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# PeopleSoft HCM 9.2: PeopleSoft eCompensation Manager Desktop

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**May 2024**

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# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

### Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
<b>Key+Key</b>	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> key.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.



<b>Typographical Convention</b>	<b>Description</b>
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

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

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

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

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

- USF (U.S. Federal)

- E&G (Education and Government)

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

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## PeopleSoft HCM Related Links

[Oracle Help Center](#)

[PeopleSoft Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[HCM Abbreviations](#)

[PeopleSoft Spotlight Series](#)

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## Contact Us

Send your suggestions to [pssoft-infodev\\_us@oracle.com](mailto:pssoft-infodev_us@oracle.com).

Please include the applications update image or PeopleTools release that you're using.

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## Follow Us

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## Chapter 1

# Getting Started with eCompensation Manager Desktop

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## eCompensation Manager Desktop Overview

eCompensation Manager Desktop provides these features:

- Compensation Cycles

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

- Cycle Roles

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

- Allocate Compensation

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

- Approvals and Delegations Integration

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

- Approve Compensation

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

- Compensation History

Managers can review or verify compensation history (base salary, variable cash, variable non-cash, and stock option) for employees.

- Request Ad Hoc Salary Change

---

**Note:** This salary change transaction (classic version) is replaced by a guided self-service transaction in Fluid. For more information, see “Understanding Guided Self-Service Transactions” (PeopleSoft eProfile Manager Desktop) and “Compensation Details Page” (PeopleSoft eProfile Manager Desktop).

---

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

- Approve Ad Hoc Salary Change

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**Note:** This transaction (classic version) is replaced by the approval functionality in Fluid. For more information, see “Approving Guided Self-Service Transactions” (PeopleSoft eProfile Manager Desktop).

---

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

- View Ad Hoc Change Status

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

- Request Budgeted Salary Change

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

- Approve Budgeted Salary Change

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

- View Budgeted Salary Change Status

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

---

## eCompensation Manager Desktop Integrations

eCompensation Manager Desktop integrates with PeopleSoft HCM applications, with other PeopleSoft applications, and with third-party applications. Human Resources shared tables are available to many HCM applications. In addition, data in many HR tables are available to any PeopleSoft application that is set up to subscribe to the published messages. The eCompensation Manager Desktop business processes integrate with these PeopleSoft applications:

- PeopleSoft HCM.
- PeopleSoft Stock Administration.
- PeopleSoft ePerformance.
- PeopleSoft Global Payroll.
- PeopleSoft Payroll for North America.
- PeopleSoft Payroll Interface.

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

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

---

## eCompensation Manager Desktop Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID [2342162.1](#)) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

### Related Links

Application Fundamentals



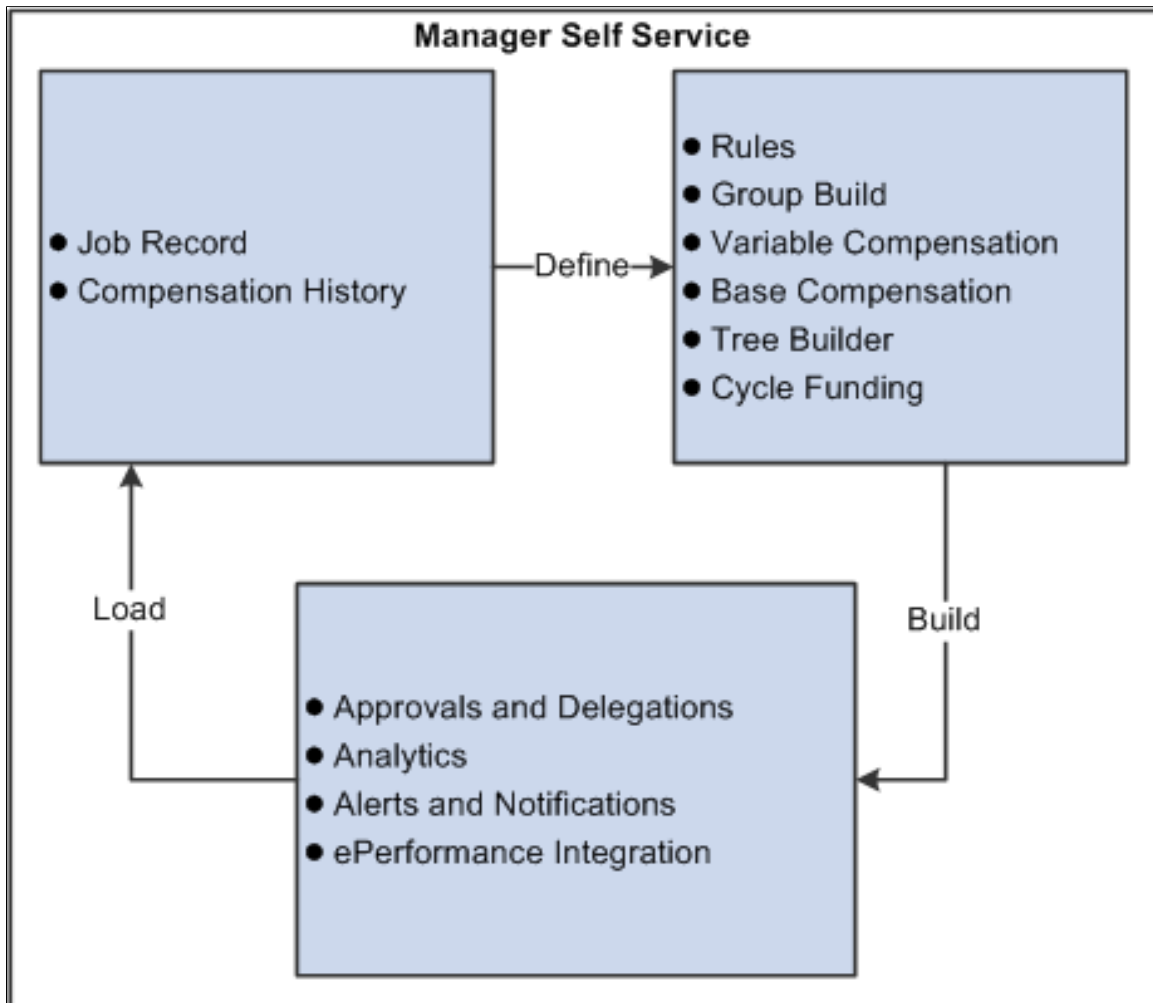


# Understanding Compensation Cycles

## Compensation Cycles in eCompensation Manager Desktop

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

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



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

- Define base compensation.

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

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

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- Define eligible compensation groups using PeopleSoft Group Build.
- Define cycle funding.
- Specify the approval and delegation process that will be used.
- Use summary analytics to review the compensation data contained in the cycle.
- Maintain alerts and notifications.
- Make sure ePerformance document types have been defined if the cycle is applying ePerformance integration (optional).

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

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- Run the Load Salary Updates and Awards process.

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

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### Related Links

“Setting Up Group Definitions” (Application Fundamentals)

“Setting Up Group Security” (Application Fundamentals)

“Updating Salary Information” (PeopleSoft Human Resources Administer Workforce)

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## Salary Plans for Workforce Administration

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

Before you can use the eCompensation Manager Desktop business process, you need to set up the control tables that support it. You define your salary plans, grades, and steps on a series of control tables. At each level, you define parameters such as review rating scale and currency.

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

Define each salary plan with a unique ID on the Define Salary Plan page. For each salary grade, you may set up salary steps with pay components and their compensation values and currency on the Salary Step Components page. The system uses salary structures to establish default compensation packages. For this reason, you can access the same salary plan setup pages through the Workforce Administration menu.

### Related Links

“Setting Up Salary Plans, Grades, and Steps” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

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## Groups

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

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

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

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

### Related Links

“Understanding Group Build” (Application Fundamentals)

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## Trees

This topic discusses:

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

## How Trees are Defined

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

- An applicable tree structure definition.

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

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

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

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

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

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

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

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

Also, please note that any department tree used must accurately reflect the actual direct hierarchy that defines which departments should appear in the Direct Reports and Indirect Reports sections on the [Allocate Compensation Page](#) and [Manage Cycle Transactions Page](#). Specifically, department nodes must not skip levels on the tree.

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See [Building Trees](#).

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

In this scenario the Tree Builder only provides assistance in turning a hierarchy into a tree. You must manually maintain and validate all subsequent tree maintenance within the PeopleTools Tree Manager

application. The tree-building activity, if used, is entirely unrelated to and separate from the compensation cycle.

---

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

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See Also *PeopleTools: Tree Manager*

## Related Links

“Creating and Modifying Security Trees” (Application Fundamentals)

## When Employees are Not Associated to Trees

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

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

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

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

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

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

---

## Salary Plans in Compensation Cycles

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

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

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

---

## Configurable Matrices

This topic discusses:

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

### How the Configurable Matrix is Used

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

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

### Matrix Types Specific to eCompensation Manager Desktop

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

BASECOMP - Base Compensation Adjustments

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

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

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

The system supports these result types and outputs:

<b>Result Type</b>	<b>Output Description</b>
BASECOMP	Funding Percentage
BASECOMP	Minimum Percentage
BASECOMP	Maximum Percentage

**Note:** If configurable matrix is used to calculate funding for salary increases in the compensation cycle definition, only configurable matrices with the BASECOMP type are available for selection.

See

[Define Compensation Cycles - Salary Page](#)

### Related Links

“Understanding Configurable Matrices” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

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## Variable Compensation Plans

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

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

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

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

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

### Related Links

“Understanding Variable Compensation Plan Types” (PeopleSoft Human Resources Manage Variable Compensation)

[Administer Cycle Page](#)

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## Approval Transaction Configuration

This topic discusses:

- Approval transactions.
- Route for approval events.
- HTML email approvals.
- Email notification templates.

---

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

---

**Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

---

### Related Links

“Understanding Approvals” (Application Fundamentals)

## Approval Transactions

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

The events for which the system sends notifications include:

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

---

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

---



## Route for Approval Event

When the approval process is initiated, after submitting the compensation information for the cycle, the system evaluates the next step in the approval process. To route it to the next approver in line, you need to instantiate the Route for Approval event (select **Set Up HCM > Common Definitions > Approvals > Transaction Configuration** or **Enterprise Components > Approvals > Approvals > Transaction Configuration**).

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

PeopleSoft eCompensation Manager Desktop delivers a process ID (*ApproveCompensationProposals*) with setup parameters, definition IDs and email templates to support various events that trigger workflow notifications, including the Route for Approval event.

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

This example displays the Approve Compensation Proposals process on the Configure Transactions page (1 of 3).

### Configure Transactions

Process ID ApproveCompensationProposals

#### Ad Hoc Approver Options

\*Approval User Info View

Ad Hoc User List

#### Notification Options

Send Email Approvals to All

Email Approval User List

\*Delivery Method

Perform Sent-To Security Check

#### HTML Emails

##### Data Source

	Record Name	Level		
1	<input style="width: 100%;" type="text" value="WCS_AWE_DTL_VM"/> <input type="button" value="Q"/>	Header <input type="button" value="v"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input style="width: 100%;" type="text" value="WCS_AWE_HIST_VM"/> <input type="button" value="Q"/>	Support <input type="button" value="v"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

This example displays the Approve Compensation Proposals process on the Configure Transactions page (2 of 3).

Email Processing Package

Email Processing Class

**Allowed Actions**

Approve  
  Deny  
  Pushback  
  Hold  
  Request Information

**User Utilities**

User Utilities Package

User Utilities Path

This example displays the Approve Compensation Proposals process on the Configure Transactions page (3 of 3).

**Events** 1 of 4 | View All

\*Event  \*Level

Menu Name

Approval Component

Page Name

Menu Action

SQL Object Identifier

**Notifications** 1-1 of 1 | View All

#	Participant	User	Email	Worklist	Push	Template Name		
1	<input type="text" value="Requester"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="WCS_APPR_APPROVED"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

PeopleSoft eCompensation Manager Desktop also delivers a transaction configuration (process ID: *AdhocSalaryChange*) to process ad hoc salary change approvals.

See “Configuring Approval Transactions” (Application Fundamentals), [Approving Compensation Allocation Using Fluid Approvals](#) and [Approving Ad Hoc Salary Changes Using Fluid Approvals](#).

## HTML Email Approvals

eCompensation Manager Desktop provides approvers the ability to process compensation proposal approvals directly from emails using the HTML Email Approval feature. When the functionality is enabled for the allocate compensation transaction, the system sends an email notification to approver(s) when a manager submits a compensation proposal for approval. From the HTML email message, the approver can take the appropriate action, such as approve or deny the proposal, by clicking the appropriate link. To help the approver make the most informed decision, summary information of the compensation proposal, such as the name of the compensation cycle, the group for which it is created, total amounts and percentages (proposed and funded) of the proposal, approval history and comments history, is displayed as email content.

The approver can review the status of the approval request by clicking the view compensation cycle approval request link at the end of the email.

---

**Note:** As delivered, the HTML Email Approval feature is disabled for all transactions.

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For more information on configuring HTML email approvals, see “Triggering Email Collaboration” (Approval Framework).

Video: [PeopleSoft 9 2 HTML Email Approvals](#)

## Email Notification Templates

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

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

If you set up the notification process within AWE, the original submitter receives an email notification. Recipients of notifications include requesters, approvers, and reviewers. These users can receive their notifications in the form of worklist entries, email notifications, and push notifications. The PeopleSoft eCompensation Desktop Manager application provides several templates (template name begins with *WCS\_*) for specific AWE events that you can modify for your own specific use. To modify email templates select **Set Up HCM > Common Definitions > Approvals > Generic Templates**.

Here is the suggested text for the email notification template:

<b>Generic Template Definition Field</b>	<b>Text</b>
Subject	Your Compensation Recommendation was submitted.

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

---

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

---

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

This example illustrates the fields and controls on the Generic Template Definition page.

Generic Template Definition
Blackberry Email Responses

**Template:** WCS\_APPR\_APPROVAL\_REQ

**\*Description:**

**Instructional Text:**

**Priority:**

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

**Subject:**

**Message Text:**

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

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

**Note:** The eCompensation Manager Desktop application delivers the Compensation Pending Approval template (WCS\_APPR\_APPROVAL\_REQ).

See “Defining Notification Templates for Approvals” (Application Fundamentals).

## Compensation Cycles

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

This topic discusses:

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

## Administering the Compensation Process

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

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

- Compensation Cycle Definition

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

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

- Cycle Administration

Use the pages within this component to manage the major events during a compensation cycle. This component provides the event steps and prompts for the activities that need to be completed

throughout the compensation cycle. You can also use this component to build your compensation cycles to prepare employees and calculate funding, open cycles to managers to enter proposals, load approved salary updates and awards, close compensation cycles, or cancel cycles to adjust the configuration and rebuild the cycles.

- **Cycle Role Management**

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

- **Plan Funding**

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

- **Transaction Management**

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

## Cycle Statuses

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

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

<b>Cycle Status</b>	<b>Last Updated</b>	<b>User ID</b>
Defined	Last edit date of the Compensation Cycle definition.	Displays the ID of the last user to edit the cycle definition.
Canceled	Date of action.	Displays the ID of the user who executed the cancel cycle.
Build In Progress	Last run date for Cycle Build process.	Displays the ID of the last user who ran the Build/ Calculation process while in the <i>Build In Process</i> status.
Built	Last run date for Cycle Build process.	Displays the ID of the last user who ran the Build/ Calculation process to the <i>Complete</i> status.

<b>Cycle Status</b>	<b>Last Updated</b>	<b>User ID</b>
Opened	Date of action.	Displays the ID of the user who executed an approve funding action.
Closed	Date of action.	Displays the ID of the user who closed the cycle.

## Group Statuses

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

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

## Proposal Statuses

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

<b>Proposal Status</b>	<b>As of Date</b>
Pending	Last run date of Load Salary and Award Update process.



<b>Proposal Status</b>	<b>As of Date</b>
Load Error	Last run date of Load Salary and Award Update process.
Bypassed	Last run date of Load Salary and Award Update process.
Processed	Last run date of Load Salary and Award Update process.

See Also [Understanding the Cycle Load Process](#)

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## Security Considerations

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

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

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

<b>Cycle Status</b>	<b>Workforce Compensation Solutions (WCS) Role</b>	<b>Manager Self-Service Access Allowed?</b>
Defined	All	No
Build In Progress	All	No
Built	Manager Approver Reviewer	No
Canceled	Manager Approver Reviewer	No

<b>Cycle Status</b>	<b>Workforce Compensation Solutions (WCS) Role</b>	<b>Manager Self-Service Access Allowed?</b>
Opened	Manager Approver Reviewer	Yes
Closed	Manager Approver Reviewer	No  <b>Note:</b> If the current date, however, is between the Open to Manager Review date range, the system will allow users to have access.

## Compensation Alerts

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

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

Compensation alert messages are generated by compensation administrators, senior managers, line managers, and compensation processes after certain activities are performed. An alert is simply a message logged during the process, which can be viewed on the Alerts pagelet of the Manager Dashboard, if the compensation-type alerts are selected to be displayed for that pagelet.

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

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

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

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### Related Links

[Defining, Configuring, and Maintaining Compensation Alerts](#)

## Document and Link Configuration

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

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

This example illustrates the fields and controls of the Attachments group box displayed in pages.

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
Goals_2012.doc	Goals of 2012	Manager Only	10/29/2012 2:48:22PM	Betty Locherty	

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

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

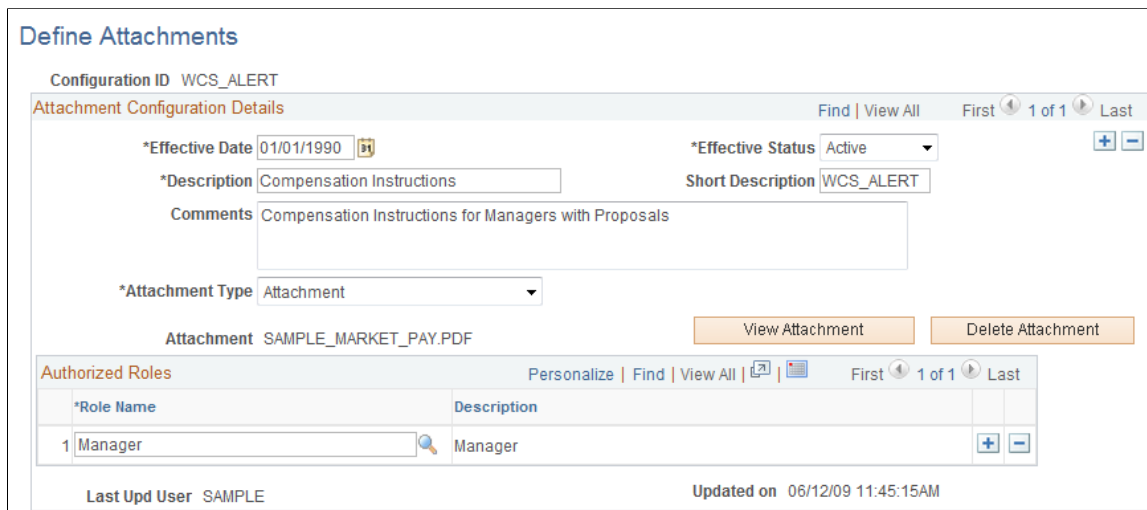
Located in the Attachments folder, the Define Attachments page (select **Set Up HCM > Common Definitions > Attachments**) allows you to specify a configuration for each document or link. To simplify this concept, think of a configuration as the system's identifier for a defined document target. The term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

On the Define Attachments page, PeopleSoft recommends that you use the same ID to set up both the attachment configuration and the compensation cycle ID. Although this is not required, it is beneficial to use the compensation cycle ID as the key identifier for the attachment. For example, if you have an annual merit cycle called *2012 Focal*, a configuration ID of *2012 FOCAL* allows you to quickly identify the attachment that is associated to that particular compensation cycle. This can be helpful if you are administering many compensation cycles that need their own attachments. In addition, the effective date enables you to create multiple versions of the same document over time for the same configuration.

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

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

This example illustrates the fields and controls on the Define Attachments page.



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

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

### Related Links

“Configuring Attachments” (Application Fundamentals)

## Common Elements Used in eCompensation Manager Desktop

<i>Field or Control</i>	<i>Description</i>
<b>Compensation Cycle</b>	Compensation activity that is established for a specific period of time (for example, annual merit increase).
<b>Salary Plan</b>	Salary plans represent individual compensation programs such as merit increases, optional increases, bonuses, or incentive stock options and include specific qualifications and funding.

<b>Field or Control</b>	<b>Description</b>
<b>Variable Compensation</b>	Business process that is set up in PeopleSoft HCM. It enables you to create and manage multiple variable compensation plans. These plans can encompass everything from onetime ad hoc awards to stock options, bonus plans, non-cash incentives, holiday gifts, bonuses, and more.
<b>Cycle Status</b>	The status maintained on the Compensation Cycle definition. These high level values are used with compensation cycles: <i>Defined, Build In Progress, Built, Opened, and Closed.</i>
<b>Group Node</b>	Based on the tree hierarchy defined on your compensation cycle, employees are assigned to a specific node on the tree. This is referred to as the group node. For each group node, direct and indirect report funding information is maintained, as well as the employee proposals. In addition, role access is also assigned at the group node level to control who has the ability to submit, review, and confirm or approval of the proposals for that group.
<b>Group Node Status</b>	A status is maintained for each group node. These values are used for group nodes: <i>Calculated, In Progress, Submitted, Pushed Back, Confirmed, Ready to Load, Completed, and Completed with Errors.</i>
<b>Employee Proposal Status</b>	The system maintains a status for each employee proposal. These values are used with employee proposals: <i>Pending, Bypass, Load Error, and Processed.</i>
<b>Access Role</b>	A role assigned to an employee for a specific group node. The role controls the access and action that can be performed by the employee. These values are used with access roles: <i>Compensation Administrator, Submitter, Reviewer, and Confirmer.</i>
<b>Compensation Administrator</b>	Access role that manages and monitors the status of the compensation cycle.  This role is defaulted to the root node of the tree hierarchy. The person having this role gives them the ability to review and monitor all group nodes. This access role also enables the person to update the group node status to <i>Ready to Load.</i>
<b>Submitter</b>	Access role assigned to a group node that enables an employee to enter proposals for salary changes and awards, then submit those changes to be confirmed or approved by the person with the Confirmer or AWE Approver role.
<b>Reviewer</b>	Access role assigned to a group node that enables an employee to review proposals. The system does not allow employees with the Reviewer role to change or submit proposals for a group node.

<b>Field or Control</b>	<b>Description</b>
<b>Confirmer</b>	Access role assigned to a group node that enables an employee to confirm salary change and award proposals for a group node.
<b>AWE Approver</b>	If you are using the Approval Workflow Engine, this is the derived approver that is defined within that approval framework. It is <i>not</i> the same as the Confirmer access role that is assigned to a group node within the eCompensation Manager Desktop application.

## Chapter 3

# Setting Up and Implementing Compensation Cycles

## Building Trees

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

### Page Used to Build Trees

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Tree Builder Utility Page</u>	HCSC_TREEBLD_RNCTL	Build trees for your eCompensation Manager Desktop application.

### Tree Builder Utility Page

Use the Tree Builder Utility page (HCSC\_TREEBLD\_RNCTL) to build trees for your eCompensation Manager Desktop application.

Navigation:

**Set Up HCM > Product Related > Compensation > Utilities > Tree Builder Utility > Tree Builder Utility**

This example illustrates the fields and controls on the Tree Builder Utility page.

The screenshot displays the 'Tree Builder Utility' page. At the top, there are navigation links for 'Run Control ID COMP\_SUP\_TREE', 'Report Manager', and 'Process Monitor', along with a 'Run' button. The main section is titled 'Hierarchy and Tree Setup' and contains several input fields: '\*Hierarchy Basis' (Supervisor ID), 'Set ID' (empty), '\*Tree Name' (SUPERVISOR\_CHAIN), '\*Effective Date of Tree' (01/01/2012), '\*Description' (Supervisor Report Chain), and '\*Category' (STOCK ADMIN). There is also a checkbox for 'Existing tree-will be replaced'. On the right side, there are fields for 'Tree Structure ID' (SUPERVISOR\_ID), 'Relationship View' (WCS\_SPRVSRID\_VW), and a 'Top Value on Tree' section containing '\*Employee ID' (0002), '\*Employment Record' (0), and 'Root Value' (empty).

Once you create a tree using PeopleTools, do not change the tree structure. If you change the structure, you will not be able to use the existing run control or tree name to build additional trees. The system skips

the steps used to build the new tree and displays a message if you change the structure and the tree has already been built.

<b>Field or Control</b>	<b>Description</b>
<b>Hierarchy Basis</b>	<p>Select a hierarchy structure.</p> <hr/> <p><b>Note:</b> You cannot select <i>Department Tree</i> as the hierarchy basis because PeopleSoft HCM does not have a data model which supports the dynamic building of a department chain. You must create the department tree manually using PeopleSoft Tree Manager.</p> <hr/> <p>See <i>PeopleTools: Tree Manager</i>.</p>
<b>Set ID</b>	<p>Select the set ID that you want to use for the tree you are building.</p> <hr/> <p><b>Note:</b> To activate this field, select <b>Tree Manager &gt; Tree Structure</b>. Select <i>SUPERVISOR_ID</i> and click the <b>Search</b> button. Select the <b>Setid Indirection</b> radio button that appears in the <b>Additional Key Field</b> group box. Click <b>Save</b>. Return to this page and select <i>Supervisor ID</i> as the hierarchy basis. The <b>Set ID</b> field is now available for edit. Fill in the remaining fields and then click <b>Run</b>. Select <b>Tree Manager &gt; Tree Viewer</b> to confirm that the system created the tree.</p> <hr/>
<b>Tree Name</b>	Enter the name of the tree that you are building.
<b>Effective Date of Tree</b>	Select or enter the date that the tree will become effective.
<b>Description</b>	Enter a description for the tree.
<b>Category</b>	Select or enter a category for the tree you are building.
<b>Existing tree-will be replaced</b>	This field is set by the system. If you do not want to replace the tree, you must changes one of the key fields ( <b>Set ID</b> , <b>Tree Name</b> , or <b>Effective Date of Tree</b> ). Otherwise, the system will replace an existing tree that you or someone else in your organization created with the same key values.

## Top Value on Tree

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



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

## Setting Up Prorate and Rounding Rules

This topic provides an overview of rounding rule usage and proration calculation, and discusses how to define prorate and rounding rules.

### Pages Used to Define Prorate and Rounding Rules

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Define Rounding Rules Page</a>	WCS_ROUND_TBL	Set up rounding rules to determine calculated funding amounts for funding adjustments and proposed amounts for variable compensation and salary plans.
<a href="#">Define Prorate Rules Page</a>	WCS_PRORATE_TBL	Set up rules for proration analysis and factor calculation.

## Understanding the Use of Rounding Rules

This section discusses:

- Multiple Currencies
- Rounding approach
- Decimal precision

### Multiple Currencies

eCompensation Manager Desktop has the capability to handle multiple currencies. This allows managers to view data and submit pay and bonus recommendations in their local currencies. However, for the system to manage to an overall budget, amounts entered in a currency that is different than the base

currency that is used for budget purposes are converted to the base currency for the funding process (defined in the cycle definition) and stored in that base currency.

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

## Rounding Approach

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

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

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

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

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

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

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

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

## Decimal Precision

For employees populations with different currencies decimal precision is important in the rounding function. Because funding and proposal amounts are calculated and rounded in their base currency, and are stored in the planning currency in the compensation cycle processing tables, employee populations with mixed currency codes can cause incremental balance issues during conversion.

Without decimal precision, the proposal amount might not post the correct rounded proposal amount. All proposal amounts on summary pages in PeopleSoft eCompensation Manager Desktop are displayed with 2 decimal points despite the fact that some funding and proposal amounts on certain pages can contain up to 6 decimal places. Funding and proposal amounts calculated and entered for employees with different currencies will properly update the organizational funding summaries.

## Understanding Proration Calculation Rules

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

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

See [Administer Cycle Page](#).

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

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

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

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

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

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

## Define Rounding Rules Page

Use the Define Rounding Rules page (WCS\_ROUND\_TBL) to set up rounding rules to determine calculated funding amounts for funding adjustments and proposed amounts for variable compensation and salary plans.

Navigation:

**Set Up HCM > Product Related > Compensation > Compensation Processes > Define Rounding Rules > Define Rounding Rules**

This example illustrates the fields and controls on the Define Rounding Rules page.

