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PeopleSoft HCM 9.2: PeopleSoft Human Resources Manage Base Compensation and Budgeting

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Preface

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.

Typographical Convention	*Description*
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (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.

Typographical Convention	Description
⇒	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.

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.

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" (Application Fundamentals)

PeopleSoft Spotlight Series

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Chapter 1

Getting Started With Base Compensation and Budgeting

Base Compensation and Budgeting Business Processes

PeopleSoft Base Compensation and Budgeting uses these business processes:

- Salary administration plans.

- Salary increases (budgeting and planning).

- (FRA) Salary forecasts for France.

- (JPN) Salary updates for Japan.

- Mass salary increases.

- Merit increases (assignment and approval).

- Plan salary data (viewing and reporting).

We cover these business processes in the business process topics of this product documentation.

Base Compensation and Budgeting Implementation

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

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

This table lists the components and their setup component interfaces:

Component	Component Interface	References
COMP_RATECD_TBL	CI_COMP_RATECD_TBL	See "Setting Up Rate Codes" (PeopleSoft Human Resources Administer Compensation).
JOB_CODE_TBL	CI_JOB_CODE_TBL	See "Defining Job Subfunction and Job Function Codes" (Application Fundamentals).

Component	Component Interface	References
LOCATION_TABLE	LOCATION_TABLE	See "Establishing Locations" (Application Fundamentals).
SALARY_GRADE_TBL	SALARY_GRADE_TBL	See Setting Up Salary Plans, Grades, and Steps.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) article on My Oracle Support 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.

See Also *PeopleTools: Component Interfaces* and *PeopleTools: Setup Manager*.

Other Sources of Information

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

Related Links
Application Fundamentals

Chapter 2

Understanding Base Compensation and Budgeting

Base Compensation and Budgeting

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

Prerequisites

Before you begin planning worker salaries, make sure control table data and worker job data exists in PeopleSoft HR tables.

The following are some optional setup steps to consider:

- Enable workflow on the PeopleTools Workflow System Defaults page.

  Workflow is available in the worker review and salary increase budgeting and planning business processes.

- Select Rate Code Groups on the Installation Table - HCM Options page if your organization applies Percent-type rate codes to groups of pay components.

- Select Salary Points on the Installation Table - HCM Options page if your organization uses Points-type rate codes.

- Select Multi-Step Grade on the Installation Table - HCM Options page if you want the system to automatically enter step components in Job Data.

- (Optional) Create configurable matrices if you want to use a salary increase matrix to calculate a budget.

Related Links

"Creating Role Users Using a Message Agent" (Application Fundamentals)
"Setting Up Implementation Defaults" (Application Fundamentals)
Understanding Configurable Matrices

Common Elements Used to Work With Base Compensation and Budgeting

Field or Control	Description
Salary Administration Plan	A plan of salary defaults, grades, and step components.
Salary Increase Plan	A plan for increasing the salaries of individual workers in a group. This plan is based on a group salary increase budget.
Salary Plan	When used without further qualification, this term generally refers to a salary administration plan. In the <u>Understanding the Base Compensation Budgeting and Planning Business Process</u> topic of this documentation, *salary increase plans* are sometimes referred to as *salary plans*.

Base Compensation and Budgeting Business Processes

Base Compensation and Budgeting supports these business processes.

Salary Administration Plans

Using the Base Compensation and Budgeting business process, you can create salary administration plans to assign default compensation packages to workers at the location, job code, or worker level. Use these salary plans to move workers through step increases manually or automatically.

To set up and administer salary administration plans:

1. Set up salary plans, grades, and steps.

2. Tie the salary plans, grades, and steps to locations or job codes for defaulting into positions and worker compensation packages.

3. (Optional) Enter salary raises using the Automated Step Increase process.

4. View salary structures and generate reports.

Base Compensation Budgets and Plans

You can create base compensation budgets for groups of workers by defining increases for pay components. The system calculates the increase for all workers in the group who have the component in their compensation package. You can define budget increases by effective date, effective sequence, action, and action reason and compare multiple proposed budgets for a given group and budget period.

