sales Revenue Year End	Commission Year End

The **Name** column doesn't show in the statement when the level of detail is configured to display all details on a single page.

Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
Graph Title	Revenue Generated	Commissions Earned
Graph Type	Bar	Bar
Graph Items	Sales Revenue	Commissions

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

Related Topics

- Creating a Total Compensation Statement : Worked Example

Create a Stock History Category

This example demonstrates how to create a stock history category for nonqualified stock options with vesting information. You create a stock history category and configure column visibility and graphs.

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What's the category type?	Stock History
Display category details in the statement at what level?	Viewers see all details on one page.
Display graphs? How many? What type?	Yes. One: Bar.
Hide or edit any columns in the category?	Accept most default column visibility settings. Make some adjustments to visibility of vested share columns and grant number. Edit some column labels for display on the statement.

Task Summary

To create the stock history category, complete the following tasks:

1. Create a stock history category and configure the columns.
2. Configure the display options.

The Stock Details table must contain stock data. Use the default values except where otherwise indicated.

Entering Category Details and Configuring Columns

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

Field	Value
Name	Stock History
Category Type	Stock History

4. Click **Continue**.
5. Select **Non-Qualified Stock Option** in the **Grant Type** field.
6. Edit the column labels and availability of column types, as shown in this table, using the default values of columns not listed.

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Sequence	Column Type	Column Label	Available for Display
1	Original Grant Date	Grant Date	(Use default)
3	Grant Number	(Use default)	Select
10	Original Value at Grant	Grant Value	(Use default)
16	Estimated Market Value of Total Shares	Estimated Market Value	(Use default)
17	Vested Shares	(Use default)	Select
18	Exercised Shares	(Use default)	Select
20	Estimated Gain from Vested Shares	(Use default)	Deselect

Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields, as shown in this table.

Field	Value for the First Graph
Graph Title	Vested Versus Unvested Shares
Graph Type	Bar
Nonmonetary Graph Items	Vested Shares, Unvested Shares

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

Related Topics

- Creating a Total Compensation Statement : Worked Example

Create a Total Compensation Statement

This example demonstrates how to create, generate, and view a total compensation statement that contains two top-level categories, one for cash compensation and one for stock.

The statement definition is for individual contributors whose salaries are quoted on an annual basis. The categories added as subcategories were created for other statement definitions and are reused in this definition. The following table summarizes key decisions for the compensation item in this scenario.

Decision to Consider	Item in This Example
What compensation does the item represent	Base pay for exempt workers with annual salary
What's the source type?	Payroll element
What's the legislative data group?	USA

he following table summarizes key decisions for the categories in this scenario.

Decision to Consider	Cash Compensation Category	Stock Category
What is the category type?	Cash Compensation	Other
Display category details in the statement at what level?	Display details of item and subcategory rows on separate pages that viewers drill to for details.	Display details of item and subcategory rows on separate pages that viewers drill to for details.
Add items?	Yes: Base pay for exempt workers	Not directly, only through subcategories.
Add other categories as subcategories?	Yes. One: Bonuses Exempts	Yes. Two: ESPP Exempts and Stock History Exempts
Display graphs? How many? What type?	Yes. Two: Bar and stacked bar.	No
Hide or edit any columns in the category?	Hide worker contributions because this is a cash compensation category. Edit subcategory names to make them familiar to workers.	Edit subcategory names to make them familiar to workers.
Display the row if values are zero or no in the period?	No	Display the Employee Stock Purchase Plan row but prevent drilling to details.

The following table summarizes key decisions for the statement definition in this scenario.

Decision to Consider	Statement Definition in This Example
Include which top-level categories?	Cash Compensation and Stock
What is the statement period?	Calendar year 2015 Also create a second annual period to be ready for the next year.
Include welcome message?	Yes. Address recipients by first name.
Include summary page?	Yes
What is the statement audience for eligibility?	Individual contributors whose salaries are quoted on an annual basis
What is the population for statement generation?	Legal employer: Infusion USA

Task Summary

To create, generate, and view a total compensation statement complete the following tasks. Use the default values except where otherwise indicated.

1. Create a compensation item.
2. Create a cash compensation category and add the item and a subcategory.
3. Create a stock category and add subcategories.
4. Create a statement definition.
5. Configure optional eligibility and statement summary page.
6. Generate and view statements.

Prerequisites

1. Create a payroll element named **Base Pay Exempts** that represents base pay earnings for salaried exempt workers in the USA legislative data group.
2. Create the following compensation categories with items:
   - Bonuses Exempts
   - ESPP Exempts
   - Stock History
3. Create an eligibility profile named **IC Annual Salary** that identifies individual contributors who are salaried with annual salary basis.

Creating a Compensation Item

Create the compensation item.

1. Click the **Manage Compensation Items** task.
2. Click **Create**.
3. Complete the fields as shown in this table:

Field	Value
Item Name	Base Pay Exempts

Field	Value
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Base Pay Exempts
Input Value	Pay Value

4. Click **Save and Close**.

Creating a Cash Compensation Category

Create a cash compensation category and attach the base pay item you created along with two existing cash categories with items.

1. Enter category details and add an item.
2. Add and configure subcategories.
3. Configure display options.

Creating a Stock Category

Create a stock category and attach two existing stock categories with items.

1. Enter category details.
2. Add and configure subcategories.
3. Configure display options.

Creating a Statement Definition

Create a statement definition and configure the statement table display, periods, and welcome message.

1. Enter statement details and add top-level categories.
2. Configure table display options.
3. Define statement periods and welcome message.

Configuring Optional Eligibility and Statement Summary Page

1. Select the Statement Options tab.
2. In the **Eligibility Profile** field, select **IC Annual Salary**.
3. Click **Configure Summary Page**.
4. In the Monetary Compensation section, select the Table tab and verify the table contents.
5. Select the Graphs tab.
6. Complete the fields, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
Graph Title	Your Total Compensation	How Your Compensation Adds Up
Graph Type	Bar	Bar - stacked
Graph Items	Company Contributions	Company Contributions

7. Click **Save**.
8. Click **OK**.
9. Select the Descriptive Text tab.
10. Enter any text that you want to appear in the summary page specifically related to monetary compensation.
11. Scroll down to the Summary Page Descriptive Text section and expand it.
12. Enter some text, such as: **The summary provides you an overview of your compensation package. Click each category name to view additional details**.
13. Click **Save and Close**.
14. Click **OK**.
15. Click **Finish** to validate the statement.