The screenshot shows the 'Define Rounding Rules' page. At the top, there is a 'Rounding Rule' field with the value 'HXCMP2' and a '\*Description' field with the value 'QA Rounding Rule 2'. Below these is a 'Notes' text area. A section titled 'Rounding Rules' contains an '\*Effective Date' field set to '01/01/1900' and a '\*Rounding Method' dropdown menu set to 'Nearest', along with a '\*Rounding Increment' field set to '1.000000'. Below this is a 'Currency Specific Rules' table with columns for '\*Currency Code', 'Description', and '\*Rounding Increment'. The table lists five currencies: AUD (Australian Dollar), EUR (euro), GBP (Pound Sterling), INR (Indian Rupee), and JPY (Yen), each with a corresponding rounding increment and plus/minus controls.

<b>Field or Control</b>	<b>Description</b>
<b>Rounding Rule</b>	Identifies the rounding rule. You enter the characters in this field in the Add mode before you access the page. The maximum length is six characters.

### Rounding Rules

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	Select or enter the date the rule becomes effective.

## Rounding Rule Parameters

<i>Field or Control</i>	<i>Description</i>
<b>Rounding Method</b>	Select one of these values to indicate the method with which the system should round values that are input and calculated: <ul style="list-style-type: none"> <li>• <i>Down</i></li> <li>• <i>Nearest</i></li> <li>• <i>None</i></li> <li>• <i>Up</i></li> </ul>
<b>Rounding Increment</b>	Enter the increment by which you want the system to round input amounts. Rounding increments must be <i>1000, 500, 100, 50, 10, 5, 1, 0.1, or 0.01</i> .

## Currency Specific Rules

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

## Define Prorate Rules Page

Use the Define Prorate Rules page (WCS\_PRORATE\_TBL) to set up rules for proration analysis and factor calculation.

Navigation:

**Set Up HCM > Product Related > Compensation > Compensation Processes > Define Prorate Rules > Define Prorate Rules**

This example illustrates the fields and controls on the Define Prorate Rules page.

<b>Field or Control</b>	<b>Description</b>
<b>Proration Rule</b>	Identifies the proration rule. You enter the characters in this field in the Add mode before you access the page. The maximum length is six characters.

### Prorate Rules

<b>Field or Control</b>	<b>Description</b>
<b>Effective Date</b>	Select or enter the date the rule becomes effective.
<b>Frequency</b>	Select one of these values to indicate the frequency with which the system should apply the proration rule: <ul style="list-style-type: none"> <li>• <i>Daily</i></li> <li>• <i>Weekly</i></li> <li>• <i>Monthly</i></li> </ul>
<b>Date Indicator</b>	Use this field only when the proration frequency is set to <i>Monthly</i> . Select one of these values to indicate when the system should use the proration rule: <ul style="list-style-type: none"> <li>• <i>Day of Month</i></li> <li>• <i>End of Month</i></li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Day of the Month</b>	If you select <i>Day of Month</i> in the <b>Date Indicator</b> field, you must also enter the day on which the proration rule is used. This number cannot be greater than 28.

### Prorate Rule Parameters

<b>Field or Control</b>	<b>Description</b>
<b>Include Temporary Time</b>	Select to include the proration rule in calculations involving temporary time. If this check box is deselected, the Regular/Temporary field on the employee's Job Data - Job Information page for which the proration rule is being applied must have an employment status of <i>Regular</i> to be considered eligible.
<b>Include Part Time</b>	Select to include the proration rule in calculations involving part-time pay. If this check box is deselected, the Full/Part field on the employee's Job Data - Job Information page for which the proration rule is being applied must have an employment status of <i>Full-Time</i> to be considered eligible.
<b>Last Increase Date</b>	Select to indicate that the eligibility date for compensation adjustments starts with the date the employee's pay was last increased.  <b>Note:</b> The system uses the <b>Last Increase Date</b> field in conjunction with the fields in the Restart Eligibility Date Action Reasons group box. The last increase date will only restart based on the action reasons that are specified.
<b>Last Hire Date</b>	Select to indicate that the eligibility date for compensation adjustments starts with the date the employee was last hired.
<b>Weekly Minimum Standard Hours</b>	This field is only used when the <b>Include Part Time</b> check box is selected. The system only makes proration calculations on time if the employee is part time and the weekly standard hours are greater than or equal to this number.
<b>Eligible Payroll Statuses</b>	Select the payroll status for which the system should apply the proration rule. You can select multiple statuses by clicking the <b>Add a new row</b> button.

## Restart Eligibility Date Action Reasons

<i>Field or Control</i>	<i>Description</i>
<b>Action and Reason</b>	Select an action and reason to indicate why eligibility should be restarted. The system displays descriptions next to the action and reason that you select. To add multiple actions and reasons, insert additional rows.

## Defining Compensation Cycles

This topic discusses how to define compensation cycles.

### Pages Used to Define Compensation Cycles

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Define Compensation Cycles - General Page</a>	WCS_ECM_CYC_DEF	Enter general parameters for the compensation cycle.
<a href="#">Define Compensation Cycles - Salary Page</a>	WCS_ECM_CYC_SAL	Enter parameters that control the calculations of one or more compensation rate related increases.
<a href="#">Define Compensation Cycles - Awards Page</a>	WCS_ECM_CYC_AWD	Enter parameters for including variable compensation bonus plans in the cycle.
<a href="#">Define Compensation Cycles - Self-Service Page</a>	WCS_ECM_CYC_MSS	Configure behaviors for the self-service components.

### Prerequisites for Defining Compensation Cycles

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

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



- Define rounding rules.
- Define proration rules.

Video: [Image Highlights, PeopleSoft HCM Update Image 31: Compensation Cycle for Variable Compensation](#)

### **Related Links**

[Compensation Cycles in eCompensation Manager Desktop](#)

“Understanding Group Build” (Application Fundamentals)

[Building Trees](#)

“Defining Document Types” (PeopleSoft ePerformance)

“Understanding Configurable Matrices” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)

“Understanding Variable Compensation Plan Types” (PeopleSoft Human Resources Manage Variable Compensation)

[Setting Up Prorate and Rounding Rules](#)

## **Define Compensation Cycles - General Page**

Use the Define Compensation Cycles - General page (WCS\_ECM\_CYC\_DEF) to enter general parameters for the compensation cycle.

Navigation:

- (Classic) **Set Up HCM > Product Related > Compensation > Compensation Processes > Define Compensation Cycles > General**
- (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Configuration > Define Compensation Cycles**

This example illustrates the fields and controls on the Define Compensation Cycles - General page.

<b>General</b>		Salary	Awards	Self-service
Cycle ID	FOCAL_2018		*Cycle Description	Focal 2018 Salary & Bonus
Plan Type	Merit and Variable Comp			
<b>Parameters</b>				
Funding Period Begin	01/01/2018		Cycle Status	Defined
Funding Period End	12/31/2018		Last Update Date/Time	
*Period Description	Focal 2018		Last Update User ID	
*Group ID	FY2018_GRP_01		Fiscal year 2018 Group 01	
<b>Hierarchy</b>				
Tree Set ID			*Tree Effective Date	01/01/2018
*Tree Name	FOCAL_2018_TREE_01			
*Default Manager Role	None			
Tree Node Label	Empl ID and Record			
<b>Cycle Currency</b>				
*Planning Currency	USD		Conversion As Of Date	
Rate Type			Market Rate Index	
<b>Performance Integration</b>				
*Source Data	PeopleSoft ePerformance		Period Begin Date	01/01/2018
Period End Date	12/31/2018		Document Type	K0ANNUAL
Annual Review			Use Rating	REVIEW_RATII

Parameters entered on this page are not specific to any one salary plan or bonus plan. They include funding period begin and end dates, currency conversion settings, employee group parameter, performance integration settings, help URLs and other settings that control manager self-service.

Performance integration settings could impact funding calculation for a salary plan using a configurable matrix.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle ID</b>	<p>Before you access this page enter a short phrase or abbreviation that uniquely identifies the cycle. Typically, you create this identifier when you are adding a new cycle.</p> <hr/> <p><b>Note:</b> Do not use spaces when you create a cycle ID as this can cause problems when embedding a link into an email where this field is used as a key.</p> <hr/>
<b>Cycle Description</b>	Enter a term that best describes the cycle.
<b>Plan Type</b>	<p>Select the plans that the cycle supports. Values are:</p> <p><i>Merit and Variable Comp:</i> (default value) the cycle is used for both merit and variable compensation plans.</p> <p><i>Variable Comp Only:</i> the cycle is used for variable compensation plan only. If this option is selected, the system hides the <a href="#">Define Compensation Cycles - Salary Page</a> and the <i>Salary Grid</i> value of the <b>Display Type</b> field on the <a href="#">Define Compensation Cycles - Self-Service Page</a>.</p> <p>This field is not editable after the cycle is saved.</p>

## Parameters

<b>Field or Control</b>	<b>Description</b>
<b>Funding Period Begin and Funding Period End</b>	<p>Enter the beginning and ending dates of the funding cycle. The <b>Funding Period Begin</b> date must be greater than the <b>Funding Period End</b> date. Typically funding periods are a year in length.</p>
<b>Period Description</b>	Enter a description for the funding period.
<b>Cycle Status, Last Update Date/Time, and Last Update User ID</b>	These fields display the status of the cycle, the date that the cycle was last updated, and the user ID of the person who last updated the cycle.
<b>Group ID</b>	<p>Select the group that defines the population of employees for which the cycle applies.</p> <hr/> <p><b>Note:</b> The Compensation Administrator must have access to the group through standard group security. In addition, this component must be included in the Group Component list. The Cycle Definition component should also be added to the default set within group definition.</p> <hr/>

## Hierarchy

<b>Field or Control</b>	<b>Description</b>
<b>Tree Set ID</b>	If the tree name is based on a setID (for example, department, location, and so on), select one using the <b>Lookup</b> button. If the tree is not based on a setID, this field is not required.
<b>Tree Name</b>	Select the tree that is used as the basis for structuring the organizational hierarchy within the Manager Self-Service component.
<b>Tree Effective Date</b>	Select the effective date of the tree you selected in the <b>Tree Name</b> field.
<b>Default Manager Role</b>	<p>Select a value from the drop-down list menu to indicate the hierarchy that you want the cycle to be based on. Possible values (depending on the tree and effective date specified) include:</p> <ul style="list-style-type: none"> <li>• <i>Position Incumbent (Rpts To)</i> (reports to)</li> <li>• <i>Department Position Nbr</i></li> <li>• <i>Manager ID</i></li> <li>• <i>Supervisor ID</i></li> <li>• <i>None</i> (default value)</li> </ul> <hr/> <p><b>Note:</b> If you do use this field, the Calculation and Build process populates the Cycle Access table with the appropriate employee ID and sets the role to Manager. The Cycle Build process only defaults to the Cycle Access table with Submitter role access, which is based on the Default Manager Role setting. The compensation administrator can enter additional cycle role access.</p> <hr/>
<b>Tree Node Label</b>	Enter a description for the tree node associated with the compensation cycle.

## Cycle Currency

<b>Field or Control</b>	<b>Description</b>
<b>Planning Currency</b>	Select the currency code that you want to use from the currency code table.

<b>Field or Control</b>	<b>Description</b>
<b>Conversion As Of Date</b>	Enter the date that you want the system to convert the currency that you are using for this cycle. The underlying market rate tables must be fixed from the point that compensation is calculated within the cycle.
<b>Rate Type</b>	Select the rate type that you want to use for the cycle.
<b>Market Rate Index</b>	Select a value from the Rate Index table to indicate the index you want the system to use to calculate the conversion of the currency.

## Performance Integration

<b>Field or Control</b>	<b>Description</b>
<b>Source Data</b>	<p>If you are integrating information from eCompensation Manager Desktop with a Performance application, select the appropriate application: Values include:</p> <ul style="list-style-type: none"> <li>• <i>None</i></li> </ul> <p>If you select <i>None</i>, the rest of the fields in this section become unavailable for entry.</p> <ul style="list-style-type: none"> <li>• <i>Other</i></li> </ul> <hr/> <p><b>Note:</b> If you select <i>Other</i>, it is the your responsibility to populate the PS_WCS_EP_APPR table with the performance data that you want to use.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>PeopleSoft ePerformance</i></li> </ul>
<b>Period Begin Date and Period End Date</b>	Enter the date range for performance documents, if the selected source data is <i>PeopleSoft ePerformance</i> or <i>Other</i> .
<b>Document Type</b>	Select the appropriate performance document type, if the selected source data is either <i>PeopleSoft ePerformance</i> or <i>Other</i> .
<b>Use Rating</b>	Select the use rating that you are using in your ePerformance application, if the selected source data is <i>PeopleSoft ePerformance</i> or <i>Other</i> .

## Talent Links

This section is displayed if the **Talent Links** option is enabled on the “Installed Integration Products Page” (Application Fundamentals) for Talent Integration Management.

Talent Integration Management is a licensed solution that integrates two HCM instances on different releases, allowing you to take advantage of Talent Management features that are offered in the newer instance without having to perform a full upgrade. To implement this solution, you must set up full and incremental sync integration between the two HCM environments in order to keep them in sync. The older HCM environment is always the source database for employee data.

<i>Field or Control</i>	<i>Description</i>
<b>Publish Update Transaction</b>	<p>Select to indicate that salary and award update transactions need to be published, rather than updated directly in employees’ job and award data within the newer HCM environment.</p> <p>When selected, update transactions are loaded into a staging table and are published to the older HCM environment by running a process. From within the older system, another process runs to update employees’ job and award data information. Updates in the older system trigger sync transactions to the newer system and keep the two in sync.</p>

## Define Compensation Cycles - Salary Page

Use the Define Compensation Cycles - Salary page (WCS\_ECM\_CYC\_SAL) to enter parameters that control the calculations of one or more compensation rate related increases.

Navigation:

**Set Up HCM > Product Related > Compensation > Compensation Processes > Define Compensation Cycles > Salary**

This example illustrates the fields and controls on the Define Compensation Cycles - Salary page (1 of 2).

General | **Salary** | Awards | Self-service

Cycle ID: FOCAL\_2018      Cycle Description: Focal 2018 Salary & Bonus

**Funding Period**

Begin: 01/01/2018      Description: Focal 2018  
End: 12/31/2018

**Salary Parameters**

Increase Effective Date: 02/15/2019      \*New Hire Eligibility Date: 12/31/2017

**Job Change Rules**

*Job Change Type	Exclude		
Active to Inactive Status	<input checked="" type="checkbox"/>	+	-
Salary	<input type="checkbox"/>	+	-

**Eligible Rate Codes**

*Rate Code	Description		
NAANNL	Default NA Annual	+	-
NAHRLY	Default NA Hourly	+	-

This example illustrates the fields and controls on the Define Compensation Cycles - Salary page (2 of 2).

**Salary Plans**

\*Plan: Merit Increase      \*Plan Sequence: 1

Rounding Rule: KUV001

Use Configurable Matrix      Matrix ID: FY2018\_PERF

Funding Percent:

Minimum Percent:

Maximum Percent:

Discretionary

Default Proposal to Funded

**Proration Parameters**

Use Prorate Exception Table

Proration Rule:

Full Period Start Date:

Earliest Eligible Start Date:

Eligible End Date:

**Action Reasons**

*Sequence	*Action	*Reason	*Display As	Default
1	PAY	MER	Merit Pay	<input checked="" type="checkbox"/>

Parameters entered on this page include increases based on merit, pay adjustment, promotions, and so on. These parameters may include relevant salary rate codes, calculation rule matrices, prorated and rounding rules, and applicable action and reason codes.

**Note:** This page does not appear if the selected plan type on the Define Compensation Cycles - General Page is *Variable Comp Only*.

## Salary Parameters

<i>Field or Control</i>	<i>Description</i>
<b>Increase Effective Date</b>	Enter the date when you want any proposed compensation changes to be effective. This date must be on or after the <b>Funding Period Begin Date</b> .
<b>New Hire Eligibility Date</b>	<p>Enter the date to determine new hires' eligibility for compensation changes. Employees who were hired <i>after</i> this date are ineligible for merit increase. This date must be earlier than the <b>Funding Period End Date</b>.</p> <p>The system is designed to allow customers to filter out employees that have not worked for a minimum period of time prior to the funding period to be considered eligible. For example, you might have a business policy that employees must be employed for at least 6 months to be considered eligible for any form of an increase.</p>

## Job Change Rules

<i>Field or Control</i>	<i>Description</i>
<b>Job Change Type</b>	<p>Select the type or types of employee job change you want the system to track after the snapshot process has run and the cycle is in the Open status.</p> <p>Available values are:</p> <p><i>Active to Inactive Status</i> - HR status of employee is changed to inactive, for example, employee is terminated.</p> <p><i>Currency Code</i> - employee's salary currency code is changed.</p> <p><i>Salary</i> - employee's salary is changed.</p>
<b>Exclude</b>	<p>Select this option for a job change type if you want the Job Change process to zero out funded and proposed amounts for employees who had that job change recorded during the open cycle.</p> <p>If this option is not selected, the Job Change process doesn't do anything to the funded and proposed amounts for employees who had that job change during the open cycle. The manager, after receiving the alert, can then decide what to do with the amounts, for example, reallocate them to other direct reports.</p>



## Eligible Rate Codes

<i>Field or Control</i>	<i>Description</i>
<b>Rate Code and Description</b>	<p>Select the rate code that you want to use for changes to compensation. The system automatically fills in the description after you select the rate code.</p> <hr/> <p><b>Note:</b> The system allows you to add rows to enable you to add multiple rate codes. However, an employee can only have one compensation rate code adjusted during the Compensation Cycle process.</p> <hr/>

## Salary Plans

<i>Field or Control</i>	<i>Description</i>
<b>Plan</b>	Enter a description for the salary plan that you want managers or administrators to see on the Allocate Compensation page or Manage Cycle Transactions page.
<b>Plan Sequence</b>	Enter a number to indicate the order in which you want the system to display salary plans within the self service pages for the compensation cycle.
<b>Rounding Rule</b>	Select the rounding method that you want to use for the salary plan.
<b>Use Configurable Matrix</b>	Select this check box if you plan to use a configurable matrix to calculate funding information. If you select this check box, the system makes the <b>Funding Percent</b> , <b>Minimum Percent</b> , and <b>Maximum Percent</b> fields unavailable for entry.
<b>Matrix ID</b>	<p>Select a configurable matrix that you want to use to drive the funding calculation.</p> <p>Only matrices of the <i>BASECOMP</i> type are available for selection.</p> <p>See “Defining Salary Increase Guidelines Using a Configurable Matrix” (PeopleSoft Human Resources Manage Base Compensation and Budgeting).</p>
<b>Funding Percent</b>	Enter the total funding percent by which you would allow a manager to adjust salaries in their department.

<b>Field or Control</b>	<b>Description</b>
<b>Minimum Percent</b>	Enter the minimum percent by which you would allow a manager to adjust an employee's salary.
<b>Maximum Percent</b>	Enter the maximum percent by which you would allow a manager to adjust an employee's salary.
<b>Discretionary</b>	Select this check box if you want to enable managers to override the calculated funding amount.
<b>Default Proposal to Funded</b>	Select this check box to set the default proposal to the calculated funded amount.

### Proration Parameters

<b>Field or Control</b>	<b>Description</b>
<b>Use Prorate Exception Table</b>	<p>Select this check box if you want to use information from the Prorate Exception (WCS_PRO_EXC_TBL) table in the build process. If there is no entry in the Prorate Exception Table, the build process sets the prorate factor to 1.</p> <hr/> <p><b>Note:</b> If you select this check box, the system makes the <b>Proration Rule</b>, <b>Earliest Eligible Start Date</b>, <b>Full Period Start Date</b>, and <b>Eligible End Date</b> fields unavailable for entry.</p> <hr/>
<b>Proration Rule</b>	Select the proration rule that you want to use for salary increases or adjustments. The values that you are able to select come from the Prorate ID table (WCS_PRORATE_ID).
<b>Earliest Eligible Start Date, Full Period Start Date, and Eligible End Date</b>	<p>Enter the begin and end dates to which the proration period applies. These fields are required if you specify a proration rule. Typically, this period is for the year prior to the funding period.</p> <p>See <a href="#">Understanding Proration Calculation Rules</a>.</p>

### Action Reasons

<b>Field or Control</b>	<b>Description</b>
<b>Sequence</b>	Enter a number to control the order that you want the system to load the action reason for the plan when updates are run.
<b>Action</b>	Select an action from the Action table.
<b>Reason</b>	Select a reason from the Action Reason table.
<b>Display As</b>	Enter a description for the action that you want managers to see when they access the Manager Self-Service page.
<b>Default</b>	Select the action that you want to use as a default on the Manager Self-Service page. You must select only one action for the plan.

### Define Compensation Cycles - Awards Page

Use the Define Compensation Cycles - Awards page (WCS\_ECM\_CYC\_AWD) to enter parameters for including variable compensation bonus plans in the cycle.

Navigation:

**Set Up HCM > Product Related > Compensation > Compensation Processes > Define Compensation Cycles > Awards**

This example illustrates the fields and controls on the Define Compensation Cycles - Awards page.

*Variable Compensation Plan	*Payout Period	*Award Type	*Display As	*Funding Calculation	Discretionary	Default Proposed	Rounding Rule
KUBON2018	2018	Cash	Bonus	Use VC C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	KUV001

Parameters entered on this page include variable compensation plan and payout period, plan type, and budget calculation type. Leave this page blank if the cycle is used for merit plan only.

Bonus awards are always calculated in Variable Compensation. When the compensation cycle build process is run, the system retrieves these calculated awards for the variable compensation plans that are specified on this page, and displays them for employees on the Allocate Compensation page.

## Award Plans

<b>Field or Control</b>	<b>Description</b>
<b>Variable Compensation Plan</b>	<p>Select a plan from the Variable Compensation Plan table.</p> <p>You must specify at least one variable compensation plan if the selected plan type for the cycle is <i>Variable Comp Only</i>.</p>
<b>Payout Period</b>	<p>Select a payout period from the Variable Compensation Payout Period table.</p> <hr/> <p><b>Note:</b> The payout period has to be within the start and end date of the cycle period to be added to the definition.</p> <hr/>
<b>Award Type</b>	<p>Select an award type. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Cash</i></li> <li>• <i>Non-Cash</i></li> <li>• <i>Stock</i></li> </ul> <p>The system derives these default values from the variable compensation plan types:</p> <ul style="list-style-type: none"> <li>• <i>Cash: Discretionary (D), Goal Sharing (G) or Profit Sharing (P).</i></li> <li>• <i>Stock: ISO (I), NSAR (K), NQ (Q), RSA (R) or ISAR (S).</i></li> <li>• <i>Non-Cash: Non-Monetary (N) or Other (O).</i></li> </ul>
<b>Display As</b>	<p>Enter a description for the award plan that you want managers or administrators to see on the Allocate Compensation page or Manage Cycle Transactions page.</p>
<b>Funding Calculation</b>	<p>Select the type of funding calculation that you want the system to use for the variable compensation plan. Values are <i>VC Calc</i> and <i>Manual</i>.</p> <hr/> <p><b>Note:</b> If you select <i>VC Calc</i> the funding is defaulted to the award amounts that are calculated by variable compensation at the employee level. If you select <i>Manual</i> the compensation administrator will have to manually allocate a funding amount for each group node for the variable compensation plan.</p> <hr/>

<b>Field or Control</b>	<b>Description</b>
<b>Discretionary</b>	Select this check box if you want to enable managers to override the calculated funding amount. If you selected <i>Manual</i> as the Funding Calculation method for the VC plan, you must select this check box.
<b>Default Proposed</b>	Select this check box if you want the system to default the plan to the proposed amount to the calculated variable compensation amount or the manually funded amount for each employee. If you do not select this check box, the system displays 0.00 as the proposed amount.
<b>Rounding Rule</b>	Select the rounding rule that you want the system to use to calculate award amounts. If you do not specify a rounding rule, the system sets all rounding of the funded and proposed amounts to 2 decimals.

## Define Compensation Cycles - Self-Service Page

Use the Define Compensation Cycles - Self-service page (WCS\_ECM\_CYC\_MSS) to configure behaviors for the self-service components.

Navigation:

**Set Up HCM > Product Related > Compensation > Compensation Processes > Define Compensation Cycles > Self-service**

This example illustrates the fields and controls on the Define Compensation Cycles - Self-service page (1 of 2).

The screenshot shows the 'Self-service' configuration page for a compensation cycle. At the top, there are tabs for 'General', 'Salary', 'Awards', and 'Self-service'. The 'Self-service' tab is selected. Below the tabs, the 'Cycle ID' is 'FOCAL\_2018' and the 'Cycle Description' is 'Focal 2018 Salary & Bonus'. A 'Funding Period' section shows 'Begin' as 01/01/2018, 'End' as 12/31/2018, and 'Description' as 'Focal 2018'. A 'Configuration' section contains several checkboxes: 'Enable Currency Conversion' (unchecked), 'Enable Indirect Report Updates' (checked), 'Display Award History' (unchecked), 'Enable Notepad' (unchecked), and 'Enable Role Delegation' (unchecked). An 'Approvals' section includes 'Enable Approvals Workflow' (checked), a 'Process ID' dropdown set to 'ApproveCompensationProposals' (with a search icon), and a 'Definition ID' dropdown set to 'ByTreeNode1Lvl' (with a search icon). The corresponding labels for the dropdowns are 'Approve Compensation Proposals' and 'Compensation One Step Approval'.

This example illustrates the fields and controls on the Define Compensation Cycles - Self-service page (2 of 2).

**Grid Display Settings** ?

\*Display Type Salary Grid ▼

**Field Layout**

Field	Select	Discretionary	Description
Name	<input checked="" type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
View Alert	<input checked="" type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Exclude	<input checked="" type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Notes	<input type="checkbox"/>		
Employee ID	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Employment Record	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Business Unit	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Job Code	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Position Title	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Salary Admin Plan	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Salary Grade	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Salary Step	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Full/Part	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Performance Rating	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	
Currency	<input type="checkbox"/>	<input type="text"/> <span style="float: right;">Q</span>	

Options on this page include the ability to view or hide some of the columns that will be displayed on the Allocate Compensation (or Manage Cycle Transactions) page.

### Configuration

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Enable Currency Conversion</b>	Select to enable currency conversion on the Allocate Compensation (or Manage Cycle Transactions) page.

<b>Field or Control</b>	<b>Description</b>
<b>Enable Indirect Report Updates</b>	Select to enable updates to information for indirect reports on the Allocate Compensation (or Manage Cycle Transactions) page.  When this check box is selected, the system provides updates to employee information that is one level down from the node to which the manager has Submitter role access.
<b>Display Award History</b>	Select to display award history on the Allocate Compensation (or Manage Cycle Transactions) page.
<b>Enable Notepad</b>	Select to enable the notepad on the Allocate Compensation (or Manage Cycle Transactions) page. The notepad is used primarily for manager comments.
<b>Enable Role Delegation</b>	Select to enable a manager to delegate their compensation role responsibilities to another manager or employee.

## Approvals

**Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

<b>Field or Control</b>	<b>Description</b>
<b>Enable Approvals Workflow</b>	<p>Select to process compensation proposal approvals using the Approval Framework.</p> <p>If this option is enabled, approvers approve, deny, or push back compensation proposals on the <a href="#">Pending Approvals - Allocate Compensation Page</a> or Approve Compensation Proposals page (WCS_ECM_AWE_HOME). Approval transactions are created and handled by the Approval Framework. When a proposal is approved or denied, only the group node status is updated to CNF for Confirmed or PSB for Pushed Back, and notifications will be sent out by the approvals workflow engine for the proposal. When this form of approval is used, an approver's approval action is independent of all other transactions. The action does not cascade down to other lower-level proposals.</p> <p>With this option, the Confirmer role is not available in the Access Type drop down list box on the Administer Cycle Roles page.</p> <p>If this option is not enabled, confirmers approve, deny or push back proposals by clicking the Confirm or Push Back buttons on the Allocate Compensation page. PeopleCode is triggered to update the group node status and generate a compensation alert that can be viewed on Manager Dashboard (if configured). When this form of approval is used, a Confirmer role is typically assigned to a high-level user (for example, a department head) because the system cascades the confirmer's approval action of a transaction down to all its lower-level compensation proposals.</p>
<b>Process ID and Definition ID</b>	<p>Select the process ID and definition ID that you want to use to generate approval workflow. These IDs are entered on the Setup Process Definitions page (select Set Up HCM, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions).</p> <p>See "Setting Up Approval Process Definitions" (Application Fundamentals).</p>



## Grid Display Settings

<b>Field or Control</b>	<b>Description</b>
<b>Display Type</b>	<p>Select the type of grid that you want to enable columns or fields for the system to display on the Allocate Compensation (or Manage Cycle Transactions) page. The system displays the fields associated with the grid you selected. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Awards Grid</i> - refers to the Direct Reports section of the bonus-specific tab (if available).</li> <li>• <i>Salary Grid</i> - refers to the Direct Reports section of the salary-specific tab (if available).</li> </ul> <hr/> <p><b>Note:</b> This value is not available if the selected plan type of the cycle is <i>Variable Comp Only</i>.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>Worker Detail</i> - refers to the Employee Information section on the Allocate Compensation (or Manage Cycle Transactions) - Direct Reports page.</li> </ul>

## Field Layout

This grid is pre-populated with a fixed set of fields. Select the check boxes to indicate that fields you want to appear within several sections on the Allocate Compensation (or Manage Cycle Transactions) page. Some of the check boxes within the grid may be read-only indicating that there are no field values for the particular field or they may be disabled based on another setting for the compensation cycle. The system also does not allow users to add or delete rows.