Create your salary increase plan by applying the budgeted increases to workers in the group. Manually adjust individual worker's raises based on compensation history and review results. Check the variance

between the budget totals and the salary plan totals, approve the raises when you're satisfied, and load them to the workers' Job Data records where they take effect on the effective date of the budget or the worker's anniversary date, depending upon how you defined the budget.

To budget and plan salary increases:

1. Create a salary increase group.

2. Set up defaults and controls for salary increase budgets and plans.

3. Create requested budgets, compare budgets, and optionally approve a budget.

4. Create a salary increase plan by applying budgeted increases to worker compensation and manually adjusting individual increases.

5. Approve the salary increase budget and plan.

6. Populate worker records with the approved increases.

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

Related Links

Understanding Salary Increase Budgeting and Planning

Understanding the Base Compensation Budgeting and Planning Business Process

Mass Salary Increase Processes to Update Salaries

In the Base Compensation and Budgeting Process menu, you'll find the following two processes to implement salary mass updates:

•   Update by Salary Plan and Pay Group.

•   Update by Job Code.

In addition to these processes, you can use PeopleTools mass change functionality and templates to update salary data.

Summary Data and Reports

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

•   Salary plan and grade structures.

•   Worker compensation history and summaries by worker, group, company, and department.

•   Worker review summaries and distribution analysis.

Base Compensation and Budgeting Integrations

HR integrates with other PeopleSoft applications and with third-party applications.

Tables shared by HR are available to many HCM applications. In addition, data in many of these tables is available to any PeopleSoft application that is set up to subscribe to the published messages. Base Compensation and Budgeting integrates with PeopleSoft Payroll for North America.

We cover integration considerations in this documentation.

Base Compensation and Budgeting Program Design

The core of Base Compensation and Budgeting comprises four main phases of operation:

1. Set up various supporting tables and salary grades and steps.

2. Create salary plans.

3. (Optional) Associate salary plans with job codes.

4. Assign workers to salary plans.

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

(FRA) Salary Forecasting Process Design

For organizations in France, Base Compensation and Budgeting functionality allows for additional salary forecasting capabilities by defining the following parameters:

- Compensation periods.

- Headcount increase and decrease events.

- Simulation parameters.

- Groups incentives and awards.

- Compensation increase events.

- Group promotions simulations.

- Seniority events.

- Calculation work weeks.

- Proration rules.

- Overtime rates.

- Scenarios and groups.

Salary Plan Administration

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

Chapter 3

Setting Up Base Compensation and Budgeting

Defining Salary Increase Guidelines Using a Configurable Matrix

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

See Also Understanding Configurable Matrices

This section discusses how to define salary increase guidelines using a configurable matrix.

Pages Used to Define Salary Increase Guidelines Using a Configurable Matrix

Page Name	Definition Name	Usage
Matrix Definition Page	WCS_LK_TBL_DEFN	Define and maintain matrices.
Inputs Page	WCS_LK_TBL_INPUTS	Define inputs for salary increase matrices.
Outputs Page	WCS_LK_TBL_OUTPUTS	Define outputs for salary increase matrices.
Search Keys Page	WCS_LK_TBL_KEYS	Specify the search keys to be used to match worker data used in salary increase matrices.
Load Configurable Matrix Keys Page	WCS_LK_TBL_KEY_SEC	Automatically load search keys for specific sources using a prompt table.
Data Content Page	WCS_LK_TBL_DATA	Enter values for the output data.
View Page	WCS_LK_TBL_VIEW	View the matrix as of the last saved version.

Matrix Definition Page

Use the Matrix Definition page (WCS_LK_TBL_DEFN) to define and maintain matrices.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Matrix Definition**

This example illustrates the fields and controls on the Matrix Definition page.

Field or Control	Description
Effective Date	Enter a date that is equal to or less than the budget period start date to be linked to the matrix.
Status	Select *Active*. The default value for all configurable matrices is *Inactive*. You must change the status to *Active* to use the matrix.
Matrix Type	Select *SALMATRIX*.