<b>Field or Control</b>	<b>Description</b>
<b>Field</b>	Displays the name of the field associated with the grid you selected.
<b>Select</b>	Select the check boxes associated with the fields that you want to appear within the corresponding grid on the Allocate Compensation (or Manage Cycle Transactions) page.

<b>Field or Control</b>	<b>Description</b>
<b>Discretionary and Description</b>	<p>Select the text that you want to appear for the field on the Allocate Compensation (or Manage Cycle Transactions) page. The system displays the description to the right of the <b>Discretionary</b> field. If you populate the <b>Discretionary</b> field, the system overrides the Manager Self-Service component with the field label from the corresponding value found in the text catalog.</p> <hr/> <p><b>Note:</b> You will need to provide the discretionary label values by setting them up in the HR Text Catalog in order to see them listed as part of the prompt. We provide a structure within the HR Text Catalog where you can create these values.</p> <hr/> <p>See “Configuring the Text Catalog” (Application Fundamentals).</p>

## Chapter 4

# Configuring Chart Alerts

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## Defining, Configuring, and Maintaining Compensation Alerts

This topic discusses how to define, configure, and maintain compensation alerts.

### Pages Used to Define, Configure, and Maintain Compensation Alerts

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Compensation Alert Definition Page</u>	WCS_ALERT_SETUP	Define and configure compensation alerts for use within the eCompensation Manager Self Service functionality.
<u>Maintain Text Catalog Page</u>	HR_SSTEXT_TEXT	Create or update the message text used for compensation alerts within the eCompensation Manager Self Service functionality.
<u>Compensation Alert Maintenance Page</u>	WCS_ALERTS_MAINT	Report on or purge existing employee compensation alerts.

### Compensation Alert Definition Page

Use the Compensation Alert Definition page (WCS\_ALERT\_SETUP) to define and configure compensation alerts for use within the eCompensation Manager Self Service functionality.

Navigation:

**Set Up HCM > Product Related > Compensation > Utilities > Compensation Alert Definition > Compensation Alert Definition**

This example illustrates the fields and controls on the Compensation Alert Definition page.

*Event Code	*Status	Allow Delete	Allow Duplicates	Preferred Display		
BLT	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+	-
CAN	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+	-
CMP	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notification Period	+	-
CNF	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Review Period	+	-
FIN	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+	-
JCO	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notification Period	+	-
MGA	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Update Period	+	-
OPN	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notification Period	+	-
PSB	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		+	-
SUB	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Update Period	+	-

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

### Parameters Tab

<b>Field or Control</b>	<b>Description</b>
<b>Event Code</b>	Displays the code that determines which event needs to be raised.
<b>Status</b>	Select <i>Active</i> to activate a specific event for processing.
<b>Allow Delete and Allow Duplicates</b>	Select the <b>Allow Delete</b> check box to allow users to delete rows. If the <b>Allow Duplicate</b> check box has also been selected, then duplicate alert messages are supported. If the <b>Allow Duplicates</b> check box is deselected, the system replaces any existing message.
<b>Preferred Display</b>	Select either <i>Default</i> , <i>Notify</i> , <i>Review</i> , or <i>Update</i> to indicate the preferred time period the alert should be available for display. Please note that this <i>preferred</i> period may not be defined depending on how the cycle definition has been set up.  These display periods relate directly back to the same periods that have been set within the Administer Compensation Cycle component, which was created by the administrator. The actual range of date are specific to each cycle.

## Text Catalog Keys Tab

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

## Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR\_SSTEXT\_TEXT) to create or update the message text used for compensation alerts within the eCompensation Manager Self Service functionality.

Navigation:

**Set Up HCM > Product Related > Compensation > Utilities > Compensation Alert Text > Maintain Text Catalog**

This example illustrates the fields and controls on the Maintain Text Catalog page.

**Maintain Text Catalog**  
Workforce Comp Solutions

Sub ID: ALRT  
Usage: Page Instructions

Text ID: MESSAGE  
Description: Alert Message Text for eCompensation Manager Self Service

**Text Entries** Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

**Context Keys and Text** Find | View All First 1 of 10 Last

Event Code: BLT  
Budget ID:  
Access Type:

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

[View/Edit as HTML](#)

[View all effective dates and context keys for this Text ID](#)

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

<b>Field or Control</b>	<b>Description</b>
<b>Usage</b>	<p>Select one of these values based on how the text will be used:</p> <ul style="list-style-type: none"> <li>• <i>Email Body</i></li> <li>• <i>Email Subject</i></li> <li>• <i>Error/Warning</i></li> <li>• <i>Field Label</i></li> <li>• <i>Grid/Scroll Heading</i></li> <li>• <i>Groupbox Title</i></li> <li>• <i>Hyperlink/Button</i></li> <li>• <i>Page Instructions</i></li> <li>• <i>Page Title</i></li> </ul>
<b>Event Code</b>	<p>Select one of these event codes:</p> <ul style="list-style-type: none"> <li>• <i>APR</i> - Group Status set to Approved.</li> <li>• <i>BIP</i> - Cycle Status set Building.</li> <li>• <i>BLT</i> - Cycle status set to Built.</li> <li>• <i>CAN</i> - Cycle status set to Canceled.</li> <li>• <i>CLC</i> - Group status set to Calculated.</li> <li>• <i>CMP</i> - Group status set to Completed.</li> <li>• <i>CNA</i> - Confirmer is added to a group.</li> <li>• <i>CNF</i> - Group status set to Confirmed.</li> <li>• <i>DEF</i> - Cycle Status set to Defined.</li> <li>• <i>FIN</i> - Cycle Status set to Finalized.</li> <li>• <i>INP</i> - Group Status to In Progress.</li> <li>• <i>MGA</i> - Manager added to a group.</li> <li>• <i>OPN</i> - Cycle status set to Open.</li> <li>• <i>PSB</i> - Group status Pushed Back.</li> <li>• <i>RMV</i> - Individual is removed a group.</li> <li>• <i>RTL</i> - Group status set to Ready.</li> <li>• <i>RVA</i> - Reviewer added to a group.</li> <li>• <i>SUB</i> - Group status set to Submitted.</li> </ul>

<b>Field or Control</b>	<b>Description</b>
<b>Budget ID</b>	Select a cycle ID with which you want to associate the text.
<b>Access Type</b>	Select one of these values to indicate the role that should have access to the text message: <ul style="list-style-type: none"> <li>• <i>Confirmer</i></li> <li>• <i>Reviewer</i></li> <li>• <i>Submitter</i></li> </ul>

## Compensation Alert Maintenance Page

Use the Compensation Alerts Maintenance page (WCS\_ALERTS\_MAINT) to report on or purge existing employee compensation alerts.

Navigation:

**Set Up HCM > Product Related > Compensation > Utilities > Compensation Alert Maintenance > Compensation Alerts Maintenance**

This example illustrates the fields and controls on the Compensation Alerts Maintenance page.

The screenshot shows the 'Compensation Alert Maintenance' page. At the top, there is a 'Run Control ID 1' label, 'Report Manager' and 'Process Monitor' links, and a 'Run' button. Below this is a 'Parameters' section with the following fields:

- \*Action: A dropdown menu currently showing 'Log Alerts'.
- \*Cycle ID: A text input field with a magnifying glass icon.
- \*Start Date: A text input field with a magnifying glass icon.
- Tree Node Number: A text input field.
- Access Type: A dropdown menu.
- Employee ID: A text input field.

<b>Field or Control</b>	<b>Description</b>
<b>Action</b>	<p>Select one of these values to indicate the action you want the system to take regarding the disposition of the alerts:</p> <ul style="list-style-type: none"> <li>• <i>Log Alerts</i></li> <li>• <i>Log Expired Alerts</i></li> <li>• <i>Purge Alerts</i></li> <li>• <i>Purge Expired Alerts</i></li> </ul>
<b>Cycle ID</b>	Select a cycle for which you want the system to take action.
<b>Start Date</b>	Select the date upon which you want the system to start an action.
<b>Tree Node Number</b>	Enter the tree node number upon which you want the system to take action.
<b>Access Type</b>	<p>Select one of these values to indicate which access type upon which you want the system to take action:</p> <ul style="list-style-type: none"> <li>• <i>Comp Admin</i></li> <li>• <i>Confirmer</i></li> <li>• <i>Reviewer</i></li> <li>• <i>Submitter</i></li> </ul>
<b>Employee ID</b>	Enter the employee ID upon which you want the system to take action.



# Administering Compensation Cycles

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## Understanding Cycle Administration

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

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

See [Delivered Compensation Pivot Grids \(Available on the Administer Compensation Page\)](#)

At a high level, the administration of a compensation cycle involves these tasks:

1. Building of the cycle by populating processing tables with employees' demographical data, compensation proposals and funding information.

This is done by running the Cycle Build AE process.

See [Understanding the Cycle Build Process](#)

2. Opening the cycle (after making sure that data is correct) to managers to review and make necessary adjustments to compensation proposals for their reports on the [Allocate Compensation Page](#).

While a cycle is opened, the administrator can run the Process Job Change AE process to capture several types of job changes taken place during the open cycle, and notify managers of these changes as they begin to allocate compensation amounts to their employees.

See [Understanding Job Change Processing During Open Cycles](#)

3. Loading awards and salary updates to employees' job data, after managers have submitted their proposals, which are approved by the administrator.

This is done by running the Cycle Load AE process.

See [Understanding the Cycle Load Process](#)

4. Closing the cycle.

As an administrator, you track the phases of a compensation cycle using the cycle status code. As the compensation cycle proceeds, you perform the tasks that are represented as action buttons in a process flow. In many cases these tasks are, in turn, dependent upon each other and may modify the cycle status code.

See [Administer Cycle Page](#)

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## Understanding the Cycle Build Process

The Compensation Cycle Build (WCS\_ECMBUILD) application engine (AE) process populates a series of processing tables that are used to store a snapshot of the employee demographic data, salary proposals, variable compensation proposals, funding information for each of the group nodes defined in the tree hierarchy, and the default role access. It also performs a series of validations and edits to identify any errors in building your compensation cycle.

Prior to building a compensation cycle, make sure that:

- The funding information and options are entered in the compensation cycle definition. Specifically, enter the total funding, minimum and maximum percentages allowed when a manager adjusts salaries in his or her department if Configurable Matrix is not used. Select the **Discretionary** check box to if you want to allow managers to override the calculated funding amount; select the **Default Proposal to Funded** check box to set the default proposal to the calculated funded amount.
- ePerformance reviews are in a *Complete* status.
- Variable compensation has been calculated and is in an *Initial* status.
- The Proration Exception table is populated.
- Employee changes to job history are accurate for any type of proration calculation.

When the Compensation Cycle Build process successfully builds your compensation cycle, the system sets the status of the compensation cycle to *Built*. As you review the results of the built compensation cycle, you may find that you need to make adjustments to its definition. When that happens, simply cancel the built compensation cycle, adjust the compensation cycle definition, and run the Compensation Cycle Build process again.

Once the calculated funding has been reviewed and finalized, the built compensation cycle is ready to be opened to managers.

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

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See “Calculation Processes” (PeopleSoft Human Resources Manage Variable Compensation).

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## Understanding Job Change Processing During Open Cycles

After the administrator has built and subsequently opened a compensation cycle, managers can begin allocating salary and variable compensation amounts to employees and submitting proposals for approval. During this time, changes can happen to employees' HR data, and these changes (for example, employee termination) may have an impact on the adjustments that an individual and as well as other employees should receive. To provide managers more information and hence better insight on how to handle employee job changes during the open cycle, the system delivers the ability to:

- Capture job changes that occurred to employees during the open cycle and optionally zero out proposed amounts that are assigned to employees as configured in the compensation cycle definition.
- Display alert messages for employees who had job changes.

To set up this functionality, you specify the type of job changes that the system needs to track on the Define Compensation Cycles - Salary page. Supported job change types include:

- Change of employee’s HR status from active to inactive (for example, termination)
- Salary change
- Salary currency change

For each type that is selected, indicate if the system should zero out the budget and proposed amounts for individuals that are found with that type of job change, or leave the amounts unchanged and let the managers take care of them manually.

The system generates alert messages when employees with one or more of the preselected job changes were identified during the open cycle. These alerts are available when managers and administrators access the Allocate Compensation component, and they are displayed next to the associated employees in the View Alert column:

This example illustrates the fields and controls on the Display of job change alert on the Allocate Compensation page.

Merit Pay		Bonus Plan											
Direct Reports													
Name	View Alert	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Compa-Ratio	Salary Grade	Performance Rating		
Donahue,Edmund		<input type="checkbox"/>	62,400.00	1,872.00	3.00	624.00	1.00	63,024.00	0.85006	006	N		
Lee,Mei		<input type="checkbox"/>	40,040.00	2,002.00	5.00	2,002.00	5.00	42,042.00	0.76005	005	M		
Quilligan,Shawn		<input type="checkbox"/>	48,006.40	1,440.00	3.00	480.00	1.00	48,486.40	0.92005	005	N		
Reese,Daryl		<input type="checkbox"/>	40,560.00	4,056.00	10.00	4,056.00	10.00	44,616.00	0.97004	004	C		
Stevenson,Christelle		<input type="checkbox"/>	26,000.00	1,300.00	5.00	1,300.00	5.00	27,300.00	0.85003	003	M		

Indirect Reports											
Empl ID and Record	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status Date		
KU0102_000	Edmund Donahue	Pushed Back	-1,500.00	87,048.00	3,152.00	3.62	4,652.00	5.34	06/05/12 5:03PM		
KU0020_000	Christelle Stevenson	Confirmed	0.00	53,040.00	3,192.00	6.02	3,192.00	6.02	06/05/12 5:02PM		

Return to Message & Alerts

To ensure that these alerts are always visible as they become available, the View Alert field (under the Grid Display Settings section of the Define Compensation Cycles - Self-service page), where the alert icons are shown, is selected by default. When a manager clicks an alert icon, a modal window appears, and it lists details pertaining to the corresponding job change:

This example illustrates the fields and controls on the Display of job change alert message after clicking an alert icon.

Salary Change	
Employee Name	Stevenson,Christelle
Effective Date	02/04/2012
Currency Code	USD
HR Action	Pay Rate Change
Reason	MER
Old Salary	26,000.000000
New Salary	15,500,000
Change Percent	24.000
Explanation	This employee had a salary change during the open cycle.

Return

With this information in hand, the manager can allocate compensation amounts to his or her reports appropriately.

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**Note:** The View Alert field is only available when the selected display type is *Salary Grid*.

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## Processing Job Changes

Compensation delivers the Process Job Change (WCS\_CYC\_RULE) AE process to capture employee job changes when a cycle is opened.

As an administrator, you run this AE process from a standard run control component when a cycle is opened for compensation allocation. When the process is launched, it compares, for each employee included in the cycle, the snapshot of his or her job record that was taken right when the cycle was built against his or her job record as of the salary increase effective date specified for the compensation cycle, whichever is earlier. If it finds any of the following job changes that become effective during this timeframe:

- (*Active to Inactive Status* change) Payroll status is not equal to A, L, P, or S
- (*Currency Code* change) Change in compensation currency code
- (*Salary* change) Change in compensation rate

And the corresponding job change type is selected in the associated compensation cycle definition to be tracked, the update is recorded in the log file that is available in the process detail of the Process Job Change AE process that was ran.

Next, the process checks if the Excluded option is selected for the job change type. If a change is identified for a selected job change type with the Excluded option enabled, the system zeros out the proposed amount for the employee and marks that employee as excluded from the cycle, if the employee belongs to a group node that is in the *Calculated*, *In Progress*, or *Pushed Back* status. After that, the funded and proposed amounts are recalculated at the node level. If the Exclude option is not selected, the funds for employees with the job change remain intact.

**Note:** If the salary increase effective date is prior to the date when the cycle was built, no alerts will be generated for any job changes that occur during this time.

This table lists the possible actions that the Process Job Change AE process performs when a qualifying job change occurs, based on the employee's group node status and whether or not the Excluded option of the job change is selected:

<b>Group Node Status</b>	<b>Action (Excluded option Selected)</b>	<b>Action (Excluded option Not Selected)</b>
Calculated	Zeros out employee's proposed amount, excludes employee from cycle, and logs job change	No change to fund and logs job change
In Progress	Zeros out employee's proposed amount, excludes employee from cycle, and logs job change	No change to fund and logs job change
Pushed Back	Zeros out employee's proposed amount, excludes employee from cycle, and logs job change	No change to fund and logs job change
Submitted	No change to fund and logs job change	No change to fund and logs job change
Approved	No change to fund and logs job change	No change to fund and logs job change
Ready to Load	No change to fund and logs job change	No change to fund and logs job change

Recorded job changes are available for review as alerts (if enabled in the compensation cycle definition) in the Allocate Compensation component, which is accessible from the Manager Self Service for managers, as well as the Manage Cycle Transactions component for administrators.

## Job Change Processing - Example

This example describes how the job change process works in an event of a salary update that occurred during an opened compensation cycle.

Suppose that a compensation cycle has been defined in the system for the previous year. In this cycle definition:

- The increase effective date is set to February 15 of this year.
- Job change rule for salary change is enabled, and the Exclude option for it is not selected.
- The View Alert option is enabled for the salary grid to display job change alerts.

After building the cycle, the administrator opens it up so that the manager of the cycle can begin allocating compensation for employees included in the cycle. During the open period, employee Christelle Stevenson has been given a salary increase with an effective date of February 04 of this year. The increase is recorded in her job data as a new row and it is unrelated to this open compensation cycle.

To make sure that the manager is aware of all the salary changes that may have taken place during the open cycle, the administrator kicks off the job change process. After the process has run successfully, the process logs Christelle's salary job change in the WCS\_CYC\_RULE\_INFO log file.

As a result, when the manager accesses the Allocate Compensation page to view and edit the team's compensation proposals at runtime, the View Alert icon appears on Christelle's row. The manager can click the icon to see the detail of the alert (in this case about the February 04 salary update). The proposed amount and percent are still displayed for Christelle because the Exclude option is not selected for the salary job change in the setup; and the manager can adjust the values manually based on company guidelines.

Note that the proposed salary update for Christelle will not be processed by the Compensation Cycle Load process (WCS\_CYCLOAD) and therefore not inserted to her job data. The same is true for HR status changes and currency code changes that occur during the open cycle. When these types of updates are found in the system, it is the administrator's responsibility to review and process them individually after the compensation cycle is closed.

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**Note:** The Compensation Cycle Load process (WCS\_CYCLOAD) supports Real Time Indexing (RTI) batch switch. This enables RTI to be switched off when heavy duty batch processes run. This feature uses PeopleTools search technology and is recommended for PeopleTools release 8.59.09 or higher. For more information about Real Time Indexing, refer to PeopleTools Search Technology, "Administering Real Time Indexing."

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## Considerations for Job Change Processing

### General

When an employee has been excluded from a cycle by the Job Change process, he or she remains excluded throughout the cycle. For example, if the employee has a salary change during an open cycle and salary change is a job change that has the Excluded option enabled, the process zeros out his or her compensation amounts and marks him or her as excluded. If the employee has a currency code change later on in the open cycle and this job change *does not* have the Excluded option enabled, the process captures the currency code change but it does not update the excluded status of the employee based on the setup of the corresponding job change.

Another note for the Excluded option is that the process only zeros out compensation amounts of employees only when they belong to a group node that is in *Calculated*, *In Progress*, or *Pushed Back* status, in which the manager can edit the amounts as needed. Once the proposals are in the *Submitted*, *Approved*, or *Ready to Load* status and are no longer available for edits, the process still captures the job changes, but will not zero out employees' budget and proposed amounts regardless of setup. Approvers of these proposals can see the Exclude flag when viewing proposal details, and push the transactions back to managers for them to manually zero out the funds and reallocate them to employees based upon company policy.

Also, the Job Change process does not process corrections. For example, an employee is terminated during an open cycle and the HR status is changed to *Inactive*. When the Job Change process runs, it picks up this job change and displays an alert on the Allocate Compensation page. If the same employee is rehired later and the HR status reactivated, this change will not be captured by the Job Change process.

### Salary Change Specific

The Job Change process is responsible for processing job changes that occur only for the rate codes that are specified in the cycle definition. It does not process any job change that happens to an employee during an open cycle but is not for any rate code listed in the cycle definition.

## Understanding the Cycle Load Process

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

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

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

<b>Step</b>	<b>Description</b>
Validate Run Control Parameters	The system obtains run control parameters as well as the cycle status for the designated cycle. If the cycle status is not <i>Open</i> , the system perform exits to abort the process.
Populate Configuration Row Sets	The system creates stand alone component level row sets to hold the variable compensation, salary, and salary action cycle configurations. For non-cash variable compensation plans, the system obtains the current valuation per unit value.
Create Direct Report Group Row Set	The system selects all direct report group rollup nodes where the group status is equal to <i>Ready To Load</i> . For each row, the system retrieves information from the Process Salary Increases, Process Awards and Update Group Status sections.

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



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

## Updating Future Dated Job Row(s) with a Salary Update

The Compensation Cycle Load process performs specific validations prior to inserting a new job data row with the approved salary update. If a future dated job row exists to that salary update being applied, then the process performs the same validations on the future dated row to determine if the salary update can be inserted into job.

If it finds that *any* of these conditions is not true:

- The employee status is equal to A, L, P, or S.
- The employee still has the compensation rate code being adjusted by the cycle.

- The employee has the same currency code that was used during the cycle.
- The employee has the same annual salary that was adjusted during the cycle.

It sets the proposal status to *Load Error* and writes the error in the log for the salary update. The compensation administrator, after reviewing the error information, can take the appropriate action based on company policy to manually apply the salary update to the employee's job data.

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## Administering Compensation Cycles

This topic discusses how to administer compensation cycles.

### Pages Used to Administer Compensation Cycles

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Administer Cycle Page</a>	WCS_ECM_CYC_ADM	Build, open, load, close, and cancel compensation cycles.
<a href="#">Access Rules Page</a>	WCS_ECM_CYC_PDS	Set the time periods in which managers can review, update, and be notified of changes in the compensation cycle.
<a href="#">Summary Page</a>	WCS_ECM_CYC_SUM	View a summary of the cycle, including funding period, status, currency, funding amounts, funding percentages, headcounts, and calculated total salaries.
<a href="#">Build Cycle Page</a>	WCS_ECMBUILD_RCTL	Run the Cycle Build Application Engine program.
<a href="#">Load Salary Updates and Awards Page</a>	WCS_ECMLOAD_RCTL	Run the Load Salary Updates and Awards Application Engine program.
<a href="#">Process Job Changes Page</a>	WCS_RULE_RNCTL	Run the Job Change Application Engine program to capture employee job changes when a cycle is opened.
<a href="#">Manage Cycle Transactions Page</a>	WCS_ECM_MSS_SUM	Enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.
<a href="#">Manage Cycle Transactions - Direct Reports Page</a>	WCS_ECM_MSS_DET	Enter compensation proposal changes for individuals.




## Administer Cycle Page

Use the Administer Cycle page (WCS\_ECM\_CYC\_ADM) to build, open, load, close, and cancel compensation cycles.


Navigation:




**Compensation > Compensation Cycles > Administer Cycle > Administer Cycle**

This example illustrates the fields and controls on the Administer Cycle page.


<b>Administer Cycle</b>   Access Rules   Summary			
Cycle ID FOCAL_2011		Cycle Description Focal 2011 Salary and Bonus	
<b>Funding Period</b>			
Begin	01/01/2011	Description	Focal 2011 Cycle
End	12/31/2011		
<b>Process Flow</b> ?		<b>Cancel Cycle</b> ?	<b>Analytics</b>
			Compensation Analytics ▼ Compensation Analytics
<b>Status History</b>   Personalize   Find   View All      First 1-10 of 16 Last			
Cycle Status	Last Updated	User ID	Name
Opened	06/05/12 5:01PM	SAMPLE	Betty Locherty
Built	06/05/12 5:01PM	SAMPLE	Betty Locherty
Build In Progress	06/05/12 5:01PM	SAMPLE	Betty Locherty
Canceled	06/05/12 4:57PM	SAMPLE	Betty Locherty
Opened	06/05/12 4:56PM	SAMPLE	Betty Locherty
Built	06/05/12 4:55PM	SAMPLE	Betty Locherty
Build In Progress	06/05/12 4:55PM	SAMPLE	Betty Locherty
Canceled	06/05/12 4:54PM	SAMPLE	Betty Locherty
Opened	06/05/12 4:19PM	SAMPLE	Betty Locherty
Built	06/05/12 4:15PM	SAMPLE	Betty Locherty

## Process Flow

<i>Field or Control</i>	<i>Description</i>
 <b>Build</b>	Click the <b>Build</b> button to access the Build Cycle page.  The system enables this button only if the cycle status is <i>Defined</i> or <i>Canceled</i> .

<b>Field or Control</b>	<b>Description</b>
 <b>Open</b>	<p>Click the <b>Open</b> button to access the Administer Cycles Confirmation page and open funding for the cycle. The system enables this button only if the cycle status is <i>Built</i>.</p> <p>The system displays a confirmation page with an appropriate message. If the user clicks <b>OK</b>, the system sets the current cycle status to <i>Open</i>.</p>
 <b>Load</b>	<p>Click the <b>Load</b> button to access the Load Salary Updates and Awards page.</p> <p>The system enables this button only if the cycle status is <i>Open</i> and one or more group statuses are set to <i>Ready to Load</i>.</p>
 <b>Close</b>	<p>Click the <b>Close</b> button to access a confirmation page with an appropriate message. If the user clicks <b>OK</b>, the system sets the current cycle status to <i>Closed</i>.</p> <p>The system enables the <b>Close</b> button if the cycle status is <i>Open</i> and all groups in the cycle have a status of <i>Complete</i> or <i>Complete with Errors</i>.</p>

## Cancel Cycle

<b>Field or Control</b>	<b>Description</b>
 <b>Cancel</b>	<p>Click the <b>Cancel</b> button to set the cycle status to <i>Canceled</i>, the date the cycle was canceled to the current date, as well as the <b>By</b> field to the ID of the person signed on to the system.</p> <p>Additionally, the system checks that no groups within the cycle have a group status code of <i>Complete</i>. If there are one or more groups that have a group status code of <i>Complete</i>, the system displays an error message. You may also see a warning message if the cycle needs to be recalculated. In this case click <b>OK</b> to continue or <b>Cancel</b> to stop processing.</p> <p>The system enables this button only if the cycle status is <i>Open</i> or <i>Calculated</i>.</p>

## Analytics

<i>Field or Control</i>	<i>Description</i>
<b>Compensation Analytics</b>	Click to select to view one of these pivot grids: <ul style="list-style-type: none"> <li>• Cycle Tracking</li> <li>• Cycle Guideline Alert</li> </ul> See <a href="#">Understanding Compensation Pivot Grids</a> .

## Status History

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

See Also [Cycle Statuses](#)

## Access Rules Page

Use the Access Rules page (WCS\_ECM\_CYC\_PDS) to set the time periods in which managers can review, update, and be notified of changes in the compensation cycle.

Navigation:

**Compensation > Compensation Cycles > Administer Cycle > Access Rules**

This example illustrates the fields and controls on the Access Rules page.

The screenshot shows the 'Access Rules' tab selected. At the top, it displays 'Cycle ID FOCAL\_2011' and 'Cycle Description Focal 2011 Salary and Bonus'. Below this, a 'Funding Period' section shows 'Begin 01/01/2011' and 'End 12/31/2011', with a 'Description Focal 2011 Cycle'. The 'Cycle Status' is 'Opened'. The main section is 'Manager Access Periods', which includes a search bar and a table with columns for 'Event Display Code', 'Start Date', and 'End Date'. The table lists four periods: Notification Period, Default, Review Period, and Update Period, all with start dates of 01/01/2011 and end dates of 12/31/2012. Each row has plus and minus buttons for expansion.

**Note:** Manager Access Periods control the display of the compensation alerts that are generated, not the period to which the manager has access to enter their proposals. If the cycle is *Open*, the managers will have access to their group(s) based on the access defined on the Administer Cycle Roles page.

## Manager Access Periods

<b>Field or Control</b>	<b>Description</b>
<b>Event Display Code</b>	Select the event for which you want to set a start and end date. Values include: <ul style="list-style-type: none"> <li>• <i>Default</i></li> <li>• <i>Notification Period</i></li> <li>• <i>Review Period</i></li> <li>• <i>Update Period</i></li> </ul>
<b>Start Date and End Date</b>	Enter the start and end dates for each event that you add to this page.

## Summary Page

Use the Summary page (WCS\_ECM\_CYC\_SUM) to view a summary of the cycle, including funding period, status, currency, funding amounts, funding percentages, headcounts, and calculated total salaries.

Navigation:

**Compensation > Compensation Cycles > Administer Cycle > Summary**

This example illustrates the fields and controls on the Summary page.

<a href="#">Administer Cycle</a>		<a href="#">Access Rules</a>		<a href="#">Summary</a>						
Cycle ID FOCAL_2011			Cycle Description Focal 2011 Salary and Bonus							
<b>Funding Period</b>										
Begin 01/01/2011		Description Focal 2011 Cycle								
End 12/31/2011										
Cycle Status Opened			Currency Code USD							
<b>Funding Overview for Salary Plans</b>										
Description	Calculated Headcount	Calculated Total Salaries	Calculated Amount	Calculated Percent	Qualified Headcount	Qualified Salaries	Funded Amount	Funded Percent	Proposed Amount	Proposed Percent
Merit Increase	11	486,054.40	26,041.00	5.36	11	486,054.40	26,041.00	5.36	25,333.00	5.21
<b>Funding Overview for Award Plans</b>										
Description	Calculated Headcount	Calculated Total Salaries	Calculated Award	Calculated Percent	Qualified Headcount	Qualified Salaries	Funded Award	Funded Percent	Proposed Award	Proposed Percent
Bonus Plan	11	486,054.40	23,730.00	4.88	11	486,054.40	23,730.00	4.88	18,758.00	3.86

## Funding Overview for Salary Plans

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

<b>Field or Control</b>	<b>Description</b>
<b>Calculated Percent</b>	This field is equal to the calculated amount divided by the calculated total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.
<b>Funded Percent</b>	This field is equal to the funded amount divided by the adjusted total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.
<b>Proposed Percent</b>	This field is equal to the proposed amount divided by the adjusted total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.

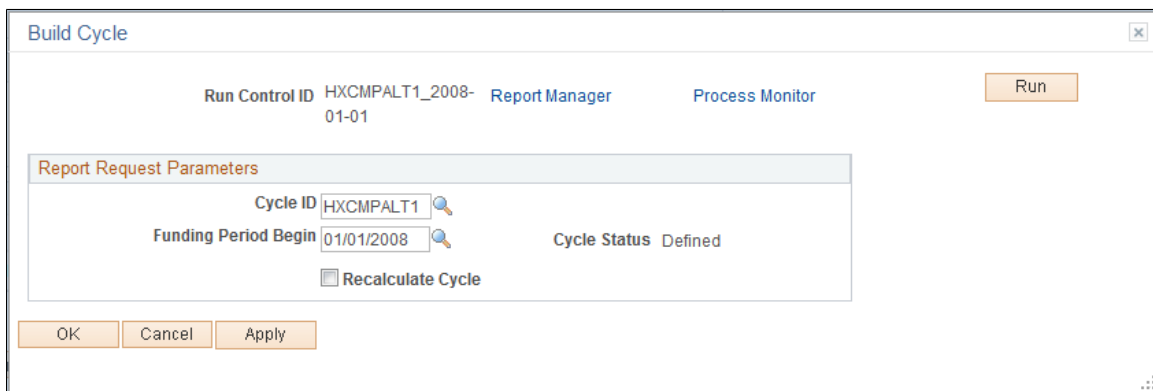
## Build Cycle Page

Use the Build Cycle page (WCS\_ECMBUILD\_RCTL) to run the Cycle Build Application Engine program.

Navigation:

Click the **Build** button on the Administer Cycle page.

This example illustrates the fields and controls on the Build Cycle page.



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

This process updates the cycle status, deletes old data, reads general parameters, resolves group definitions, creates employee demographic data, creates direct report nodes, create rollup nodes, processes

salary plans, processes variable compensation plan information, creates an access table, and updates the cycle status log file.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle ID</b>	Select the cycle for which you want to run the cycle build and calculation process.
<b>Funding Period Begin</b>	Select the begin date of the funding period for which you want to run the cycle build and calculation process.
<b>Recalculate Cycle</b>	Select this check box if you want the system to recalculate a cycle that has already been built and calculated.

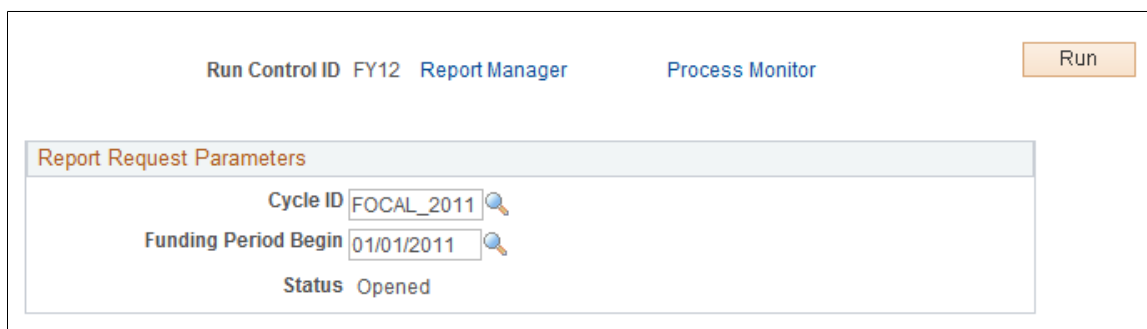
## Load Salary Updates and Awards Page

Use the Load Salary Updates and Awards page (WCS\_ECMLOAD\_RCTL) to run the Load Salary Updates and Awards Application Engine program.

Navigation:

- **Compensation > Compensation Cycles > Load Salary Updates and Awards > Load Salary Updates and Awards**
- Click the **Load** button on the Administer Cycle page.

This example illustrates the fields and controls on the Load Salary Updates and Awards page.



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

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

<b>Field or Control</b>	<b>Description</b>
<b>Cycle ID</b>	Select the cycle for which you want to load salary updates and award information.



<b>Field or Control</b>	<b>Description</b>
<b>Funding Period Begin</b>	Select the begin date of the funding period for which you want to load salary updates and award information.

## Process Job Changes Page

Use the Process Job Changes page (WCS\_RULE\_RNCTL) to run the Job Change Application Engine program to capture employee job changes when a cycle is opened.

Navigation:

**Compensation > Compensation Cycles > Process Job Changes > Process Job Changes**

This example illustrates the fields and controls on the Process Job Changes page.

Click the **Run** button to access the Process Scheduler Request page and launch the Job Change Application Engine (WCS\_CYC\_RULE).

This process identifies job changes (selected in the compensation cycle definition) that occurred between the time this process is triggered and the time the compensation cycle became opened. Based on the setup, either the system zeros out the funded and proposed amounts given to employees with the job changes, or it will be up to the manager or administrator, upon viewing the alert, to decide what the course of action is.

<b>Field or Control</b>	<b>Description</b>
<b>Cycle ID</b>	Select the cycle for which you want to run the process to track job change activities for employees while the cycle is opened.
<b>Funding Period Begin</b>	Select the begin date of the funding period used to run the process.

## Manage Cycle Transactions Page

Use the Manage Cycle Transactions page (WCS\_ECM\_MSS\_SUM) to enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.

Navigation:

- (Classic) **Compensation > Compensation Cycles > Manage Cycle Transactions > Manage Cycle Transactions**
- (From the Compensation Administration tile) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Management > Manage Cycle Transactions**

This example illustrates the fields and controls on the Manage Cycle Transactions page.

**Manage Cycle Transactions**

Betty Locherty  
Current Role Compensation Administrator

**Instructions**  
You are viewing Finance Director organization's plan data for the Focal 2018 Salary with Calculated status. Please review the given information and make recommendations. You may make updates here or drill into each employee's data separately.

Save for Later   Discard Changes   Submit   Mark Ready to Load

Planning Currency USD US Dollar

**Analytics**  
▼ Compensation Analytics

[President & CEO > Chief Finance Officer > Finance Director](#)

**Organization Summary Data** ⓘ

Organizational Summary						
Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
▼ Analytics	Merit Increase	1	70,000.00	2,800.00	0.00	2,800.00

**Indirect Reports** ⓘ

Position Title	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status Date
19360017	Senior Accounting Manager	Calculated	2,800.00	70,000.00	2,800.00	4.00	0.00	0.00	12/07/18 9:53PM

<b>Field or Control</b>	<b>Description</b>
<b>Save for Later</b>	Click this button if you want to save any changes you may have made and review them later. This will update the status of the group proposals to <i>In Progress</i> . The system enables this button based on the role of the user and if the group status of the proposal is <i>Calculated</i> , <i>In Progress</i> , or <i>Pushed Back</i> .
<b>Discard Changes</b>	Click this button if you want to discard any changes you may have made. The system enables this button based on the role of the user and if the group status of the proposal is <i>Calculated</i> , <i>In Progress</i> , or <i>Pushed Back</i> .

<b>Field or Control</b>	<b>Description</b>
<b>Submit</b>	<p>Click this button to submit any changes you may have made to the upper node or one node up for processing. This will update the group status to <i>Submitted</i>. The system enables this button if the user has the Submitter role access and the group status of the proposal is <i>Calculated</i>, <i>In Progress</i>, or <i>Pushed Back</i>.</p> <hr/> <p><b>Note:</b> When you click the <b>Submit</b> button (or when you approve or deny a submitted compensation proposal on the Approve Compensation Proposals page), the system takes you to the Approvals Comments page (WCS_ECM_AWE_CMT) where optional remarks can be entered about the button action you just performed. Click OK to save your comments, or click Cancel to leave the page without entering any. Note that the OK and Cancel buttons pertain to the comments section and not to the proposal itself. In other words, clicking the Cancel button merely skips the comment entering step; it does not affect the state of the proposal that is in progress.</p> <hr/>
<b>Push Back</b>	<p>Click this button to send the proposal back to the last person who had approval authority. The system enables this button based on the role of the user and if the group status is <i>Submitted</i>.</p> <hr/> <p><b>Note:</b> If you define your Compensation Cycle to use the Approval Workflow Engine (AWE), the system does not enable the <b>Push Back</b> button. This is managed within AWE.</p> <hr/>
<b>Confirm</b>	<p>Click this button to confirm group proposals. The system enables this button based on the role of the user and if the group status is <i>Submitted</i>.</p>
<b>Mark Ready to Load</b>	<p>Click this button to change the status of the proposal to <i>Ready to Load</i>. The system enables this button if the user has been assigned the Compensation Administrator role and the group status has reached the <i>Confirmed</i> status.</p>
<b>Compensation Analytics</b>	<p>Click this link to select one of these pivot grids to view:</p> <ul style="list-style-type: none"> <li>• Compensation Distribution</li> <li>• Salary Analysis</li> </ul> <hr/> <p><b>Note:</b> Compensation Analytics links are not available to cycles that support variable compensation only.</p> <hr/> <p>See <a href="#">Understanding Compensation Pivot Grids</a>.</p>
<b>View Approvals Monitor</b>	<p>Click to view the current approval status of the compensation proposal on the Approvals Monitor page (WCS_ECM_AWE_SM) after it has been submitted for approval.</p>

The navigation path, which shows position, supervisor, or department names depending on the tree setup, indicates where you are in the tree structure and the tree node data that you are currently viewing.

Click a link to view the plan data of the corresponding position, supervisor, or department node.

### Organization Summary Data

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

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

If the proposal includes more than one plan (for example, merit increase and bonus plan), a tab for each plan appears below the Organization Summary Data group box to display plan-specific data.

---

**Note:** Salary-related (or merit-related) rows are not available to cycles that support variable compensation only.

---

<b>Field or Control</b>	<b>Description</b>
<b>Analytics</b>	<p>Click to select one of these pivot grids to view:</p> <ul style="list-style-type: none"> <li>• Salary Increase by Performance (for salary plans only).</li> <li>• Variable Compensation by Performance (for cash-type variable compensation plans only).</li> </ul> <hr/> <p><b>Note:</b> Analytics links are not available to cycles that support variable compensation only (plan type is set to <i>Variable Comp Only</i>).</p> <hr/> <p>See <a href="#">Understanding Compensation Pivot Grids</a>.</p>

### Direct Reports

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

<b>Field or Control</b>	<b>Description</b>
<b>Change Amount</b>	<p>Enter the amount by which you want to change the individual's compensation and then click the <b>Save for Later</b> button.</p> <p>The system updates the amount in the <b>Total Proposed Amount</b> field in the Organization Summary Data group box and recalculates the amount in the <b>Balance</b> field.</p>

### Indirect Reports

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

Click a link to view the detailed plan data of the corresponding node on the same page.

## Manage Cycle Transactions - Direct Reports Page

Use the Manage Cycle Transactions - Direct Reports page (WCS\_ECM\_MSS\_DET) to enter compensation proposal changes for individuals.

Navigation:

Click a name link in the **Direct Reports** section of the Manage Cycle Transactions page.

This example illustrates the fields and controls on the Manage Cycle Transactions - Direct Reports page (1 of 2).

**Manage Cycle Transactions**

**Direct Reports**

Betty Locherty

Name: Christelle Stevenson

Job Title: Manager-Accounting

**Employee Information**

Field Name	Value
Employee ID:	KU0020
Job Code:	600145

[Return](#)

**Salary Proposals**

Plan	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Annual Rate	Compa-Ratio
Merit Pay	<input type="checkbox"/>	70,000.00	2,800.00	4.00	<input style="width: 50px;" type="text" value="0.00"/>	70,000.00	0.88

This example illustrates the fields and controls on the Manage Cycle Transactions - Direct Reports page (2 of 2).

Salary History									
Employee ID	Record	Date	Action	Reason	Currency Code	Change Amount	Change Percent	Annual	Monthly
KU0020	0	09/25/1982	Hire		USD	0.00	0.00	9,360.00	780.00
KU0020	0	10/01/1985	Pay Rate Change	Step Progression	USD	116.92	32.47	12,400.00	1,033.33
KU0020	0	07/01/1990	Pay Rate Change	Promotion	USD	320.00	66.66	20,800.00	1,733.33
KU0020	0	07/01/1990	Promotion	Normal Career Progression	USD	3.07	0.64	12,480.00	1,040.00
KU0020	0	07/07/1993	Pay Rate Change	Adjustment	USD	100.00	12.50	23,400.00	1,950.00
KU0020	0	05/04/1997	Pay Rate Change	Adjustment	USD	100.00	11.11	26,000.00	2,166.66
KU0020	0	02/04/2012	Pay Rate Change	Merit	USD	520.00	24.00	32,240.00	2,686.66
KU0020	0	12/01/2013	Data Change		USD	1,813.33	67.49	54,000.00	4,500.00
KU0020	0	04/01/2017	Data Change	Correction-Pay Rate	USD	1,333.33	29.63	70,000.00	5,833.33

Performance History			
Date	Manager Name	Document Type	Performance Rating
12/31/2007	Rosanna Channing	PERFORM	3
12/31/2006	Rosanna Channing	PERFORM	3
12/31/2008	Rosanna Channing	PERFORM	3

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

Field or Control	Description
<b>Save</b>	Click this button to save any changes you made have made to the proposal.
<b>Discard</b>	Click this button to discard any changes you made have made to the proposal.
<b>Return</b>	Click this button to return to the Manage Cycle Transactions page for the group.

### Salary Proposals

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

**Note:** The Salary Proposals group box is not available to cycles that support variable compensation only.

## Other Proposals

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

---

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

---

## Salary History

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

## Award History

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

## Performance History

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

---

## Administering Cycle Roles

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

### Page Used to Manage Cycle Roles

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Administer Cycle Roles Page</a>	WCS_ECM_CYC_ROL	Apply or modify compensation roles for groups within a compensation cycle.

## Understanding Cycle Roles

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

---

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

---

## Administer Cycle Roles Page

Use the Administer Cycle Roles page (WCS\_ECM\_CYC\_ROL) to apply or modify compensation roles for groups within a compensation cycle.

Navigation:

**Compensation > Compensation Cycles > Administer Cycle Roles > Administer Cycle Roles**

This example illustrates the fields and controls on the Administer Cycle Roles page.

### Administer Cycle Roles

Cycle ID FOCAL\_2011
Cycle Description Focal 2011 Salary and Bonus

**Funding Period**

Begin 01/01/2011	Description Focal 2011 Cycle
End 12/31/2011	

**Hierarchy** Personalize | Find | View All | First 1-4 of 4 Last

Empl ID and Record	Total Employees	Number of Assignments	Status
<input checked="" type="checkbox"/> Betty Locherty	11	2	Calculated
<input checked="" type="checkbox"/> Rosanna Channing	10	1	In Progress
<input type="checkbox"/> Edmund Donahue	2	1	Pushed Back
<input type="checkbox"/> Christelle Stevenson	2	1	Confirmed

**Betty Locherty** Personalize | Find | View All | First 1-2 of 2 Last

Employee ID	Name	Owner	*Access Type		
KU0007	Betty Locherty	<input type="checkbox"/>	Compensation Adminstr	<input type="checkbox"/>	<input type="checkbox"/>
KU0007	Betty Locherty	<input checked="" type="checkbox"/>	Submitter	<input type="checkbox"/>	<input type="checkbox"/>

### Funding Period

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

### Hierarchy

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

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

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



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

## Managing Compensation Cycle Role Access for Proxies

This topic discusses how to manage compensation cycle role access for proxies.

### Page Used to Manage Compensation Cycle Role Access for Proxies

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Manage Delegation Role Access Page</u>	WCS_ECMDLGT_RCTL	Update compensation cycle role access for proxies.

### Manage Delegation Role Access Page

Use the Manage Delegation Role Access page (WCS\_ECMDLGT\_RCTL) to update compensation cycle role access for proxies.

Navigation:

**Compensation > Compensation Cycles > Maintain Delegation Role Access > Manage Delegation Role Access**

This example illustrates the fields and controls on the Manage Delegation Role Access page.

**Manage Delegation Role Access**

Run Control ID T1 Report Manager Process Monitor

**Process Request Parameters**

Process Date 10/22/2020

The administrator needs to run the Delegation Access Role Process (WCS\_ECM\_DLGT) after a proxy (or delegate) accepts or rejects a delegated transaction (confirm, review or submit compensation proposals) using the My Delegated Authorities page (EODL\_DLGT\_AUTH\_PG), when a delegated transaction is revoked, or when the delegation period has ended. This process updates the role access to compensation cycles for proxies. It should be run regularly to keep cycle roles current, when the Delegation functionality is used in compensation cycles.

After this process has run successfully, the proxy information (in the case of accepted delegation) appears on the Administer Cycle Roles Page in the hierarchy of compensation cycles in which the delegator (Rosanna Channing in this example) has role access.

This example displays a proxy's role access for a compensation cycle after running the Delegation Access Role Process.

**Administer Cycle Roles**

Cycle ID: FOCAL2019      Cycle Description: Focal 2019 Salary and Bonus

**Funding Period**

Begin: 01/01/2019      Description: 2019 Cycle  
End: 12/31/2019

**Hierarchy** ?

1-2 of 2 | View All

Empl ID and Record	Total Employees	Number of Assignments	Status
Betty Locherty	6	1	Calculated
Rosanna Channing	5	2	Calculated

**Rosanna Channing**

1-2 of 2 | View All

Employee ID	Name	Owner	*Access Type		
KU0046	Rosanna Channing	<input checked="" type="checkbox"/>	Submitter	+	-
KU0020	Christelle Stevenson	<input type="checkbox"/>	Submitter	+	-

**Related Links**

[Understanding Approvals and Delegations in Compensation](#)

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

This topic provides an overview on manual funding distribution and discusses how to manually distribute funding information.

### Pages Used to Manually Distribute Funding Information

Page Name	Definition Name	Usage
<a href="#">Fund Cycle by Group Page</a>	WCS_ECM_CYC_FBG	Modify calculated funding for a group of employees within a compensation cycle.
<a href="#">Fund Cycle by Individual Page</a>	WCS_ECM_CYC_FBI	Modify calculated funding for an individual employee within a compensation cycle.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Fund Cycle Manual Plans Page</a>	WCS_ECM_CYC_FMP	Enter funding for groups within a compensation cycle for manually funded variable compensation plans.

## Understanding Manual Funding Distribution

This component is used to manually enter cash, non-cash, and stock award data for variable compensation plans that have been configured with the funding calculation set to *Manual* on the [Define Compensation Cycles - Awards Page](#). Use these pages to manually fund cycles that are in the *Built* or *Canceled* status.

## Fund Cycle by Group Page

Use the Fund Cycle by Group page (WCS\_ECM\_CYC\_FBG) to modify calculated funding for a group of employees within a compensation cycle.

Navigation:

**Compensation > Compensation Cycles > Fund Cycle by Group > Fund Cycle by Group**

This example illustrates the fields and controls on the Fund Cycle by Group page.

**Fund Cycle by Group**

Cycle ID FOCAL\_2011      Cycle Description Focal 2011 Salary and Bonus

**Funding Period**

Begin	01/01/2011	Description	Focal 2011 Cycle
End	12/31/2011		

Empl ID and Record KU0007\_000      Betty Locherty

Display Name Betty Locherty      Currency Code USD

Merit Increase   Bonus Plan

**Funding Summary**

Description	Total Headcount	Total Salaries	Qualified Headcount	Qualified Salaries	Calculated Amount	Calculated Percent	Funded Amount	Funded Percent
Direct Reports	1	72,800.00	1	72,800.00	5,096.00	7.00	5,096.00	7.00
Indirect Reports	10	413,254.40	10	413,254.40	20,945.00	5.07	20,945.00	5.07
<b>Total Reports</b>	<b>11</b>	<b>486,054.40</b>	<b>11</b>	<b>486,054.40</b>	<b>26,041.00</b>	<b>5.36</b>	<b>26,041.00</b>	<b>5.36</b>

**Direct Reports Funding Detail**

Name	Exclude	Baseline Percent	Proration Factor	Calculated Amount	Funded Amount	Funded Percent
Channing,Rosanna	<input type="checkbox"/>	7.00	1.000000	5096.00	5096.00	7.00

---

**Note:** If the compensation cycle includes more than one plan (for example, merit increase and bonus plan), a tab for each plan appears below the Funding Summary group box to display plan-specific data. No tabs appear if there is only one plan (merit or variable compensation) in the cycle.

---

## Funding Summary

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

---

**Note:** Click **Save** to update the **Qualified Headcount, Qualified Salaries, Calculated Percent, and Funded Amount** fields for each plan within the group and groups that own the selected group.

---

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

---

## Direct Reports Funding Detail - Funding Information

<i>Field or Control</i>	<i>Description</i>
<b>Name</b>	Displays the name of the employee in the group. Click this link to access the Fund Cycle by Individual page.
<b>Exclude</b>	Select this check box if you want to exclude this employee from the funding cycle.
<b>Baseline Percent</b>	Displays the baseline percent that was established when the cycle was built.
<b>Proration Factor</b>	Displays the proration factor that was established before the cycle was built.
<b>Calculated Amount</b>	Displays the amount of the increase that was calculated based on the employee's current salary, baseline percent, and proration factor.
<b>Funded Amount</b>	Displays the amount that was funded based on the employee's current salary, baseline percent, and proration factor. Use this field to adjust the amount that is displayed in this field.

<b>Field or Control</b>	<b>Description</b>
<b>Funded Percent</b>	Displays the percent of the amount funded in relation to the current salary and funded amount for the employee. To calculate this number the system divides the amount in the employee's <b>Funded Amount</b> field by the amount in the employee's <b>Current Salary</b> field.

### Direct Reports Funding Detail - Employee Information

<b>Field or Control</b>	<b>Description</b>
<b>Name</b>	Displays the name of the employee in the group. Click this link to access the Fund Cycle by Individual page.
<b>Exclude</b>	Select this check box if you want to exclude this employee from the funding cycle.
<b>Employee ID</b>	Displays the ID of the employee.
<b>Empl Record</b>	Displays the employment record of the employee.
<b>Company</b>	Displays the company code associated with the employee.
<b>Job Code</b>	Displays the code associated with the employee.
<b>Salary Plan</b>	Displays the salary plan associated with the employee.
<b>Salary Grade</b>	Displays the salary grade associated with the employee.
<b>Current Salary</b>	Displays the employee's current salary.

### Fund Cycle by Individual Page

Use the Fund Cycle by Individual page (WCS\_ECM\_CYC\_FBI) to modify calculated funding for an individual employee within a compensation cycle.

Navigation:

- **Compensation > Compensation Cycles > Fund Cycle by Individual > Fund Cycle by Individual**
- Click the **Employee Name** link on the Fund Cycle by Group page.

This example illustrates the fields and controls on the Fund Cycle by Individual page.

**Fund Cycle by Individual**

Cycle ID FOCAL\_2011                      Cycle Description Focal 2011 Salary and Bonus

**Funding Period**

Begin 01/01/2011                      Description Focal 2011 Cycle

End 12/31/2011

Empl ID and Record KU0007\_000                  Betty Locherty

Node Status Calculated

**Individual Data**

Name Rosanna Channing                      Job Title Senior Accounting Manager

Employee ID KU0046                      Department Corporate Accounting

Empl Record 0                      Business Unit GBIBU

Last Start Date 08/29/1986                  Location Corporation Headquarters

Empl Status Active                      Notes

Review Rating E

Exclude All

**Salary Plans** <sup>?</sup>

Exclude	Description	Calculated Amount	Funded Amount
<input type="checkbox"/>	Merit Increase	5096.00	<input type="text" value="5096.00"/>

**Award Plans**

Exclude	Description	Calculated Award	Funded Award
<input type="checkbox"/>	Bonus Plan	3328.00	<input type="text" value="3328.00"/>

**Funding Period**

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

**Individual Data**

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

<i>Field or Control</i>	<i>Description</i>
<b>View Notes</b>	Click the <b>View Notes</b> button to access the Notepad page where you can enter additional information regarding the individual and their compensation.

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

## Salary Plans

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**Note:** The Salary Plans group box is not available to cycles that support variable compensation only.

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<b>Field or Control</b>	<b>Description</b>
<b>Exclude</b>	Select this check box if you want to exclude the individual from receiving any additional monies under their salary plan for this cycle.
<b>Description</b>	Displays a description of the salary plan.
<b>Calculated Amount</b>	Calculated during the cycle build process, this field displays the suggested amount by which you can increase the individual's salary.
<b>Funded Amount</b>	Enter the amount by which you want to increase the individual's salary.

## Award Plans

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

## Fund Cycle Manual Plans Page

Use the Fund Cycle Manual Plans page (WCS\_ECM\_CYC\_FMP) to enter funding for groups within a compensation cycle for manually funded variable compensation plans.

Navigation:

**Compensation > Compensation Cycles > Fund Cycle Manual Plans > Fund Cycle Manual Plans**



This example illustrates the fields and controls on the Funding Cycle Manual Plans page.

**Fund Cycle Manual Plans**

Cycle ID HXCMPBLT5      Cycle Description Cycle Built 5

**Funding Period**

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

**Adjusted Funding**

Total Qualified Headcount	7	Amount to Allocate	<input type="text"/>
Total Salaries	305000.00	Funding Allocated	0.00
Currency Code	USD	Available Funding	0.00

**Manual Funding** ⓘ

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

### Funding Period

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

### Adjusted Funding

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

<i><b>Field or Control</b></i>	<i><b>Description</b></i>
<b>Amount to Allocate</b>	Use this field to enter the amount that you want to manually allocate to the departments for the cycle that is displayed. When you click <b>Save</b> or click on an editable field, the system displays the amount in the <b>Available Funding</b> field.
<b>Funding Allocated</b>	Displays the total funding that was allocated in the <b>Allocation Amount</b> fields in the Manual Funding group box.
<b>Available Funding</b>	Displays the total amount of available funding that remains after the system subtracts the funding allocated amount from the amount to allocate.

## Manual Funding

<i>Field or Control</i>	<i>Description</i>
<b>Group Title</b>	Displays the name and the ID of the reporting group. If the group is based on Supervisor, the system displays the employee ID. If the group is based on Department, the system displays the department ID.
<b>Total Qualified Headcount</b>	Displays the total number of employees that are qualified for additional compensation for the reporting group for this cycle.
<b>Direct Headcount</b>	Displays the total number of direct reports that are included in the reporting group for this cycle.
<b>Total Salaries</b>	Displays the total salaried amount provided to employees within each reporting group that is displayed.
<b>Allocation Amount</b>	<p>Enter the amount that you want to allocate to the reporting group to fund employee compensation for the cycle. The system displays the amount in the <b>Funding Allocated</b> field in the <b>Adjusted Funding</b> group box.</p> <p>When additional amounts are added for other groups, the system adds all the amounts you entered to the <b>Funding Allocated</b> field.</p>

# Approvals and Delegations Integration

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## Understanding Approvals and Delegations in Compensation

### Approvals

Approvers of compensation proposals and ad hoc salary changes can approve or deny their pending requests using the Approvals tile. The system delivers setup to support the approval processes for the Allocate Compensation and Ad Hoc Salary Change transactions:

- *Approve Compensation Proposals*
- *Adhoc Salary Change*

These delivered approval transactions handle Compensation-specific validations and code needed to integrate with AWE. Compensation also delivers a set of functional rules called Approval Definition IDs. These functional rules were created to demonstrate and test the product integration to AWE. The Approvals Framework provides you the flexibility to define your own set of approval rules that fit your business process needs. You can define as many levels of approvals as you want, or choose to not have any level of approvals (auto approve).

See [Approving Compensation Allocation Using Fluid Approvals](#), [Approving Ad Hoc Salary Changes Using Fluid Approvals](#) and “Understanding Approvals” (Application Fundamentals).

### Delegations

Managers can delegate compensation proposal tasks to individuals in their organizations using Fluid Delegation. The system delivers these delegation transactions to provide managers the ability to specify proxies to act as reviewers, submitters, confirmers, or approvers of compensation proposals on their behalf:

- *Review Compensation Proposals*
- *Submit Compensation Proposals*
- *Confirm Compensation Proposals*
- *Compensation Approvals*

---

**Note:** When the proxy accepts the delegation as a reviewer, submitter, or confirmer, the administrator needs to run the Delegation Access Role process on the Maintain Delegated Role Access page process to load the proxy into the access role structure of the compensation cycle. This task is not needed for the *Compensation Approvals* delegation requests.

---

On the [Allocate Compensation - Select a Compensation Activity Page](#), proxies can view and access activities for which they accepted the authority from delegators.

See “Understanding Delegation” (Enterprise Components).



## Chapter 7

# Allocating Compensation Information

## Allocating Compensation

This topic discusses how to allocate compensation.

### Pages Used to Allocate Compensation

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Allocate Compensation - Select a Compensation Activity Page</u>	WCS_ECM_MSS_HOME	Review the status of the compensation cycles for which you have a role.  This page displays the compensation cycle, a description of the group associated with the cycle, the role of the manager who accessed the page, and the status of the compensation cycle.
<u>Allocate Compensation Page</u>	WCS_ECM_MSS_SUM	Enter changes to the proposed compensation amounts allocated to your direct reports. You can also navigate into any of your indirect groups to review their proposals.
<u>Allocate Compensation - Direct Reports Page</u>	WCS_ECM_MSS_DET	Enter changes to the proposed compensation amounts allocated to your direct reports and view additional details.
<u>Allocate Compensation Page (For Indirect Reports)</u>	WCS_ECM_MSS_SUM	Enter changes to the proposed compensation amounts allocated to your indirect reports.
<u>Job Changes Page</u>	WCS_ECM_RUL_DET	View details about the job change that took place for an employee.

### Allocate Compensation - Select a Compensation Activity Page

Use the Allocate Compensation - Select a Compensation Activity page (WCS\_ECM\_MSS\_HOME) to review the status of the compensation cycles for which you have a role.

Navigation:

**Manager Self Service > Compensation and Stock > Allocate Compensation > Allocate Compensation - Select a Compensation Activity**

This example illustrates the fields and controls on the Allocate Compensation - Select a Compensation Activity page.

[Allocate Compensation](#)

**Select a Compensation Activity**

Review and allocate compensation for your Employees.

Rosanna Channing

**Instructions**

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

**My Compensation Alerts**

Created	Message	Delete
12/06/2018	You have been granted a new role for a compensation cycle.	

**My Compensation Activities**

Cycle Name	Group Name	Role	Status
<a href="#">2016 Cycle 01</a>	Rosanna Channing	Submitter	Calculated
<a href="#">2016 Cycle</a>	Senior Accounting Manager	Submitter	Calculated
<a href="#">2017 Cycle 01</a>	Rosanna Channing	Submitter	Calculated
<a href="#">2017 Cycle 02</a>	Senior Accounting Manager	Submitter	Calculated
<a href="#">2018 Cycle 01</a>	Rosanna Channing	Submitter	Calculated
<a href="#">2018 Cycle 02</a>	Senior Accounting Manager	Submitter	Calculated
<a href="#">2013 Cycle</a>	Rosanna Channing	Submitter	In Progress

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

**My Compensation Alerts**

This section displays compensation alerts and notifications, if any, for the manager.

See [Compensation Alerts](#).

**My Compensation Activities**

This section displays the compensation cycle, a description of the group associated with the cycle, the role of the manager who accessed the page, and the status of the compensation cycle.

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

# Allocate Compensation Page

Use the Allocate Compensation page (WCS\_ECM\_MSS\_SUM) to enter changes to the proposed compensation amounts allocated to your direct reports.

You can also navigate into any of your indirect groups to review their proposals.

Navigation:

Click the link associated with the cycle that you want to update on the Allocate Compensation - Select a Compensation Activity page.

This example illustrates the fields and controls on the Allocate Compensation page (1 of 2).

**Allocate Compensation**

Rosanna Channing  
Current Role Submitter

**Instructions**  
You are viewing Rosanna Channing organization's plan data for the Focal 2013 Salary and Bonus with In Progress status. Please review the given information and make recommendations. You may make updates here or drill into each employee's data separately.

Planning Currency USD US Dollar

**Analytics**  
▼ Compensation Analytics

---

Rosanna Channing

**Organization Summary Data**

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
▼ Analytics	Merit Increase	9	397,134.40	13,440.00	14,440.00	-1,000.00
▼ Analytics	Bonus Plan	9	397,134.40	11,912.00	9,100.00	2,812.00

This example illustrates the fields and controls on the Allocate Compensation page (2 of 2).

**Direct Reports**

1-5 of 6 | View All

Name	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Annual Rate	Compa-Ratio	Salary Grade	Performance Rating
Donahue, Edmund	<input type="checkbox"/>	62,400.00	2,496.00	4.00	2,496.00	64,896.00	0.85	006	E
Lee, Mei	<input type="checkbox"/>	43,680.00	1,310.00	3.00	1,310.00	44,990.00	0.83	005	M
Quilligan, Shawn	<input type="checkbox"/>	48,006.40	960.00	2.00	960.00	48,966.40	0.92	005	N
Reese, Daryl	<input type="checkbox"/>	40,560.00	2,028.00	5.00	2,028.00	42,588.00	0.97	004	C
Stevenson, Christelle	<input type="checkbox"/>	32,240.00	967.00	3.00	967.00	33,207.00	1.05	003	M

**Indirect Reports**

1-2 of 2 | View All

Empl ID and Record	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status Date
KU0102_000	Edmund Donahue	Pushed Back	-1,000.00	60,008.00	1,800.00	3.00	2,800.00	4.67	09/05/14 3:12PM
KU0020_000	Christelle Stevenson	Submitted	0.00	53,040.00	1,591.00	3.00	1,591.00	3.00	09/05/14 3:23PM

[Return to Message & Alerts](#)

<b>Field or Control</b>	<b>Description</b>
<b>Save for Later</b>	Click this button if you want to save any changes you may have made and return to them at a later date.
<b>Discard Changes</b>	Click this button if you want to discard any changes you may have made.
<b>Submit</b>	When you click this button, the system sets the group status to <i>Submitted</i> . If the application is configured to alert other users to the changed status, it will send out an alert. The system only enables the <b>Submit</b> button if all the indirect groups are marked as <i>Submitted</i> .
<b>Push Back</b>	<p>When you click this button, the system sets the group status to <i>Pushed Back</i>. If the application is configured to alert other users to the changed status, it will send out an alert. The system only enables the Push Back button for groups that are in a <i>Submitted</i> status.</p> <hr/> <p><b>Note:</b> The system hides this button in Funding mode. This button is also hidden if the user has display-only access and if the user is not either the approver or manager of the immediate group.</p> <hr/>
<b>Confirm</b>	<p>Click this button to confirm and save any changes that may have been made to the proposal. The system displays this button only to those individuals that have Confirmer access role assigned for the selected group node.</p> <hr/> <p><b>Note:</b> The <b>Confirm</b> button is hidden if the AWE framework is enabled.</p> <hr/>
<b>Planning Currency</b>	This field comes from the Currency sub-page. The system hides this field, however, if the cycle does not allow currency conversion. The system converts all monetary values from the base currency (stored values) to the selected currency (derived values).
<b>Display Individual Data In</b>	<p>When you initially access this page, the system defaults this field to <i>Paid Currency</i>. To change the view of the amounts being proposed, select <i>Plan Currency</i>.</p> <p>This field appears if the Enable Currency Conversion field on the Self-service page of the Define Compensation Cycles component is selected.</p> <hr/> <p><b>Note:</b> The system displays data in the Organizational Summary and Indirect Reports sections in the planning currency. Direct Reports are displayed in the paid currency. Currency amounts are displayed with 2 decimals.</p> <hr/> <p>See Also <a href="#">Define Compensation Cycles - Self-Service Page</a></p>



<b>Field or Control</b>	<b>Description</b>
<b>Compensation Analytics</b>	<p>Click to select one of these pivot grids to view:</p> <ul style="list-style-type: none"> <li>• Compensation Distribution</li> <li>• Salary Analysis</li> </ul> <hr/> <p><b>Note:</b> Compensation Analytics links are not available to cycles that support variable compensation only.</p> <hr/> <p>See <a href="#">Understanding Compensation Pivot Grids</a>.</p>

The navigation path, which shows position, supervisor, or department names depending on the tree setup, indicates where you are in the tree structure and the tree node data that you are currently viewing.

Click a link to view the plan data of the corresponding position, supervisor, or department node.

### Organization Summary Data

This group box lists the information of each plan that is included in this compensation proposal, for example, the plan name, the total number of eligible employees in the plan, the total amount of eligible salaries, the total amount that has been funded for the plan, the total proposed amount for the compensation cycle, and the balance (total funded amount – total proposed amount). To view the same information for your direct reports, click the **My Direct Reports** tab.

If the proposal includes more than one plan (for example, merit increase and bonus plan), a tab for each plan appears below the Organization Summary Data group box to display plan-specific data.

---


**Note:** Salary-related (or merit-related) rows are not available to cycles that support variable compensation only.

---

<b>Field or Control</b>	<b>Description</b>
<b>Analytics</b>	<p>Click to select one of these pivot grids to view:</p> <ul style="list-style-type: none"> <li>• Salary Increase by Performance (for salary plans only).</li> <li>• Variable Compensation by Performance (for cash-type variable compensation plans only).</li> </ul> <hr/> <p><b>Note:</b> Analytics links are not available to cycles that support variable compensation only (plan type is set to <i>Variable Comp Only</i>).</p> <hr/> <p>See <a href="#">Understanding Compensation Pivot Grids</a>.</p>

## Direct Reports

Use fields in this group box to access the Allocate Compensation - Direct Reports page for your direct reports, add notes, exclude employees from the compensation cycle, and change compensation amounts for individual employees. The display of fields in this group box is configured on the Self-service page of the compensation cycle definition.

<b>Field or Control</b>	<b>Description</b>
<b>Name</b>	Click a name link to access the Allocate Compensation - Direct Reports page, view the salary and other proposal information for the employee, and proposed amount changes if necessary. Both salary and performance history for the employee is also available for review.
<b>View Alert</b>	Click to access the Job Changes page in a modal window and view the alert message prepared for the employee.  See <a href="#">Job Changes Page</a> .
<b>Exclude</b>	Indicate if the employee is removed from the compensation cycle either by: <ul style="list-style-type: none"> <li>• The Compensation Cycle Build process. An employee is excluded:                             <p>(For salary plans) If the employee’s hire date is greater than the new hire eligibility date, or if the employee’s status is not <i>Active, Leave, Paid Leave, or Suspended</i>.</p> <p>(For variable compensation plans) If no award (in the <i>Initial Calculation</i> status) exists for the employee.</p> </li> <li>• The compensation administrator. The administrator can update this option on the <a href="#">Fund Cycle by Group Page</a> or <a href="#">Fund Cycle by Individual Page</a> for the employee before the cycle is opened. Once the cycle is opened, the option cannot be edited unless the cycle is canceled first.</li> </ul> <p>When an employee is excluded from a cycle, the number of eligible employees is reduced along with the available funding.</p>
 <b>Add Notes</b>	Click the <b>Add Notes</b> button to access the Notepad page.

<b>Field or Control</b>	<b>Description</b>
<b>Change Amount</b>	<p>Enter the amount by which you want to change the employee's compensation. The system displays the amount in the <b>Total Proposed Amount</b> field in the <b>Organization Summary Data</b> group box when you click out of the field.</p> <p>As you make additional changes, the system adds the last change to the previous one until you have completed all the changes for the group displayed and saved or submitted the proposal.</p> <p>In addition, the system updates the amounts in the <b>Balance</b> and the <b>Proposed Percent</b> fields.</p>
<b>Proposed Percent</b>	<p>Enter the percentage by which you want to change the employee's compensation. The system changes the amount in the adjacent <b>Change Amount</b> field, updates the amount in the <b>Total Proposed Amount</b> field, and then either adds or subtracts the amount from the <b>Balance</b> field in the <b>Organization Summary Data</b> group box.</p>

## Indirect Reports

Use this group box, if available, to view compensation and group status information for the teams that report indirectly to you. Click the ID link of a department, position, or employee and record to access the Allocate Compensation page of that particular team in the hierarchy.

## Allocate Compensation - Direct Reports Page


Use the Allocate Compensation - Direct Reports page (WCS\_ECM\_MSS\_DET) to enter changes to the proposed compensation amounts allocated to your direct reports and view additional details.

Navigation:

Click the link associated with the direct report (employee) for which you to change or update compensation information from the Direct Reports section of the Allocate Compensation page.

This example illustrates the fields and controls on the Allocate Compensation - Direct Reports page (1 of 2).

**Allocate Compensation**  
**Direct Reports**  
 Rosanna Channing



Name: Edmund Donahue  
 Job Title: Manager-Accounting

[Save](#) [Discard](#) [Return](#)

**Employee Information**

Field Name	Value
Employee ID:	KU0102
Job Code:	600145
Department ID:	13111
Location Code:	KUNY00

**Salary Proposals**

Plan	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Annual Rate	Compa-Ratio
Merit Pay	<input type="checkbox"/>	62,400.00	2,496.00	4.00	<input type="text" value="2,496.00"/>	64,896.00	0.85

**Other Proposals**

Plan	Exclude	Funded Award	Funded Percent	Proposed Award	Total Cash Awards
Bonus Plan	<input type="checkbox"/>	1,872.00	3.00	<input type="text" value="200.00"/>	200.00

This example illustrates the fields and controls on the Allocate Compensation - Direct Reports page (2 of 2).

**Salary History**

Employee ID	Record	Date	Action	Reason	Currency Code	Change Amount	Change Percent	Annual	Monthly
KU0102	0	08/28/1998	Hire		USD	0.00	0.00	48,006.48	4,000.54
KU0102	0	07/01/2010	Pay Rate Change		USD	599.46	14.98	55,200.00	4,600.00
KU0102	0	07/01/2011	Pay Rate Change		USD	600.00	13.04	62,400.00	5,200.00
KU0102	0	12/01/2013	Data Change		USD	3,600.00	5.76	66,000.00	5,500.00

**Performance History**

Date	Manager Name	Document Type	Performance Rating
12/31/2007	Rosanna Channing	PERFORM	4
12/31/2008	Rosanna Channing	PERFORM	3
12/31/2011	Rosanna Channing	K0ANNUAL	N
12/31/2007	Rosanna Channing	K0ANNUAL	M
12/31/2008	Rosanna Channing	K0ANNUAL	N
12/31/2009	Rosanna Channing	K0ANNUAL	N
12/31/2010	Rosanna Channing	K0ANNUAL	M
12/31/2012	Rosanna Channing	K0ANNUAL	M

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

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

**Note:** The Salary Proposals group box is not available to cycles that support variable compensation only.

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

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

## Allocate Compensation Page (For Indirect Reports)

Use the Allocate Compensation page (for Indirect Reports) (WCS\_ECM\_MSS\_SUM) to enter changes to the proposed compensation amounts allocated to your indirect reports.

Navigation:

Click the link of the team that you want to update in the Indirect Reports section of the Allocate Compensation page.

This example illustrates the viewing of compensation proposals for indirect reports on the Allocate Compensation page.

**Allocate Compensation**

Betty Locherty  
Current Role Submitter

[Instructions](#)

Save for Later Discard Changes Submit

View Approvals Monitor

Planning Currency USD US Dollar

[Analytics](#)  
▼ Compensation Analytics

[Betty Locherty](#) > [Rosanna Channing](#) > [Christelle Stevenson](#)

**Organization Summary Data** ⓘ

**My Direct Reports** ||>

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
▼ Analytics	Merit Increase	2	53,040.00	1,591.00	1,591.00	0.00
▼ Analytics	Bonus Plan	2	53,040.00	1,591.00	1,591.00	0.00

**Merit Pay** Bonus Plan

**Direct Reports** ⓘ

Name	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Annual Rate	Compa-Ratio	Salary Grade	Performance Rating
<a href="#">Parker,Russell</a>	<input type="checkbox"/>	26,000.00	780.00	3.00	780.00	26,780.00	0.85	003	M
<a href="#">Strunsky,Joanna</a>	<input type="checkbox"/>	27,040.00	811.00	3.00	811.00	27,851.00	0.88	003	M

[Return to Message & Alerts](#)

The same [Allocate Compensation Page](#) is also used to view funded and proposed summary information for each salary plan and variable compensation plan configured within a given cycle for teams that report indirectly to you. The navigation path above the Organization Summary Data group box indicates the level in the tree structure and name of the supervisor, department, or position node you are currently viewing. The system computes summary information from indirect reports only. It does not include subgroups. The system also uses this page to display employee detail information. The detail information shown is specific to the selected salary or variable compensation plan. The system enables users to update proposed amounts unless they have display only access.

## Job Changes Page

Use the Job Changes page (WCS\_ECM\_RUL\_DET) to view details about the job change that took place for an employee.

Navigation:

Click the **View Alert** icon, if available, on the Allocate Compensation page.

This example illustrates the fields and controls on the Job Changes page.

The screenshot shows a window titled "Job Changes" with a sub-section "Salary Change". The details are as follows:

Employee Name	Stevenson,Christelle
Effective Date	02/04/2012
Currency Code	USD
HR Action	Pay Rate Change
Reason	MER
Old Salary	26,000.000000
New Salary	15,500,000
Change Percent	24.000
Explanation	This employee had a salary change during the open cycle.

At the bottom left of the window is a "Return" button.

This page displays details of the job change that occurred to the corresponding employee. It was recorded by the Job Change AE process.

If more than one job change has occurred to an employee (for example, a salary increase in a different currency code, the information for each job change type appears on this page in separate sections (Salary Change, Currency Change, and HR Status Change).

---

## Approving Compensation Allocation Using Fluid Approvals

This topic describes how to approve compensation allocation for employees using Fluid Approvals.

## Page Used to Approve Compensation Allocation Using Fluid Approvals

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Pending Approvals - Allocate Compensation Page</a>	EOAWMA_TXNHDTL_FL	Review and act on compensation allocation requests for groups.

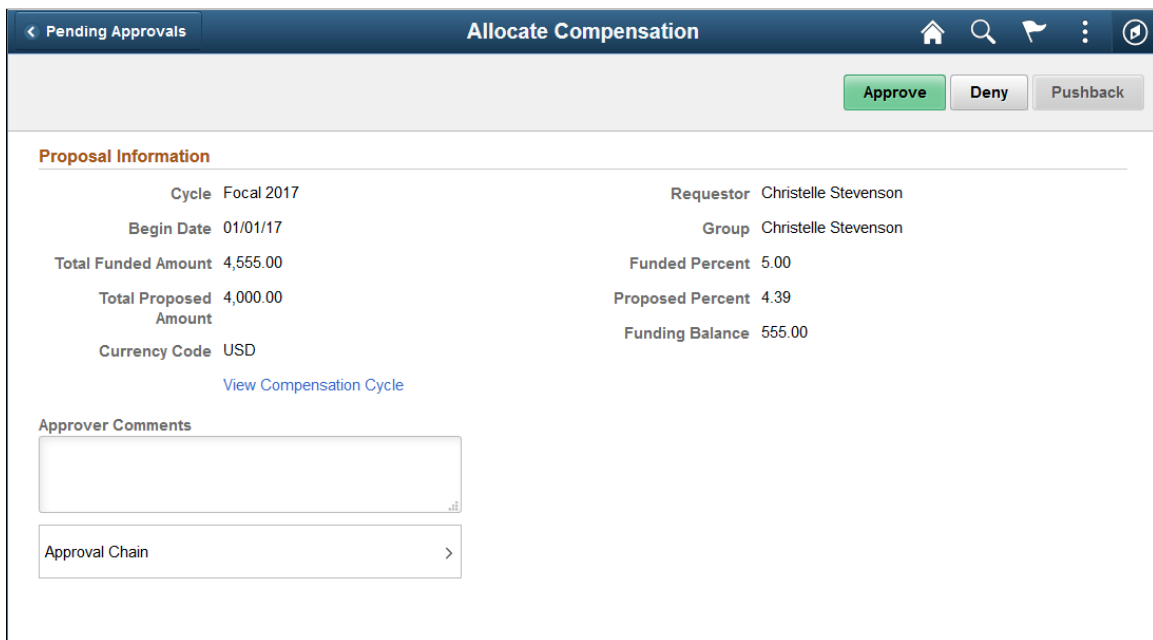
### Pending Approvals - Allocate Compensation Page

Use the Pending Approvals - Allocate Compensation page (EOAWMA\_TXNHDTL\_FL) to review and act on compensation allocation requests for groups.

Navigation:

On the Manager Self-Service home page, click the Approvals tile to access the Pending Approvals page. Then click an *allocate compensation* entry on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Allocate Compensation page.



Video: [Image Highlights, PeopleSoft HCM Update Image 20: HCM Fluid Approvals](#)

Video: [PeopleSoft HCM Fluid Approvals](#)

### Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Approve, Deny, and Pushback</b>	Use these buttons to take action on the requested approval.
<b>Approver Comments</b>	Enter any comments related to the approval action you take.
<b>Approval Chain</b>	Click this item to open the Approval Chain page (EOAWMA_APPC_SCF), where you can review information about all approvers for the transaction.

## **Proposal Information**

Fields in this section provide information about the compensation proposal you are being asked to approve.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>View Compensation Cycle</b>	Click to access and review the corresponding compensation cycle in detail on the Allocate Compensation page.



## Chapter 8

# Working with Pivot Grids in Compensation

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## Understanding Compensation Pivot Grids

PeopleSoft Pivot Grid is a PeopleTools technology that provides operational dashboard reporting. Pivot Grids are self-service, multi-dimensional analytics built into the applications that provide users with improved analytic capabilities and the business intelligence needed to make informed decisions. Compensation leverages this functionality and builds pivot grids that will streamline the process of viewing and analyzing data for users in compensation cycles.

Using pivot grids:

- Managers can view salary information in a graphical format to better understand the overall compensation levels of their employees. They are able to view and compare the performance rating and compensation levels of their direct and indirect reports to ensure that their employees are being compensated equitably according to their performance.
- Administrators are able to keep track of the status of all salary proposals within a compensation cycle, as well as identify the proposals that are outside the recommended guidelines that need follow-up.

Compensation delivers a number of pivot grids to provide quick, real-time reporting capabilities to administrators and managers during a compensation cycle. By default, they are displayed as charts but users can change to the display option easily to have them presented in the grid format.

Video: [PeopleSoft HCM 9.2 Pivot Grids](#)

Video: [Pivot Grid Overview](#)

For more information on the setup and capabilities of PeopleSoft Pivot Grid, see *PeopleTools: Pivot Grid*.

## Delivered Compensation Pivot Grids (Available on the Allocate Compensation Page)

### Salary Increase by Performance

This chart shows the percentage or amount allocated for all direct and indirect reports of a manager within a particular compensation cycle, broken down by performance rating. It helps managers to reward their employees commensurate with their performance level.

This pivot grid is available only for salary plans.

### Variable Compensation by Performance

This chart shows the amount allocated for all direct and indirect reports of a manager for a specific cash type variable compensation plan within a particular compensation cycle, broken down by performance

rating. Its functions are similar to the Salary Increase by Performance pivot grid except that it is built for cash-type variable compensation plans.

### Salary Analysis

This chart shows a comparison of salary compensation for all of a manager's employees, broken down by employee. Managers can drill into each data segment (bar, pie wedge, and so on) in the chart to view each employee's salary data and see how their team members compare to each other with respect to compensation.

### Compensation Distribution

This chart shows how the salary amounts of a manager's direct reports are distributed within their salary range. Managers can see where their employees are compared to their salary minimum, maximum and midpoint. They can drill into each data segment in the chart to view the compensation distribution of employees by job family or proposal status.

## Delivered Compensation Pivot Grids (Available on the Administer Compensation Page)

### Cycle Guidelines

This chart shows the numbers of allocation proposals that fall within and outside of the recommended guidelines, as defined by the minimum and maximum salary increase percentages. It provides drill-through capability for administrators to view the data by proposal status, group node, department, location, salary plan and so on. Administrators can use the group node entry to see who they might later want to follow up with regarding any proposals that fall outside the recommended guidelines.

### Cycle Tracking

This chart shows the total number of proposals, broken down by proposal status. It provides drill-through capability for administrators to view the data by location, job code, employee, and so on. When necessary, they can notify the appropriate people (shown in group node) regarding issues they find in the proposals.

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## Viewing Compensation Pivot Grids


This topic lists the common elements used in this section, and discusses how to view various compensation pivot grids.




### Pages Used to View Compensation Pivot Grids

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Allocate Compensation Page</a>	WCS_ECM_MSS_SUM	Access Compensation pivot grids.
<a href="#">Salary Increase by Performance Page</a>	PTPG_PGVIEWER	View the Salary Increase by Performance pivot grid.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Variable Compensation by Performance Page</u>	PTPG_PGVIEWER	View the Variable Compensation by Performance pivot grid.
<u>Salary Analysis Page</u>	PTPG_PGVIEWER	View the Salary Analysis pivot grid.
<u>Compensation Distribution Page</u>	PTPG_PGVIEWER	View the Compensation Distribution pivot grid.
<u>Administer Cycle Page</u>	WCS_ECM_CYC_ADM	Access Compensation pivot grids.
<u>Cycle Guideline Alert Page</u>	PTPG_PGVIEWER	View the Cycle Guideline Alert pivot grid.
<u>Cycle Tracking Page</u>	PTPG_PGVIEWER	View the Cycle Tracking pivot grid.

## Common Elements Used in This Section

<b>Field or Control</b>	<b>Description</b>
 <b>Options Menu</b>	Click to open the Options Menu and select an action to perform on the pivot grid model.
<b>View Grid</b>	Click to view data in the grid format in a new modal window. You can change how data is presented in the grid by dragging and dropping segment data to a different axis.
<b>Update Filters</b>	Click to add or remove filters to be available for use in the pivot grid model.
<b>Chart Options</b>	Click to open the Chart Options modal page where you can change the chart layout, and information displayed on chart axes.
<b>Export Data</b>	Click to export the underlying PSQuery data into a spreadsheet.
<b>Reset</b>	Select to delete all personalization of the current model and reset the model to the default layout, if applicable..
<b>Save</b>	Click to save the current grid and chart layout as the default view of the current model.

<b>Field or Control</b>	<b>Description</b>
<b>Save As</b>	Click to save copy the current pivot grid model and save it as a different one.
<b>Sort Option</b>	Click the update the current sort order, if applicable.
<b>Rows</b>	Displays the filters (maximum of 2) for the model that are used as its X-axis and series.  If two filters are selected, the first one becomes the X-axis and the second one becomes the series (legend).
<b>Columns</b>	Displays all the facts for the model that you can select as its Y-axis.  Click a fact to make it the model's Y-axis.
 <p><b>Pivot Grid Chart Types</b></p>	Click to display data in the chart type represented by the icon. Available chart types include vertical bar (default value), line, pie and horizontal bar.
	Click to show or hide the filters on the left panel. When a pivot grid model is loaded initially, filters are hidden by default.
<b>Filters or Facets</b>	They are displayed on the left panel if shown, as selected in the Update Filters option. Users can use the available filters to change the data to be displayed in the pivot grid model.
 <p><b>Drag</b></p>	Click to drag the corresponding filter to the Columns or Rows region above the model and change how the model is presented.  A filter cannot be dragged if the Drag icon appears inactive (in lighter gray color). If a filter is active, orange dotted lines appear as the borders of the filter box when you drag it.

See the *Viewing Pivot Grid Models in Fluid Mode* topic in *PeopleTools: Pivot Grid* product documentation for additional examples on the use of pivot grid controls.

## Salary Increase by Performance Page

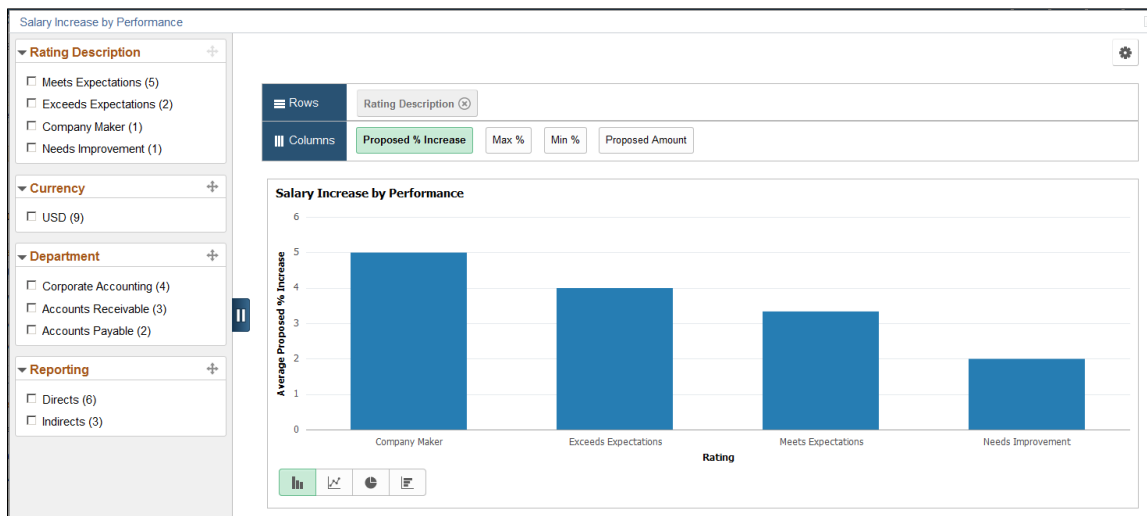
Use the Salary Increase by Performance page (PTPG\_PGVIEWER) to view the Salary Increase by Performance pivot grid.

Navigation:

**Manager Self Service > Compensation and Stock > Allocate Compensation**

Click the **Analytics** link of a salary plan (like Merit Increase) and then the **Salary Increase by Performance** link on the Allocate Compensation page.

This example illustrates the fields and controls on the Salary Increase by Performance pivot chart.



You can click a bar to see the detailed view of the data represented by that bar in a grid:

This example illustrates the fields and controls on the Detailed View of the Salary Increase by Performance pivot grid.

Salary Increase by Performance											
Employee Name	Rating Description	Rating	Rating Type	Proposed Amount	Proposed % Increase	Currency	Min %	Max %	Reporting	Job Code	Department
Reese,Daryl	Company Maker	C	REVIEW_RATING	2028.000000	5.00	USD	3.00	7.00	Directs	Financial Analyst	Corporate Accounting

### Information Displayed in the Salary Increase by Performance Pivot Grid

The Salary Increase by Performance pivot grid provides managers a snapshot of the proposed salary increase percentage for each performance rating. They can drill down into a performance rating to find out how many employees (direct and indirect reports) fall into that rating and who they are. Information provided in this pivot grid allows managers to reward their employees commensurate with their performance level.

**Important!** In order for performance data to be retrieved for use in this pivot grid, integration with PeopleSoft ePerformance is required.

When viewed in the grid format, this pivot grid displays the minimum and maximum percentages of salary increase available to an employee, which is defined on the Salary page of the compensation cycle definition. If such information is not available for the employee in the system, the values will be displayed as zero for the employee in the chart.

Data displayed in this pivot grid pertains to the compensation cycle from which the pivot grid is generated and it is available only for salary plans. It is not available to variable compensation plans.

The initial view of the pivot grid shows the count of all salary increase proposals, broken down by rating.

When you click a segment of the pivot grid, you can select to:

- View the details of the segment in a grid format. For example, details of all salary increases initiated for the Exceeds Expectations rating.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Job Code
  - Employee Name

For example, a bar chart showing all salary increases initiated for the Exceeds Expectations rating, broken down by job code.

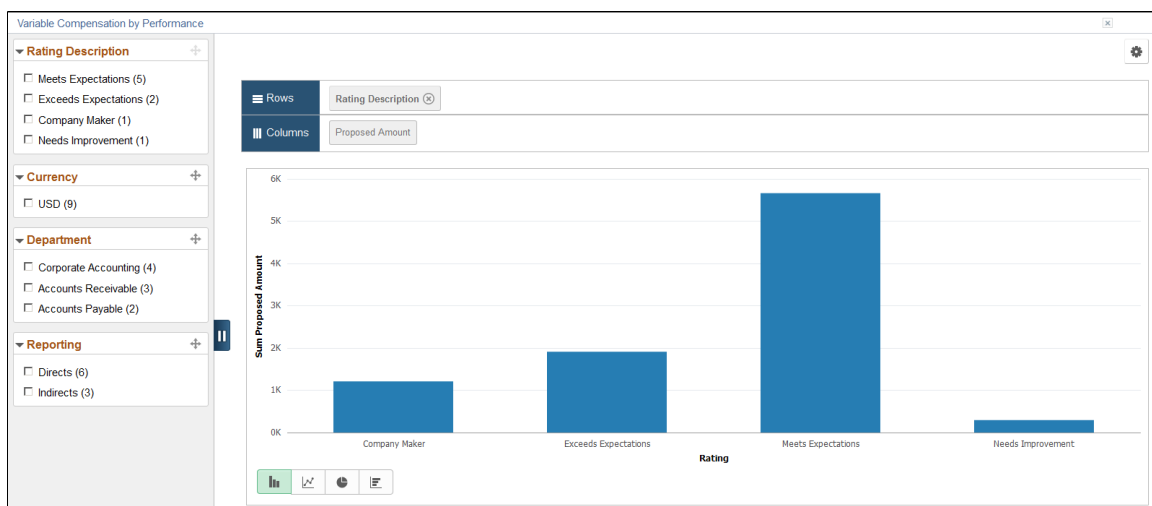
## Variable Compensation by Performance Page

Use the Variable Compensation by Performance page (PTPG\_PGVIEWER) to view the Variable Compensation by Performance pivot grid.

Navigation:

Click the **Analytics** link of a cash-type variable compensation plan (like Bonus Plan) and then the **Variable Compensation by Performance** link on the Allocate Compensation page.

This example illustrates the fields and controls on the Variable Compensation by Performance pivot chart.



### Information Displayed in the Variable Compensation by Performance Pivot Grid

The Variable Compensation by Performance pivot grid is similar to the Salary Increase by Performance pivot grid in purpose and functionality. The only differences are:

- The Variable Compensation by Performance pivot grid is built for variable compensation (non-salary) plans that are cash type plans.
- Proposed amount is shown as the only Y-axis. For the Salary Increase by Performance pivot grid, there are a number of facts you can select as the Y-axis..

---

**Important!** In order for performance data to be retrieved for use in this pivot grid, integration with PeopleSoft ePerformance is required.

---

The initial view of the pivot grid shows the summed proposal amounts of all cash-type variable compensation proposals, broken down by performance rating. When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format. For example, details of all variable compensation proposals initiated for the Exceeds Expectations rating.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Job Code
  - Employee Name

For example, a bar chart showing all variable compensation proposals initiated for the Exceeds Expectations rating, broken down by job code.

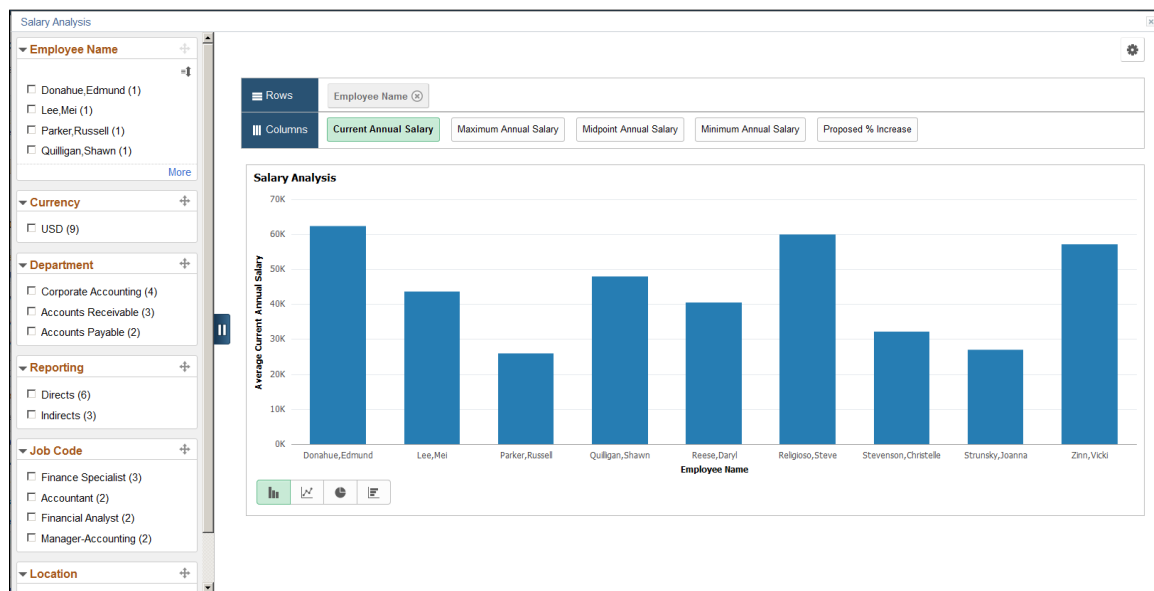
## Salary Analysis Page

Use the Salary Analysis page (PTPG\_PGVIEWER) to view the Salary Analysis pivot grid.

Navigation:

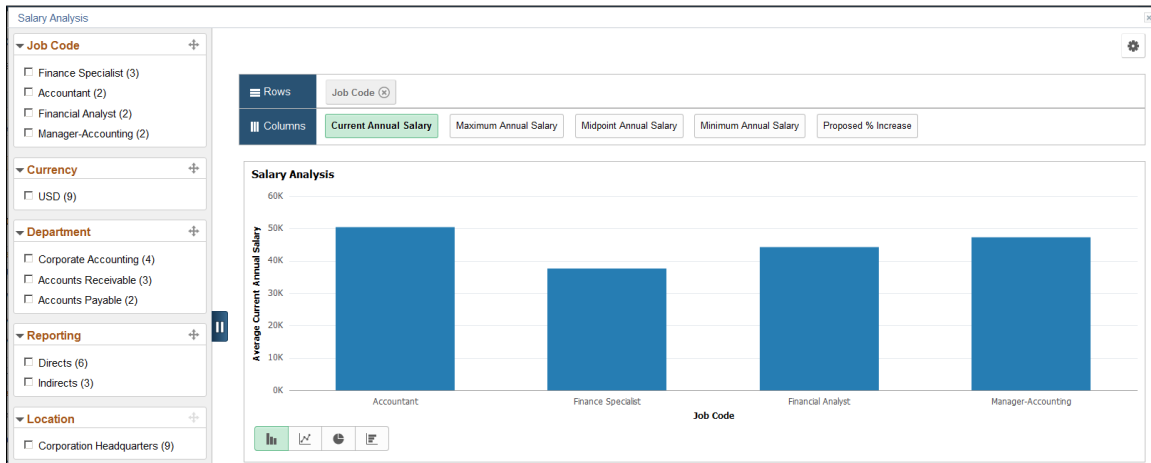
Click the **Compensation Analytics** link and then the **Salary Analysis** link on the Allocate Compensation page.

This example illustrates the fields and controls on the Salary Analysis pivot chart.



In addition to using filters, you can also change how data is displayed by changing the information represented in X-axis and Y-axis. To do so, drag a filter from the left panel and drop it in the Rows region, and remove the current filter if needed. For example, drag and drop the *Job Code* filter in the Rows region, and remove the *Employee Name* filter:

This example illustrates the fields and controls on the Salary Analysis pivot chart with Job Code as X-Axis.



### Information Displayed in the Salary Analysis Pivot Grid

Managers can use the Salary Analysis pivot grid to compare salary compensation for all their direct and indirect reports. When viewed in the grid format, this pivot grid displays the salary minimum, maximum, and midpoint of an employee, which is defined on the salary grade assigned to each employee. If such information is not available for the employee in the system, the values will be displayed as zero for the employee in the chart.

Data displayed in this pivot grid pertains to the compensation cycle from which the pivot grid is generated and it covers all salary plans within that cycle. Variable compensation plans are not included.

The initial view of the pivot grid shows the average current annual salaries of all direct and indirect reports of the manager, broken down by employee name. When you click a segment of the chart, you can select to view the details of the segment in a grid format, which is the salary information the selected employee.

## Compensation Distribution Page

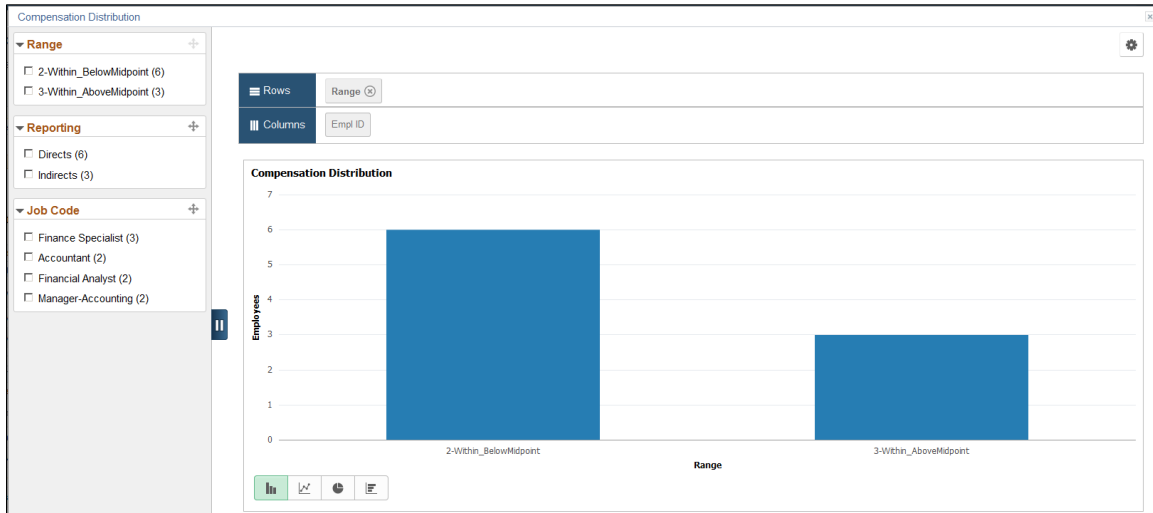
Use the Compensation Distribution page (PTPG\_PGVIEWER) to view the Compensation Distribution pivot grid.

Navigation:

Click the **Compensation Analytics** link and then the **Compensation Distribution** link on the Allocate Compensation page.

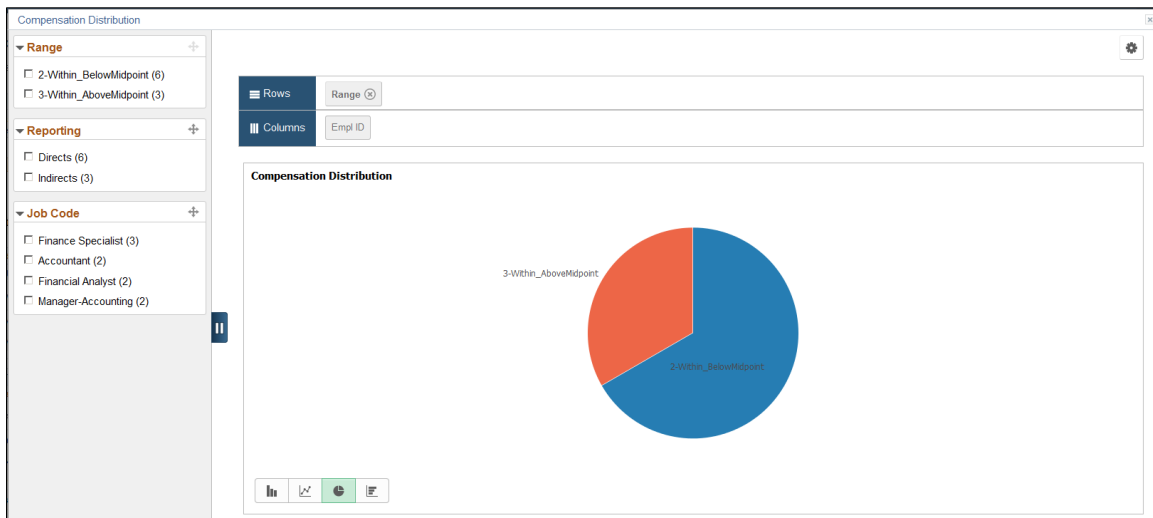


This example illustrates the fields and controls on the Compensation Distribution pivot chart.



You can click the Pie Chart icon to change the display format to pie chart:

This example illustrates the fields and controls on the Compensation Distribution pivot grid displayed as pie chart.



### Information Displayed in the Compensation Distribution Pivot Grid

From the Compensation Distribution pivot grid, managers can see how their employees are compensated in terms of salary pay, specifically, where they are in relation to their respective salary ranges.

Data displayed in this pivot grid pertains to the compensation cycle from which the pivot grid is generated and it covers all plans within that cycle.

The initial view of the pivot grid shows the employee count (direct and indirect reports of the manager) for each of these salary range categories:

- Below the salary range minimum
- Within the salary range, but below the salary midpoint

- Within the salary range and at or above the salary midpoint
- Above the salary range maximum

A salary range category is not visible if the corresponding count is zero.

When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format. For example, details of employees in the within or above mid-point category.
- View further drilldown of the segment data using these dimensions in the chart format:
  - Group Status
  - Employee Name
  - Job Family

For example, a bar chart showing employee counts in the within or above mid-point category, broken down by job family code.

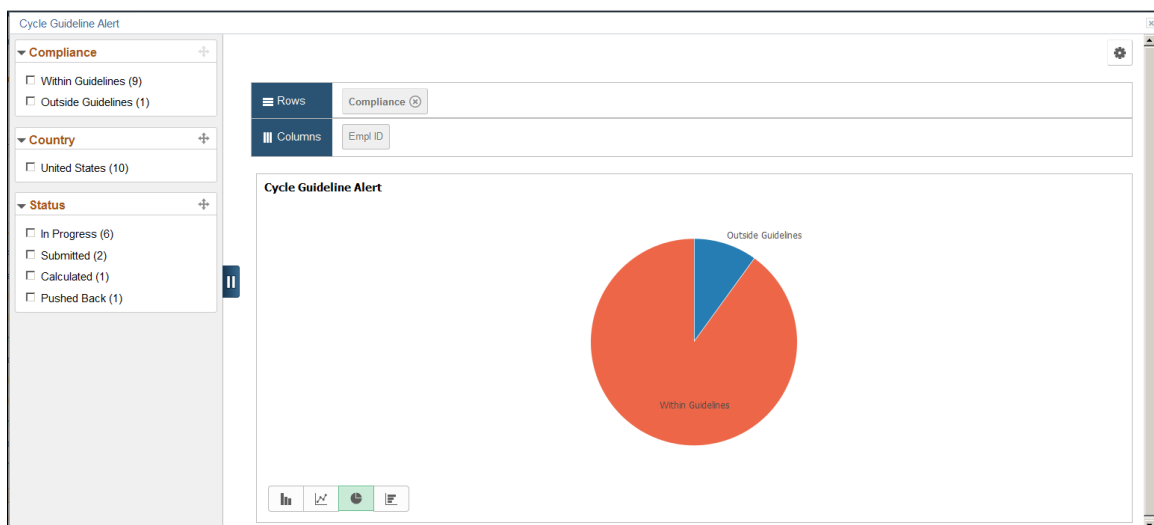
## Cycle Guideline Alert Page

Use the Cycle Guideline Alert page (PTPG\_PGVIEWER) to view the Cycle Guideline Alert pivot grid.

Navigation:

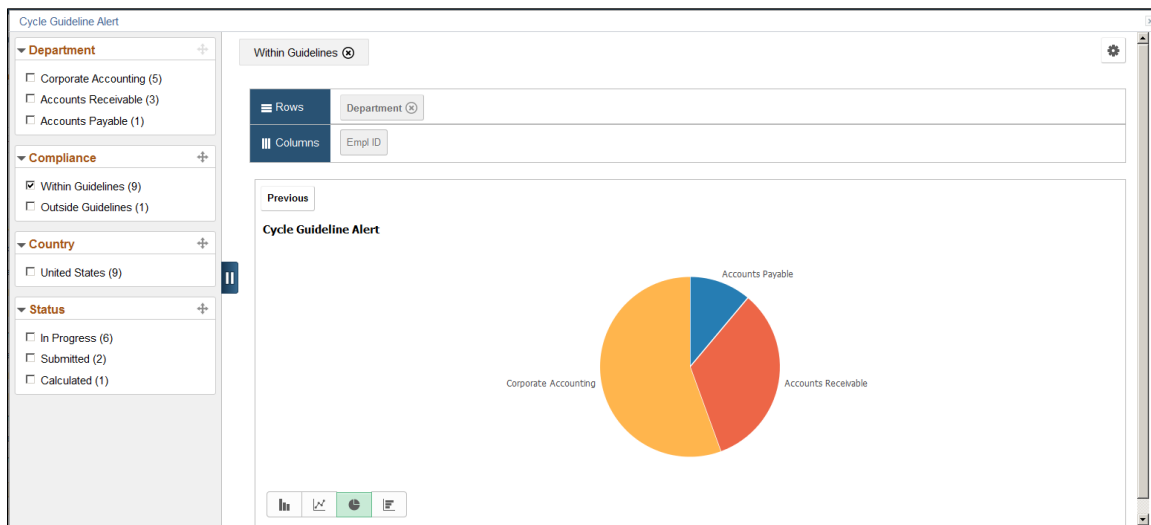
Click the **Compensation Analytics** link and then the **Cycle Guideline Alert** link on the Administer Cycle page.

This example illustrates the fields and controls on the Cycle Guideline Alert pivot chart.



You can click a bar and select to drill down that piece of data further, for example, by department:

This example illustrates the fields and controls on the Cycle Guideline Alert pivot chart by Department.



**Note:** This pivot grid is not available to cycles that are in any status prior to *Opened*.

### Information Displayed in the Cycle Guideline Alert Pivot Grid

From the Cycle Guideline Alert pivot grid, administrators can see the counts of salary allocation proposals that fall within, as well as outside of the recommended guidelines respectively. Data for this pivot grid is based on all salary proposals that are associated with the compensation cycle from which this pivot grid is generated.

**Note:** If none of the plans for the cycle contains a maximum allowed salary percentage increase, the pivot grid is not applicable and therefore not displayed under the **Compensation Analytics** link.

The initial view of the pivot grid shows the salary proposal counts, broken down by guideline compliance (*Within Guidelines* or *Outside Guidelines*). *Within Guidelines* refers to any proposals where the proposed percentage increase is equal to or greater than the minimum salary percent increase and *either* one of the following two conditions apply:

- The proposed percentage increase is equal to or less than the maximum salary percent increase.
- The maximum salary percent increase is zero.

Any proposals that do not meet these conditions are considered *Outside Guidelines*.

The system uses these formulas to calculate the proposed percentage increase for the Cycle Guideline Alert pivot grid:

Proposed Percentage Increase = Proposed Amount / Total Annual Salary \* 100 (if proposed amount > 0)

Otherwise,

Proposed Percentage Increase = Calculated Amount / Total Annual Salary \* 100

When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format, for example, details of all proposals that are within guidelines.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Group Node
  - Department
  - Salary Plan
  - Location
  - Job Code
  - Employee Name

For example, a bar chart showing all proposals that are within guidelines, broken down by department.

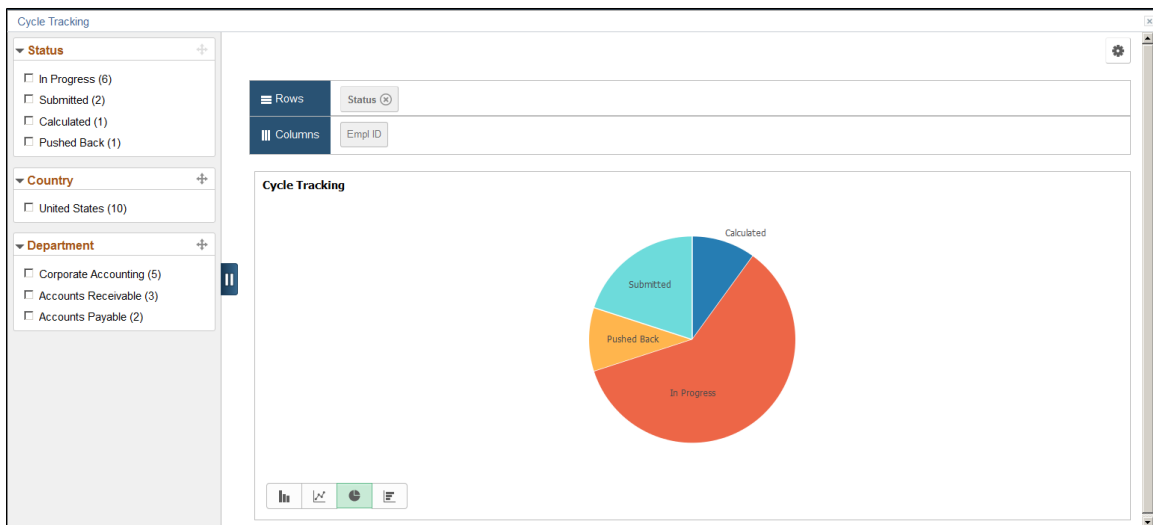
## Cycle Tracking Page

Use the Cycle Tracking page (PTPG\_PGVIEWER) to view the Cycle Tracking pivot grid.

Navigation:

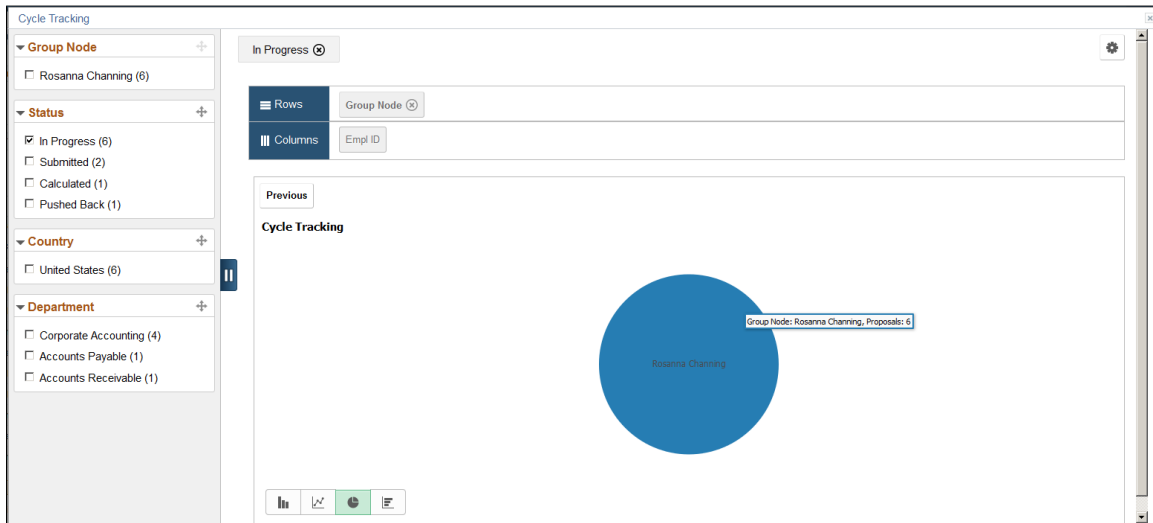
Click the **Compensation Analytics** link and then the **Cycle Tracking** link on the Administer Cycle page.

This example illustrates the fields and controls on the Cycle Tracking pivot chart.



You can click a bar and select to drill down that piece of data further, for example, by group node:

This example illustrates the fields and controls on the Cycle Tracking pivot chart showing data by group node.



The Cycle Tracking pivot grid gives administrators a quick status view of all salary allocation proposals pertaining to the compensation cycle from which the pivot grid is generated. The initial view of the pivot grid shows the proposal counts, broken down by status (Calculated, In Progress, Submitted, Pushed Back, Confirm, Ready to Load, and so on).

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**Note:** This pivot grid is not available to cycles that are in any status prior to *Opened*.

---

When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format, for example, details of all proposals in the Calculated status.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Group Node
  - Salary Plan
  - Location
  - Job Code
  - Employee Name

For example, a bar chart showing all proposals that are in the Calculated status, broken down by job code.



# Reviewing Employee Compensation

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## Understanding Compensation History

Managers use the Compensation History transaction to review or verify employees' compensation history. The Compensation History page contains:

- Access to a chart that displays compensation data of the employee in a graphical format by compensation source and time period.

If the employee has multiple jobs under the same manager, the same number of rows appear for the employee in the grid where the manager selects an employee and his or her job to review.

- A grid that displays the entire list of compensation changes pertaining to the employee's job, which include base salary, variable cash, variable non-cash, and stock option type changes.

Items are displayed in chronological order, with the most recent displayed first. The manager can click the date link to access a modal page to view additional information about the change.

### Conditional Navigation for Compensation History

When managers access the compensation history of employees through the menu navigation, global search or related actions, they are taken to either the fluid or classic version of the component depending on the presence of a user role. This behavior is known as conditional navigation.

If managers are members of the *Compensation Manager Fluid* user role, they are given access to the fluid version of the transaction on the [View Compensation History Page \(Fluid Manager View\)](#). Managers without this role view compensation history using the classic version of the transaction on the Viewing Compensation History page.

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## (Fluid) Setting Up and Reviewing Employee Compensation

This topic discusses how to set up and review employee compensation history using the Fluid User Interface.

Video: [Image Highlights, PeopleSoft HCM Update Image 28: Fluid Compensation History](#)

### Pages Used to Set Up and Review Employee Compensation Using Fluid

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Define Compensation History Page</a>	HR_EC_CONFIG_FL	Specify the setup options for displaying employee compensation history.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>View Compensation History - Find Team Member Page</u>	HR_PSEL_FLU	Select a direct or indirect report to view the employee's compensation history.
<u>View Compensation History Page (Fluid Manager View)</u>	HR_EC_HIST_SS_FL	Review employees' compensation history as a manager.
<u>Compensation History Page (Fluid Employee View)</u>	HR_EC_HIST_SS_FL	Review employee's own compensation history.
<u>Salary Change Details Page</u>	HR_EC_VC_AWD_SCF	View details of a specific salary change.
<u>Variable Cash Award Details Page</u>	HR_EC_VC_AWD_SCF	View details of a specific variable cash award.
<u>Stock Option Award Details Page</u>	HR_EC_VC_AWD_SCF	View details of a specific stock option award.

## Define Compensation History Page

Use the Define Compensation History page (HR\_EC\_CONFIG\_FL) to specify the setup options for displaying employee compensation history.

Navigation:

- **Set Up HCM > Product Related > Compensation > Compensation History > Self Service > Define Compensation History**
- Click the Compensation Administration tile on the Workforce Administrator home page, or on a home page to which the tile is added. On the Compensation Administration page that appears, navigate to **Self Service > Define Compensation History**.



This example illustrates the fields and controls on the Define Compensation History page.

### Define Compensation History

Save

Display Components of Pay  Yes

Include Stock Administration Awards  Yes

**Include Variable Compensation Awards**

Award Status	Award Status Description	Include
A	Approved	<input checked="" type="checkbox"/> Yes
D	Ready to Submit	<input checked="" type="checkbox"/> Yes
P	Paid/Granted	<input checked="" type="checkbox"/> Yes
S	Submitted	<input checked="" type="checkbox"/> Yes

As an administrator, you can configure the HCM system to display employees’ compensation history based on the viewing options and award statuses included on this configuration page.

**Important!** The setup options specified on the Define Compensation History page applies to the *fluid* version of the View Compensation History page only.

<i>Field or Control</i>	<i>Description</i>
<b>Display Components of Pay</b>	Indicate whether or not to display components of pay on the View Compensation History page.  If this option is set to <i>Yes</i> , pay components information is available for review on the modal page of base salary rows.
<b>Include Stock Administration Awards</b>	Indicate whether or not to display stock data in compensation history.

### Include Variable Compensation Awards

Use this section to specify the statuses of variable compensation awards to be included for viewing on the View Compensation History page. An award is not displayed, if it does not fall in any of the included statuses. This section allows you to hide from users awards information that they are not expected to see, for example, awards that have not yet been paid out.

## View Compensation History - Find Team Member Page

Use the View Compensation History - Find Team Member page (HR\_PSEL\_FLU) to select a direct or indirect report to view the employee’s compensation history.

Navigation:

**Manager Self-Service > Compensation and Stock > View Compensation History**

This example illustrates the fields and controls on the View Compensation History - Find Team Member page.

The screenshot shows the 'View Compensation History - Find Team Member' page. At the top, there is a navigation bar with 'Manager Self Service' and 'View Compensation History'. Below this, there is a search section with a 'Team Member' input field, an 'As Of' date field set to '02/24/2021', and a 'Search' button. The main content area is titled 'Team Members' and shows a list of three team members. Each entry includes a profile picture, ID, name, job title, status, position, and type. The first entry is Cynthia Adams (KU0101 - 0), Corporate Controller, Active, Position 19000074, Type Employee. The second is Diane Palmer (KOMTX005 - 0), Administrative Assistant, Active, Type Employee. The third is Franklin Ron (HXGSS100 - 0), QA Analyst, Active, Type Employee. There is a '2 Directs' link below the first entry and a '13 rows' indicator at the top right of the list.

ID	Name	Job Title	Status	Position	Type
KU0101 - 0	Cynthia Adams	Corporate Controller	Active	19000074	Employee
KOMTX005 - 0	Diane Palmer	Administrative Assistant	Active		Employee
HXGSS100 - 0	Franklin Ron	QA Analyst	Active		Employee

The View Compensation History - Find Team Member page displays all direct reports of the logged-in manager based on that manager's job.

For an explanation of fields and controls on this page, see the "(Fluid) <Transaction Name> - Find Team Member Page" (Application Fundamentals).

## View Compensation History Page (Fluid Manager View)

Use the View Compensation History page (HR\_EC\_HIST\_SS\_FL) to review employees' compensation history as a manager.

Navigation:

Select an employee on the View Compensation History - Select Employee page.

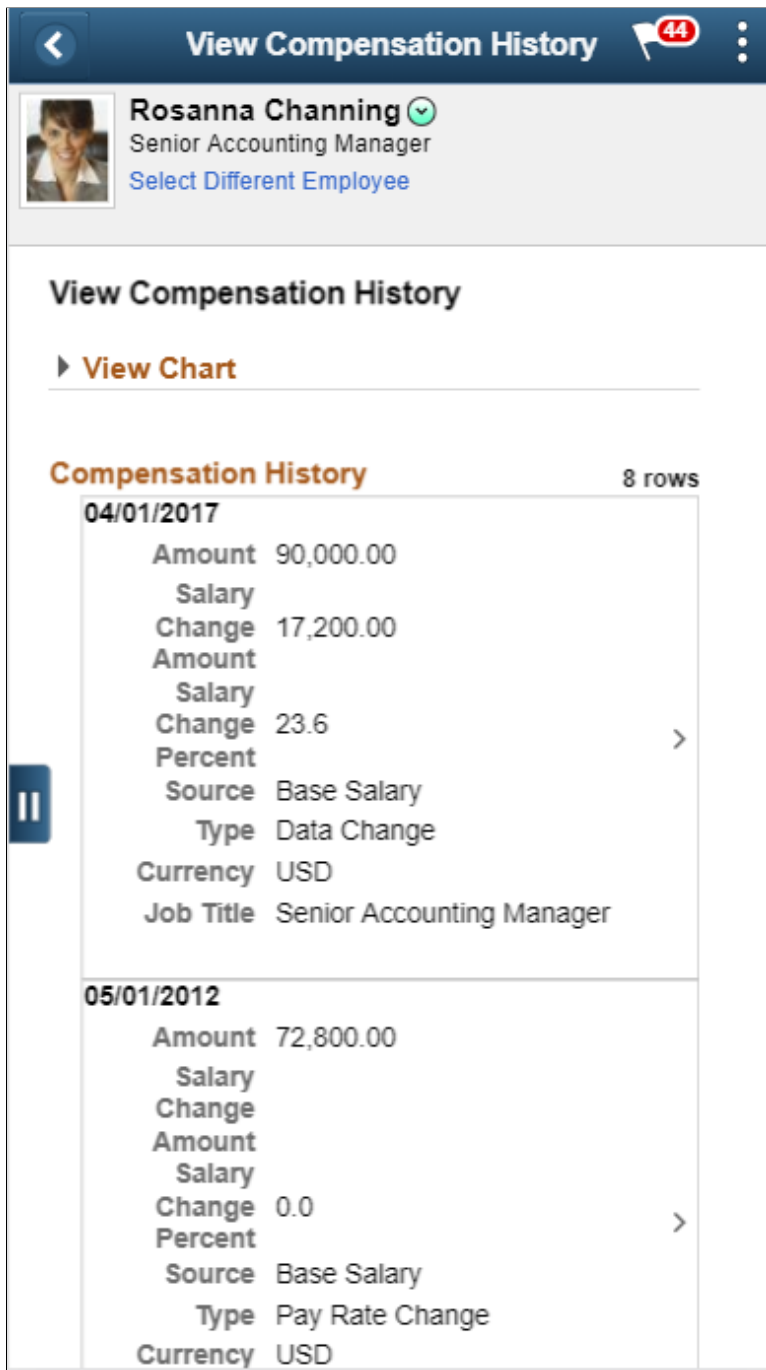
This example illustrates the fields and controls on the View Compensation History Page (Fluid manager view) (1 of 2).



This example illustrates the fields and controls on the View Compensation History page (Fluid manager view) (2 of 2).

Date of Change	Amount	Salary Change Amount	Salary Change Percent	Source	Type	Currency	Job Title
04/01/2017	90,000.00	17,200.00	23.6	Base Salary	Data Change	USD	Senior Accounting Manager >
05/01/2012	72,800.00	0.00	0.0	Base Salary	Pay Rate Change	USD	Senior Accounting Manager >
07/01/2011	72,800.00	6,240.00	9.4	Base Salary	Pay Rate Change	USD	Senior Accounting Manager >
02/11/2011	3,400.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager >
07/01/2010	66,560.00	6,552.00	10.9	Base Salary	Pay Rate Change	USD	Senior Accounting Manager >
02/15/2010	1,800.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager >
02/15/2009	1,200.00			Variable Cash	Discretionary Bonus	USD	Senior Accounting Manager >
08/29/1986	60,008.00	0.00	0.0	Base Salary	Hire	USD	Manager-Finance >

This example illustrates the fields and controls on the Fluid View Compensation History page when viewed using a smartphone.



Below the banner, the system displays the employee’s photo (based on configuration), name, job title, list of related actions that can be performed on the employee, as well as the **Select Different Employee** link that lets you to choose another person in your organization of whom to view the compensation history.

<b>Field or Control</b>	<b>Description</b>
<b>Apply</b>	Click to apply selected display and filter options to the compensation history chart and grid display.
<b>Reset</b>	Click to restore display and filter option fields to their default values (if available), and clear the current selections for those that do not have default values.

## Grid Display Options

(Optional) Use this section to specify the options used for displaying employees' compensation amounts on this page. When you select a different display option value, be sure to click the **Apply** button for the chart and grid to be updated accordingly.

<b>Field or Control</b>	<b>Description</b>
<b>Salary Frequency</b>	<p>Select the frequency in which compensation amounts are adjusted and displayed.</p> <p>The system populates this field with the default frequencies that are specified for the country of the company for which the employee works (the one that is selected on the current Job Data row of the employee being viewed). If no default frequencies are found for the company's country, these values (<i>Annual</i>, <i>Monthly</i>, <i>Daily</i>, and <i>Hourly</i>) become available for selection.</p> <p>Country-specific default frequencies are specified on the "Default Frequencies by Country Page" (Application Fundamentals).</p>
<b>View In</b>	Select to display compensation amounts either in the preferred currency of the logged on user (as specified on the General Profile Information page), or the currency in which the amounts were paid. By default, the preferred currency is used.

## Filter Options

(Optional) Use this section to specify the options used to filter the data that is displayed on this page. You can filter by:

- Source, for example, base salary, variable cash, variable non-cash, and stock option.
- Type
- Job title

- Time period: Select to show information for the last 5, 10, or 15 years. By default, the system shows all information.

Except for Time Period field, values of these drop-down fields are specific to the compensation data of the selected employee. For example, if the employee does not have any *Non-Cash* awards, this value is not be available as a source value.

When you select a different filter option value, be sure to click the **Apply** button for the chart and grid to be updated accordingly.

### View Chart

By default, the View Chart section is collapsed.

This bar chart displays the compensation history of the selected employee based on specified display and filter options. The chart displays one data point per year. For base salary, it is the final salary amount for that year; for variable cash, variable non-cash and stock option, it is the total amount received in that particular source for that year.

If no filter option is defined and the chart is set to display compensation history of all sources, each source value is displayed color-coded in a stacked bar for its year.

When the chart is set to display salary information along with any other source, the salary frequency used in the chart is always *Annual*, regardless of the frequency currently selected in the display option. This is to ensure that salary amounts and other source amounts are being shown consistently in the same time units.

### Compensation History

This grid lists the employee’s compensation awards information (one row for each distinct amount) that matches the award status and components of pay setup on the [Define Compensation History Page](#), and is filtered by the values selected in the Filter Options section. Award amounts are calculated and shown in the frequency (for salary amounts only) and currency that are specified in the Display Options section.

<b>Field or Control</b>	<b>Description</b>
<b>Salary Change Amount</b>	Displays the change of salary amount.  Salary change amounts are applicable to base salary rows only.

<b>Field or Control</b>	<b>Description</b>
<b>Salary Change Percent</b>	<p>Displays the change of salary amount in percentage.</p> <p>Salary change percent values are applicable to base salary rows only.</p> <p>Note that the salary change percent value could be displayed as <i>0.0</i> if:</p> <ul style="list-style-type: none"> <li>The value is too small (for example, 0.01) that when it is rounded to the nearest tenth, it becomes <i>0.0</i>.</li> <li>The value belongs to the first historical base salary row where there was no previous salary amount to perform the calculation.</li> </ul>
<b>Source</b>	Displays the source of awards information, which can be base salary, variable cash, variable non-cash, and stock option.

## Compensation History Page (Fluid Employee View)

Use the Compensation History page (HR\_EC\_HIST\_SS\_FL) to review employee’s own compensation history.

Navigation:

**Self Service > Payroll and Compensation > Compensation History**

This example illustrates the fields and controls on the Compensation History page (Fluid employee view).

The screenshot displays the 'Compensation History' page for Jason Lee, General Ledger Specialist. The main content area features a table with the following data:

Date of Change	Amount	Salary Change Amount	Salary Change Percent	Source	Type	Currency	Job Title
04/01/2017	43,000.00	32,000.00	290.9	Base Salary	Data Change	USD	General Ledger Specialist >
09/04/2012	11,000.00		0.0	Base Salary	Hire	USD	General Ledger Specialist >

The left sidebar includes 'Grid Display Options' (Salary Frequency: Annual, View In: Issued Currency) and 'Filter Options' (Source, Type, Job Title, Time Period: All).

The manager view and employee view of the Compensation History page are almost identical. The few differences are that for the employee view of the page, the employee photo is not displayed. If the employee being viewed has multiple jobs, the Job filter is displayed below the banner, allowing you to select which job compensation history to view.

<b>Field or Control</b>	<b>Description</b>
<b>Job</b>	Select a job to view its compensation history. This field appears if the employee being viewed has multiple jobs.  By default, the primary job is displayed. If there are multiple or no primary jobs defined, the one with the lowest current active job record number is shown.
<b>View In</b>	By default, the system displays compensation history amounts in the issued currency.

## Salary Change Details Page

Use the Salary Change Details page (HR\_EC\_VC\_AWD\_SCF) to view details of a specific salary change.

Navigation:

Click a base salary row on the View Compensation History page.

This example illustrates the fields and controls on the Salary Change Details page.

### Salary Change Details ×

**Date of Change** 04/01/2017

**New Salary** 90,000.00 USD

**Previous Salary** 72,800.00 USD

**Change Amount** 17,200.00 USD

**Change Percent** 23.6

**Frequency** Annual

**Pay Components**

Component	New Amount	Currency	Frequency	Change Amount	Change Percent
Default NA Annual	90,000.00	USD	Annual	17,200.00	23.6



---

**Note:** The title of this modal page and page detail change based on the source of the compensation row that is selected.

---

Pay Components information is available for review if the Display Components of Pay option is enabled on the [Define Compensation History Page](#).

## Variable Cash Award Details Page

Use the Variable Cash Award Details page (HR\_EC\_VC\_AWD\_SCF) to view details of a specific variable cash award.

Navigation:

Click a variable cash row on the View Compensation History page.

This example illustrates the fields and controls on the Variable Cash Award Details page.

Variable Cash Award Details	
Date of Change	02/15/2010
Award Amount	1,800.00 USD
Plan Description	2009 Bonus for Rosanna Channing and Group (KU0046)
Plan Type	Discretionary Bonus
Performance Factor	1.0000

## Stock Option Award Details Page

Use the Stock Option Award Details page (HR\_EC\_VC\_AWD\_SCF) to view details of a specific stock option award.

Navigation:

Click a stock option row on the View Compensation History page.

This example illustrates the fields and controls on the Stock Option Award Details page.

Stock Option Award Details
×

Date of Change 12/31/1998

Award Amount 25,000.00 USD

Plan Description 1990 - 1999 Annual ISO

Plan Type Stock - ISO

Number of Shares 2500.00

Grant Price Per Share 10.00 USD

## (Classic) Reviewing Employee Compensation

This topic discusses how to review employee compensation.

### Pages Used to Review Employee Compensation

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">View Compensation History - Employee Selection Criteria Page</a>	HR_DR_DIRECTREPORT	Select a direct or indirect report to view the employee's compensation history.
<a href="#">Compensation History Page (Classic Manager View)</a>	HR_ECOMP_MG_HIST	Review employee's compensation history as a manager.
<a href="#">Compensation History Page (Classic Employee View)</a>	HR_ECOMP_EE_HIST	Review employee's own compensation history.
<a href="#">Compensation History Chart Page</a>	HR_ECOM_CHART_SEC	View the compensation data changes in a graphical format.
<a href="#">Award Details Page</a>	HR_ECOMP_VC_SEC	View details of the corresponding compensation award (for example, base salary change or cash award).

## View Compensation History - Employee Selection Criteria Page

Use the View Compensation History - Employee Selection Criteria page (HR\_DR\_DIRECTREPORT) to select a direct or indirect report to view the employee's compensation history.

Navigation:

**Manager Self Service > Compensation and Stock > View Compensation History**

This example illustrates the fields and controls on the View Compensation History - Employee Selection Criteria page.

**View Compensation History**

**Employee Selection Criteria**  
Select the employee you'll be working with. You can initiate transactions only for employees who reported to you as of the date you entered on this page.

As Of Date: 04/19/2018  [Find Employee](#)

**Netty Owyang's employees**

Select	Name	Empl ID	Job	Empl Status	HR Status	Position
<input type="button" value="Select"/>	David Martignoni	KU0075	0	Active	Active	19000089
<input type="button" value="Select"/>	Karena Matheson	KU0083	0	Active	Active	19000046
<input type="button" value="Select"/>	<input checked="" type="checkbox"/> Marc Kessler	KU0068	0	Active	Active	19000018
<input type="button" value="Select"/>	Maria Sevilla	KU0053	0	Active	Active	19000106

The View Compensation History - Employee Selection Criteria page displays all direct reports of the logged-in manager based on that manager's job. If the manager has multiple jobs, he or she has the option to select the job to be used for the task and refresh the list of employees accordingly. The system uses the direct report configuration that is set up for the *View Compensation History* transaction (component name: HR\_ECOM\_MG\_HIST) to populate the manager's employee list on this page.

To view the compensation history of an employee, click the **Select** button on his or her row. You can also drill down to an employee's direct reports by clicking the icon next to the employee's name to expand the list.

To search for a specific direct or indirect report, click the **Find Employee** link, enter search criteria and click Search.

## Compensation History Page (Classic Manager View)


Use the Compensation History page (HR\_ECOMP\_MG\_HIST) to review employee's compensation history as a manager.

Navigation:

Select an employee on the Compensation History - Employee Selection page.

This example illustrates the fields and controls on the Compensation History page (Classic manager view).


**Compensation History**



Rosanna Channing

Senior Accounting Manager

Actions ▾




**Compensation History**

Date of Change	Amount	Change	Type	Source	Currency	Job Title
04/01/2017	90,000.00	17,200.00	Data Change	Base Salary	USD	Senior Accounting Manager
05/01/2012	72,800.00		Pay Rate Change	Base Salary	USD	Senior Accounting Manager
07/01/2011	72,800.00	6,240.00	Pay Rate Change	Base Salary	USD	Senior Accounting Manager
02/11/2011	3,400.00		Discretionary Bonus	Variable Cash	USD	Senior Accounting Manager
07/01/2010	66,560.00	6,552.00	Pay Rate Change	Base Salary	USD	Senior Accounting Manager
02/15/2010	1,800.00		Discretionary Bonus	Variable Cash	USD	Senior Accounting Manager
02/15/2009	1,200.00		Discretionary Bonus	Variable Cash	USD	Senior Accounting Manager
08/29/1986	60,008.00		Hire	Base Salary	USD	Manager-Finance

1-8 of 8 | [View All](#)

[Select a Different Employee](#)

<b>Field or Control</b>	<b>Description</b>
<b>Actions</b>	Click to expand the list of related actions that are available to the employee. Related actions provide users quick access to major self service transactions from one page instead of through traditional menu navigations.
 <b>Compensation History Chart</b>	Click to access the Compensation History Chart page in a modal window, and view the compensation data changes in a graphical format.
<b>Date of Change</b>	Click to view more information about the corresponding compensation change in a modal window.
<b>Issued Currency or Preferred Currency</b>	<p>Click to toggle between the currency in which the compensation was issued and the currency specified in the user profile. By default, the preferred currency is used in the grid and the charts.</p> <p>If data shown in the grid includes multiple currencies, the most recently used one will be used in the chart display.</p>


## Compensation History Page (Classic Employee View)

Use the Compensation History page (HR\_ECOMP\_EE\_HIST) to review employee's own compensation history.

Navigation:

**Self Service > Payroll and Compensation > Compensation History**

This example illustrates the fields and controls on the Compensation History page (Classic employee view).

Compensation History						
Betty Locherty 						
Compensation History						
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>☰</span> <span>1-7 of 7</span> <span>View All</span> </div>						
Date of Change	Amount	Change	Type	Source	Currency	Job Title
05/24/2000	5,000.00		Goal Sharing	Variable Cash	USD	Finance Director
12/31/1998	25,000.00		Stock - ISO	Stock Option	USD	Finance Director
12/31/1997	40,000.00		Stock - ISO	Stock Option	USD	Finance Director
12/31/1996	40,000.00		Stock - ISO	Stock Option	USD	Finance Director
12/29/1995	40,000.00		Stock - ISO	Stock Option	USD	Finance Director
12/31/1994	40,000.00		Stock - ISO	Stock Option	USD	Finance Director
04/07/1989	150,000.00		Hire	Base Salary	USD	Finance Director

**Issued Currency**

The manager view and employee view of the Compensation History page are almost identical. The few differences are that for the employee view of the page, the employee photo, job title, and the related actions list are not displayed. If the employee being viewed has multiple jobs, the Job filter is displayed in the compensation history chart, allowing you to select which job compensation history to view.

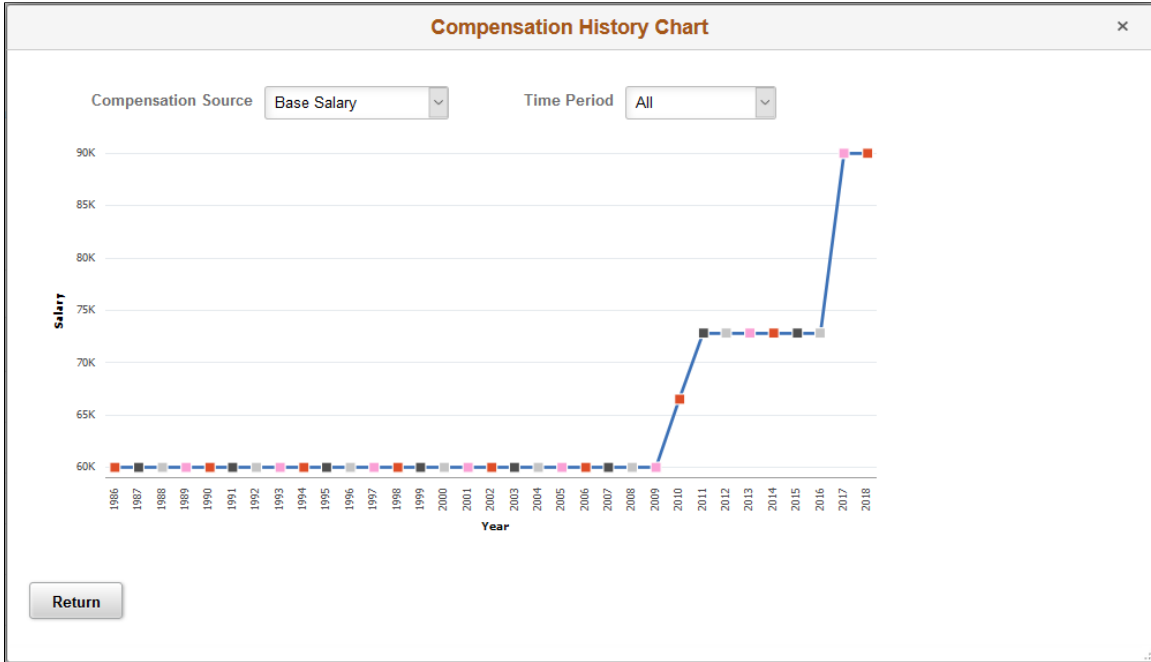
## Compensation History Chart Page

Use the Compensation History Chart page (HR\_ECOM\_CHART\_SEC) to view the compensation data changes in a graphical format.

Navigation:

Click the **Compensation History Chart** icon on the Compensation History page.

This example illustrates the fields and controls on the Compensation History Chart page (Classic).



<b>Field or Control</b>	<b>Description</b>
<p><b>Compensation Source</b></p>	<p>Select the type of history data used to plot the chart. The system supports these sources:</p> <ul style="list-style-type: none"> <li>• Base Salary (line chart)</li> <li>• Variable Cash (bar chart)</li> <li>• Stock Option (bar chart)</li> <li>• Variable Non-Cash (bar chart)</li> </ul> <p>If the employee doesn't have compensation changes at any particular source, the history chart for that source is not available for selection.</p>
<p><b>Time Period</b></p>	<p>Select the time period to filter compensation data to be displayed in the chart.</p> <p>Values are <i>All</i>, <i>Last 15 Years</i>, <i>Last 10 Years</i>, and <i>Last 5 Years</i>.</p>
<p><b>Job</b></p>	<p>Select the job you like to view the compensation data of in the chart. This filter is only available in Employee Self Service to employees who have more than one job.</p> <p>Data displayed on a chart is filtered by compensation source and time period in most cases. In Manager Self Service, a manager who has a direct report with multiple jobs (under the same manager) sees multiple rows for that employee in the Compensation History grid.</p>

## Award Details Page

Use the Award Details page (HR\_ECOMP\_VC\_SEC) to view details of the corresponding compensation award (for example, base salary change or cash award).

Navigation:

Click a date in the **Date of Change** column on the Compensation History page.

This example illustrates the fields and controls on the Award Details page (Classic).



The screenshot shows a window titled "Award Details" with a close button (X) in the top right corner. Below the title bar, the section "Salary Change Details" is displayed. The details are as follows:

Date of Change	04/01/2017	
Annual Salary	90,000.00	USD
Previous Annual Salary	72,800.00	USD
Change Amount	17,200.00	USD
Change Percent	23.626	

At the bottom left of the window, there is a "Return" button.

This page shows additional information about the selected row. Fields on this page change based on the source of the compensation change.





# Changing Employee Salaries When No Allocated Budget Exists

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## Understanding the Change Employee Salary Process

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

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**Note:** The Request Ad Hoc Salary Change and Approve Ad Hoc Salary Change transactions (classic version) are no longer supported. They are replaced by guided self-service transaction and approval functionality in Fluid. For more information about guided self-service transactions, performing and approving ad hoc salary requests in Fluid, see “Understanding Guided Self-Service Transactions” (PeopleSoft eProfile Manager Desktop) and “Compensation Details Page” (PeopleSoft eProfile Manager Desktop).

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

To complete the salary change process, a manager:

1. Accesses the Request Ad Hoc Salary Change page.

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

2. Selects an employee.
3. Enters information about the salary change.
4. Submits the request.

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

The approving manager:

1. Accesses the Approve Ad Hoc Salary Change page.
2. Approves or denies the salary change request for the employee.

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

---

**Note:** Using the View Ad Hoc Salary Change Status page, managers can check on the status of the request. Administrators access the Ad Hoc Salary Change page (administrator-specific) to view and process salary change requests, if needed.

---

## Prerequisites

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

1. Activate Workflow.
2. Set up group build if Group ID is going to be used as the access type for managers requesting salary changes for their direct reports.
3. Set up the access type for the Request Ad Hoc Salary Change transaction (the HR\_SALCHG\_MGR component) on the Direct Reports Transaction Configuration page.

### Related Links

- “Understanding Group Build” (Application Fundamentals)
- “Configuring Self-Service Transactions” (Application Fundamentals)
- “Configuring Direct Reports Functionality” (Application Fundamentals)

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## Changing Employee Salaries When No Allocated Budget Exists

This topic discusses how to change employee salaries when no allocated budget exists, by requesting ad hoc salary changes.

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**Important!** This Request Ad Hoc Salary Change feature (classic version) is no longer supported. It is replaced by the *Request Ad Hoc Salary Change* guided self-service transaction in Fluid. For ad hoc salary change approvals, approvers with access to Fluid Approval pages can process requests using the Approvals tile on the Manager Self-Service home page. For more information about guided self-service transactions, performing and approving ad hoc salary requests in Fluid, see “Understanding Guided Self-Service Transactions” (PeopleSoft eProfile Manager Desktop) and “Compensation Details Page” (PeopleSoft eProfile Manager Desktop).

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## Pages Used to Change Employee Salaries When No Allocated Budget Exists

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Request Ad Hoc Salary Change - Employee Selection Criteria Page</a>	HR_DR_DIRECTREPORT	Select employees for whom you want to make salary changes.
<a href="#">Request Ad Hoc Salary Change Page</a>	HR_SALCHG_EE	Enter new salary information for employees.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Approve Salary Change Page</a>	HR_SALCHG_APPR_L	Select the employee for whom you want to approve a salary change.
<a href="#">Approve Ad Hoc Salary Change Page</a>	HR_SALCHG_VW	Approve or deny each employee's salary change request and enter any relevant comments.
<a href="#">View Salary Change Status Page</a>	HR_SALCHG_VW_L	View the status of a salary change request.
<a href="#">Ad Hoc Salary Change - Administer Request Page</a>	WF_SALCHG_EE	Review and update salary change request statuses for final administrator approval.

## Request Ad Hoc Salary Change - Employee Selection Criteria Page

Use the Request Ad Hoc Salary Change - Employee Selection Criteria page (HR\_DR\_DIRECTREPORT) to select employees for whom you want to make salary changes.

Navigation:

**Manager Self Service > Compensation and Stock > Request Ad Hoc Salary Change > Request Ad Hoc Salary Change - Employee Selection Criteria**

This example illustrates the fields and controls on the Request Ad Hoc Salary Change - Employee Selection Criteria page.

**Request Ad Hoc Salary Change**

**Employee Selection Criteria**

Select the employee for whom you'd like to request ad hoc salary change. You can initiate transactions only for employees who reported to you as of the date you entered on this page.

As Of Date: 02/24/2021 Refresh Employees

Find Employee

Select	Name	Empl ID	Job	HR Status	Job Title	Department
Select	David Marignoni	KU0075	0	Active	Server-Food	Human Resources
Select	Karena Matheson	KU0083	0	Active	Project Manager	Lab Facility
Select	✚ Marc Kessler	KU0068	0	Active	Administrative Assistant	Human Resources
Select	Maria Sevilla	KU0053	0	Active	Consultant-Junior	Customer Service

Click to select the employee whose salary you want to change. To select someone who belongs to the organization of your direct report, click the **<number> Directs** link that appears for that direct report to show his or her organization. You can also search for employees by name, title, or email using the Team Member field.

## Request Ad Hoc Salary Change Page

Use the Request Ad Hoc Salary Change page (HR\_SALCHG\_EE) to enter new salary information for employees.

**Note:** Users without the fluid user role will be directed to the Classic Request Ad Hoc Salary Change page.

Navigation:

Select an employee on the Request Ad Hoc Salary Change - Employee Selection Criteria page.

This example illustrates the fields and controls on the Request Ad Hoc Salary Change page.

**Request Ad Hoc Salary Change**

**Diane Palmer**  
Administrative Assistant  
[Actions](#)

**Instructions**  
The employee you selected is displayed. Enter the desired salary change information for the employee and select Calculate New Total, then submit your salary change by selecting Submit.

\*Salary Change Date

Pay Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	Type	Frequency
Default NA Annual	19,600.00	0.510	100.00	19,700.00	USD	Flat Amount Annual

[Calculate New Total](#)

\$19,600.00 - Comp-Ratio - 0.69

	New Information	Current Information
Monthly Salary	\$0.00 USD	\$1,633.33 USD
Annual Rate	\$0.00 USD	\$19,600.00 USD
Comment		

[Submit](#)

[Return to Select Employees](#)

<b>Field or Control</b>	<b>Description</b>
<b>Actions</b>	Click to expand the list of related actions that are available to the employee. Related actions provide users quick access to major self service transactions from one page instead of through traditional menu navigations.
<b>Instructions</b>	Click to expand the section and review the text instruction for entering salary change requests for employees.

### Compensation Details

This section displays base pay components for which the manager is allowed to enter salary changes.

<b>Field or Control</b>	<b>Description</b>
<b>Change Percent</b>	If you want to change the salary amount by a specific percentage amount, enter that amount. Press the Tab key for the change and new amount values to update automatically.
<b>Change Amount</b>	If you want to change the salary amount by a flat amount, enter that amount. Press the Tab key for the change percent and new amount values to update automatically.
<b>New Amount</b>	If you want to just enter the new salary amount, enter that amount. Click either the Change Percent or Change Amount field for the values to update automatically.

## Slider Widget

The slider provides a graphical representation of the employee's salary in relation to the salary range of the employee's salary grade. It shows:

- The minimum, mid-point, and maximum amounts of the salary range for the employee's salary grade.
- The current (or the calculated amount after change is made) of salary of the employee, together with the compensation ratio.

## New Information and Current Information

These sections provide a quick view of the employee's current salary (employee's compensation frequency and annually) and the new numbers after the salary change takes effect.

<b>Field or Control</b>	<b>Description</b>
<b>Submit</b>	Click to submit the salary change request for the selected employee.  A confirmation message on the Submit Confirmation page (HR_SALCHG_CONFIRM) appears when the request has been submitted successfully.
<b>Return to Select Employees</b>	Click to start the process over again by returning to the previous page and selecting other employees.

## Approve Salary Change Page

Use the Approve Salary Change page (HR\_SALCHG\_APPR\_L) to select the employee for whom you want to approve a salary change.

Navigation:

**Manager Self Service > Compensation and Stock > Approve Ad Hoc Salary Change > Approve Salary Change**

This example illustrates the fields and controls on the Approve Salary Change page.

**Approve Salary Change**

The following list contains salary change requests requiring your approval. Select on an employee to view details and to process the approval.

Employee Salary Change Requests			
Name	Salary Change Date	Effective Sequence	Workflow Status
Diane Palmer	07/10/2017	1	In Approval Process

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

Click the desired employee name link to open the transaction for approval.

**Approve Ad Hoc Salary Change Page**

Use the Approve Ad Hoc Salary Change page (HR\_SALCHG\_VW) to approve or deny each employee's salary change request and enter any relevant comments.

Navigation:

Click the link of the ad hoc salary change you want to approve on the Approve Salary Change page.

This example illustrates the fields and controls on the Approve Ad Hoc Salary Change page (1 of 2).

**Approve Ad Hoc Salary Change**

**Diane Palmer**  
 Administrative Assistant  
[Actions](#)

[Instructions](#)

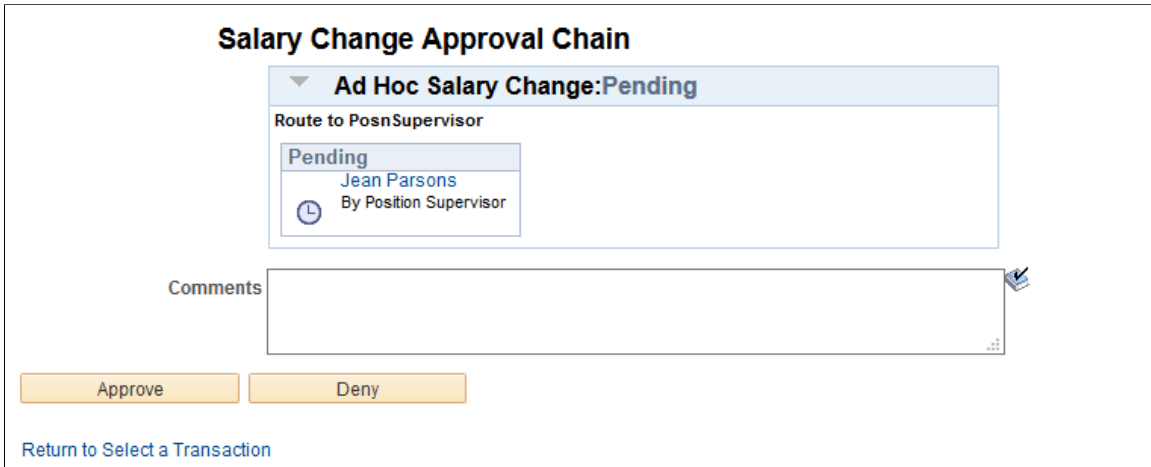
Salary Change Date 07/10/2017

Pay Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	Type	Frequency
Default NA Annual	19,600.00	0.510	100.00	19,700.00 USD	Flat Amount	Annual

\$19,700.00 - Comp-Ratio - 0.97

	New Information	Current Information
Monthly Salary	\$1,641.67 USD	\$1,633.33 USD
Annual Rate	\$19,700.00 USD	\$19,600.00 USD

This example illustrates the fields and controls on the Approve Ad Hoc Salary Change page (2 of 2).



The top part of the page displays the submitted salary request that is pending approval.

<b>Field or Control</b>	<b>Description</b>
<b>Comments</b>	(Optional) Enter a comment before approving or denying the salary change request.
<b>Approve or Deny</b>	Click to approve or deny the request.
<b>Return to Select a Transaction</b>	Click to return to the Approve Salary Change page and select a different transaction for approval.

A confirmation message on the Submit Confirmation page (HR\_SALCHG\_CONFIRM) appears when the request has been approved or denied successfully.

## View Salary Change Status Page

Use the View Salary Change Status page (HR\_SALCHG\_VW\_L) to view the status of a salary change request.

Navigation:

**Manager Self Service > Compensation and Stock > Ad Hoc Salary Change Status > View Salary Change Status**

This example illustrates the fields and controls on the View Salary Change Status page.

### View Salary Change Status

The following list contains employee salary change requests. Select an employee to view details.

Employee Salary Change Requests				
Name	Job Title	Salary Change Date	Effective Sequence	Workflow Status
<a href="#">Diane Palmer</a>	Administrative Assistant	07/10/2017	1	Administrator is Processing

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

Click the desired employee name link to view salary change request in more details. The system displays details of the corresponding salary change request on the View Ad Hoc Salary Change page (HR\_SALCHG\_VW), which looks almost identical to the [Approve Ad Hoc Salary Change Page](#), except that the ad hoc salary change status shown is different, and that the Approve and Deny buttons are not visible.

## Ad Hoc Salary Change - Administer Request Page

Use the Ad Hoc Salary Change - Administer Request page (WF\_SALCHG\_EE) to review and update salary change request statuses for final administrator approval.

Navigation:

**Workforce Administration > Self Service Transactions > Ad Hoc Salary Change Requests > Ad Hoc Salary Change - Administer Request**

This example illustrates the fields and controls on the Ad Hoc Salary Change - Administer Request page (1 of 2).

### Ad Hoc Salary Change

**Diane Palmer**

**Transaction Details**

Salary Change Date 07/10/2017

Workflow Status Administrator is Processing

Effective Sequence 1

Requested By Betty Locherty

Administrator action is required for this transaction. Select one of the options under Administrator Actions and then select Save.

Compensation Details							
Pay Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	Type	Frequency	
Default NA Annual	19,600.00	0.510	100.00	19,700.00 USD	Flat Amount	Annual	

\$19,700.00 - Comp-Ratio - 0.97

	New Information	Current Information
Monthly Salary	\$1,641.67 USD	\$1,633.33 USD
Annual Rate	\$19,700.00 USD	\$19,600.00 USD



This example illustrates the fields and controls on the Ad Hoc Salary Change - Administer Request page (2 of 2).

### Salary Change Approval Chain

**Ad Hoc Salary Change: Approved**

Route to Posn Supervisor

**Approved**

Jean Parsons  
By Position Supervisor  
07/10/17 - 1:02 PM

Administrator Processing

Administrator Betty Locherty

Comment

Administrator Actions

Current Transaction Status Administrator Action Required

- Select this option to approve the transaction and automatically update the database.
- Select this option to approve the transaction. You will be required to manually update the database.
- Select this option to cancel the transaction.

[Go To Job](#)

[Monitor Approvals](#)

### Administrator Actions

This section appears when it is the administrator’s turn to take action (status is *Administrator Action Required*).

Select an option in this section and then click **Save**. Depending upon your choice, the system:

- Approves the transaction and updates the database.
- Approves the transaction and requires you to manually update the database.
- Cancels the transaction.

The system changes the transaction status to *Success* or *Denied* based on the selection.

<b>Field or Control</b>	<b>Description</b>
<b>Go to Job</b>	Click to access the Job Data component for the employee.
<b>Monitor Approvals</b>	Click to access the Monitor Approvals page.

## Approving Ad Hoc Salary Changes Using Fluid Approvals

This topic describes how to approve ad hoc salary changes using Fluid Approvals.

See Also “Using PeopleSoft Fluid User Interface Self-Service Approval Transactions” (Application Fundamentals).

### Pages Used to Approve Ad Hoc Salary Changes Using Fluid Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Pending Approvals - Ad Hoc Salary Change Page</u>	EOAWMA_TXNHDTL_FL	Approve an ad hoc salary change.
<u>Salary Change Details Page</u>	HR_SALDTL_FL	View salary change entry details.
<u>Components of Pay Page</u>	HR_SALCHG_COM_SCF	View salary change details by pay component type.
<u>Salary Grade Information Page</u>	HR_SALCHG_GRD_SCF	View the entry’s salary grade data.

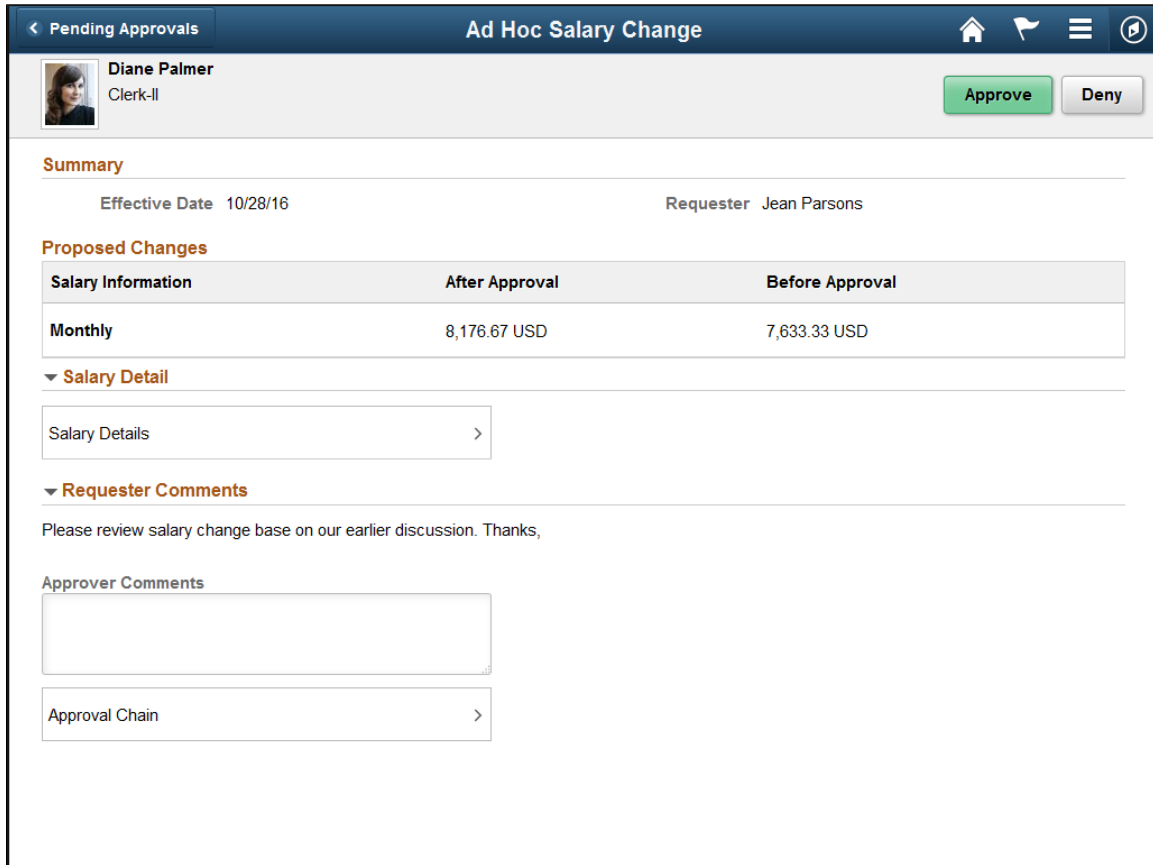
### Pending Approvals - Ad Hoc Salary Change Page

Use the Pending Approvals - Ad Hoc Salary Change page (EOAWMA\_TXNHDTL\_FL) to approve an ad hoc salary change.

Navigation:

On the Manager Self-Service home page, click the Approvals tile to access the Pending Approvals page. Then click an ad hoc salary change entry on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Ad Hoc Salary Change page.



Video: [Image Highlights, PeopleSoft HCM Update Image 20: HCM Fluid Approvals](#)

Video: [PeopleSoft HCM Fluid Approvals](#)

### Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

<b>Field or Control</b>	<b>Description</b>
<b>Approve and Deny</b>	Use these buttons to take action on the requested approval.
<b>Approver Comments</b>	Enter any comments related to the approval action you take.
<b>Approval Chain</b>	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

### Salary Detail

<i>Field or Control</i>	<i>Description</i>
Salary Change Detail	Click to access the <a href="#">Salary Change Details Page</a> to view change details before taking any approval action.

### Salary Change Details Page

Use the Salary Change Details page (HR\_SALDTL\_FL) to view salary change entry details.

Navigation:

Click the Salary Change Details item on the Pending Approvals - Ad Hoc Salary Change page.

This example illustrates the fields and controls on the Salary Change Details page.

Salary Change Details ×

**Proposed Changes**

Salary Information	After Approval	Before Approval	Change Amount
Monthly Salary	8,176.67 USD	7,633.33 USD	543.33 USD
Annual Salary	98,120.00 USD	91,600.00 USD	6,520.00 USD
Compa-Ratio	3.43	3.20	0.23
Position In Range	304.30	284.10	20.20

Components of Pay
>

Salary Grade Information
>

<i>Field or Control</i>	<i>Description</i>
Components of Pay	Click to access the <a href="#">Components of Pay Page</a> to view salary change details by pay component type.
Salary Grade Information	Click to access the <a href="#">Salary Grade Information Page</a> to view salary grade information.

## Components of Pay Page

Use the Components of Pay page (HR\_SALCHG\_COM\_SCF) to view salary change details by pay component type.

Navigation:

Click the Components of Pay item on the Salary Change Details page.

This example illustrates the fields and controls on the Components of Pay page.

The screenshot shows a window titled "Components of Pay" with a close button (X) in the top right corner. The window contains two sections of data:

Default NA Annual	
Before	19,600.00 USD
Change Percent	10.000%
Type	Flat Amount
After	21,560.00 USD
Change Amount	1,960.00 USD
Frequency	Annual

Defaulting Comp-Flat Base Rate	
Before	6,000.00 USD
Change Percent	6.000%
Type	Flat Amount
After	6,360.00 USD
Change Amount	360.00 USD
Frequency	Monthly

Use this page to view the proposed salary change by pay component type.

## Salary Grade Information Page

Use the Salary Grade Information page (HR\_SALCHG\_GRD\_SCF) to view the entry's salary grade data.

Navigation:

Click the Salary Grade Information or Salary Grade item on the Salary Change Details page.

This example illustrates the fields and controls on the Salary Change Information page.

Salary Grade Information			
<b>Summary</b>			
Job Code	Administrative Assistant-170005	Salary Plan	USA Salary Administration Plan - KU01
Salary Grade	Standard Pay Grade 2 - 002	Salary Step	0
Status	Full-Time	Standard Hours	40.00
<b>Description</b>			
Minimum	24,960.00	Midpoint	28,600.00
Maximum	32,240.00	Market Reference Point	29,804.00
<b>Proposed Changes</b>			
Compa-Ratio	3.43	Position In Range	304.30
Annual Salary	98,120.00		

Use this page to view the salary grade information of the salary change entry.

## Handling Errors or Warnings

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

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

- Successfully updated the database.
- Require further processing.

### Related Links

“Reviewing Transactions” (Application Fundamentals)

# Changing Budgeted Salaries for Employees

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## Understanding Budgeted Salary Changes

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

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

## Prerequisites

Before managers can enter salary change requests, you must:

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

### Related Links

[“Configuring Self-Service Transactions” \(Application Fundamentals\)](#)

[“Understanding the Base Compensation Budgeting and Planning Business Process” \(PeopleSoft Human Resources Manage Base Compensation and Budgeting\)](#)

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## Entering Budgeted Salary Change Requests

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

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

## Pages Used to Request Budgeted Salary Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Request Budgeted Salary Change Page	HR_SALCHGRP_LAUNCH	Initiate a salary change request by selecting a group ID.
Request Salary Change for Group with Allocated Budget Page	HR_SALCHBGT_BUDGET	Select a group to edit.
Change Employee's Salary Page	HR_SALCHBGT_SALPL	View component salary details and modify the proposed salary increase for an individual employee, then click <b>Continue</b> .
Change Salary Component Page	HR_SALCHBGT_SP_MC	Modify the proposed salary change amount for an individual component in the employee's compensation package, then click <b>Continue</b> .
Submit Confirmation Page	HR_SALCHBGT_CONFRM	Verify that the salary change request has been submitted.

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## Approving Budgeted Salary Changes

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

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

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**Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

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## Pages Used to Approve Budgeted Salary Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Approve Budgeted Salary Change Page	HR_SALCHGRP_APPR_L	Initiate a salary change approval by selecting a group ID.
Approve Salary Change for Group with Allocated Budget Page	HR_SALCHBGT_BGT_AP	Approve or deny the requested salary changes.

## Viewing the Statuses of Salary Changes

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

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

## Pages Used to View Salary Change Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
View Budgeted Sal Chg Status Page	HR_SALCHGRP_VW_L	View the status of a group salary change request by selecting the Group ID.
View Approval Status of Salary Change for Group with Allocated Budget Page	HR_SALCHBGT_BGT_VW	View the status of salary change requests for the selected group of employees.
Employee's Salary Change	HR_SALCHBGT_SAL_VW	View of the salary change detail of the selected employee.



## Chapter 12

# Using the PeopleSoft Fluid User Interface to Work with Compensation

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## Using the PeopleSoft Fluid User Interface to Manage Compensation Tasks as Administrators

This topic discusses a list of pages that administrators can access from a single place in the PeopleSoft Fluid User Interface to configure, manage and view compensation information.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

Video: [Image Highlights, PeopleSoft HCM Update Image 17: Workforce Administrator and Talent Administrator Homepages](#)

Video: [PeopleSoft Fluid User Interface Experience in HCM](#)

## Pages Used to Manage Compensation Tasks as Administrators Using the PeopleSoft Fluid User Interface

<i>Page/Tile Name</i>	<i>Definition Name</i>	<i>Usage</i>
<a href="#">Compensation Administration Tile</a>	HC_COMP_ADMIN_TILE_FL (cref for the tile)	Access administrator-specific pages to configure, manage, and view compensations.
Employee Compensation History “Employee Compensation History Page” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)	COMP_SUMMARY	View the history of all pay rate changes the worker has received to date.
Manage Cycle Transactions <a href="#">Manage Cycle Transactions Page</a>	WCS_ECM_MSS_SUM	Enter compensation proposal changes for individuals.
Adhoc Comp for Organization (adhoc compensation for organization)	TC_ADHOC_ORG	Add adhoc compensation for a group of workers.

<b>Page/Tile Name</b>	<b>Definition Name</b>	<b>Usage</b>
Calculate Group Budget “Calculating Base Compensation Budgets” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)	RUNCTL_CALCIBUDGET	Run the Budget Calculation application engine process.
Define Compensation Cycles <u>Defining Compensation Cycles</u>	WCS_ECM_CYC_DEF	Define compensation cycles.
Salary Plan “Salary Plan Page” (PeopleSoft Human Resources Administer Compensation)	SALARY_PLAN_TABLE	Define salary plan basics.
Salary Grades “Setting Up Salary Plans, Grades, and Steps” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)	SALARY_GRADE_TBL1	Specify the minimum, maximum, and midpoint rates for salary grades.
Define Salary Increase Matrix “Define Salary Increase Matrix Page” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)	SALARY_MATRIX_TBL	Establish the minimum and maximum percentage increases permitted for each review rating by quartile.
Automated Step Increment “Automated Step Increment Page” (PeopleSoft Human Resources Manage Base Compensation and Budgeting)	RUNCTL_CMP007	Move workers automatically to the next salary step when they complete the required time in the current step.
Administer Total Rewards “Viewing and Printing the Total Rewards Statement” (PeopleSoft Human Resources Administer Compensation)  The Total Rewards page is displayed if the selected employee views his or her statement in fluid mode.  The Administer My Total Rewards page is displayed if the selected employee views his or her statement in classic mode.	TRW_SS_STMT_NONE	Review compensation and benefit summary information of selected employees and reward periods.

<b>Page/Tile Name</b>	<b>Definition Name</b>	<b>Usage</b>
Administer Statement “Administer Statement Page” (PeopleSoft Human Resources Administer Compensation)	TRW_ADM_STMT	Define and process a total rewards statement.
Define Compensation History <u>Define Compensation History Page</u>	HR_EC_CONFIG_FL	Specify the setup options for displaying employees’ compensation history.

## Compensation Administration Tile

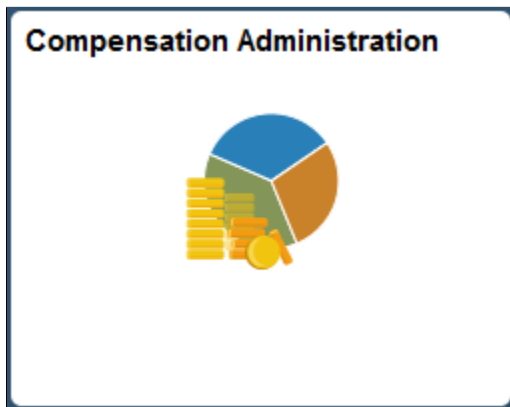
Use the Compensation Administration tile (HC\_COMP\_ADMIN\_TILE\_FL) to access groups of Fluid pages to configure, manage and view compensations.

Navigation:

Click the title of the default home page and select *Workforce Administrator* from the list that appears. The Compensation Administration tile is displayed on the Workforce Administrator page.

As an administrator, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

This example illustrates the (tablet) Compensation Administration tile.



This example illustrates the (smartphone) Compensation Administration tile.



Click the Compensation Administration tile to access the Compensation Administration application start page, which contains a list of administrator-specific pages for configuring, managing, and viewing compensations.

This example illustrates the pages that are displayed on the Compensation Administration application start page.

The screenshot displays the Compensation Administration application interface. The top navigation bar includes the title "Compensation Administration" and a "New Window" link. The left sidebar contains a menu with the following items: "Compensation Management" (expanded), "Employee Compensation History" (selected), "Manage Cycle Transactions", "Adhoc Comp for Organization", "Calculate Group Budget", "Compensation Configuration", "Total Rewards", and "Self Service". The main content area is titled "Employee Compensation History" and includes the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a "Find an Existing Value" button. The "Search Criteria" section contains several search fields, each with a "begins with" dropdown menu and a text input field: "Empl ID", "Empl Record" (with an "=" dropdown), "Name", "Last Name", "Second Last Name", "Alternate Character Name", and "Middle Name". A "Case Sensitive" checkbox is located below these fields. At the bottom of the search area are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

Pages are grouped into these tabs:

- Compensation Management
- Compensation Configuration
- Total Rewards
- Self Service