Inputs Page

Use the Inputs page (WCS_LK_TBL_INPUTS) to define inputs for salary increase matrices.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Inputs**

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

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

Outputs Page

Use the Outputs page (WCS_LK_TBL_OUTPUTS) to define outputs for salary increase matrices.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Outputs**

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

Field or Control	Description
Result ID	Select an output for the salary increase matrix. Typical outputs include minimum, default, and maximum percentages. You can have a maximum of 30 outputs for each matrix. These system-delivered values have default names; you can edit the labels to suit your business needs.

See Predefined Result IDs.

Search Keys Page

Use the Search Keys page (WCS_LK_TBL_KEYS) to specify the search keys to be used to match worker data used in salary increase matrices.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Search Keys**

This example illustrates the fields and controls on the Search Keys page.

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

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

Data Content Page

Use the Data Content page (WCS_LK_TBL_DATA) to enter values for the output data.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Data Content**

This example illustrates the fields and controls on the Data Content page.

Use this page to view input and output fields. You will enter the data values according to your salary guidelines. The columns that appear on this page vary depending on the fields you define on the Inputs page and Outputs page. The columns to the left of the **Default** check box are defined on the Inputs page. The columns to the right of the **Default** check box are defined on the Outputs page.

View Page

Use the View page (WCS_LK_TBL_VIEW) to view the matrix as of the last saved version.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **View**

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

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

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

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

Setting Up Salary Plans, Grades, and Steps

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

This section provides an overview of salary plan setup and discusses how to set up salary plans, grades, and steps.

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

Page Name	Definition Name	Usage
Define Salary Increase Matrix Page	SALARY_MATRIX_TBL	Establish the minimum and maximum percentage increases permitted for each review rating by quartile.

Page Name	Definition Name	Usage
Define Salary Plan Page	SALARY_PLAN_TABLE	Define the common characteristics of your salary plan. German users can use this page to associate a German tariff and tariff area with the salary plan.
Salary Grade Table Page	SALARY_GRADE_TBL1	Specify the minimum, maximum, and midpoint rates for salary grades. Set up several salary grades, in ascending or descending order, within the same salary administration plan. To create different ranges for the same salary grade, use a separate salary administration plan for each.
Categorization Defaults Page	SALARY_GRADE2_TBL	Associate the salary grade with labor agreement categories and subcategories. Before using this page, define labor agreements, categories, and subcategories on the Employee Categorization page.
Salary Step Components Page	SALARY_GRADE_T3GBL	Associate salary components with salary steps within a salary grade. The information that you set up here is used as default compensation data when your workers move into a specific step.
Rate Code Page	WCS_RTCD_DETAILS	View details of the rate code as defined in the Comp Rate Code table.
Grade Advance Criteria Page	SAL_GRD_REV_JPN	Specify grade advance criteria used in the Shohkaku (Grade Advance) candidate process.
Salary Structure Summary Page	SALARY_STRUCTURE	View a summary of the salary structure online or print reports that summarize your grade structure or grade and step structure for each plan. This information is helpful when you plan salary increases.
(USF) Salary Step Table Page	GVT_SAL_GRADE_TBL2	Associate salary components with salary steps within a salary grade. The information you set up here is used as default compensation data when your workers move into a specific step.

Understanding Salary Plan Setup

Before you can use the Base Compensation and Budgeting business process, you need to set up the control tables that support it. You define your salary plans, grades, and steps in a series of control tables. At each level, you define parameters, such as review rating scale and currency, that the system enters as default information at the next level.

Based on how your organization defines its salary structures, complete the following steps to set up your salary plans:

1. (Optional) Set up salary increase matrix guidelines on the Define Salary Increase Matrix Table page.

   Set up this table if you use matrix guidelines in your organization to plan salary increases.

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

2. (Optional) Create a configurable matrix to calculate the budget.

   See Understanding Configurable Matrices.

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

   German users enter tariff information for the salary plan.

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

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

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

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

Related Links
Understanding Updating Salaries for Japan

Define Salary Increase Matrix Page

Use the Define Salary Increase Matrix page (SALARY_MATRIX_TBL) to establish the minimum and maximum percentage increases permitted for each review rating by quartile.

Navigation:

- (Classic) **Compensation** > **Base Compensation** > **Maintain Plans** > **Define Salary Increase Matrix** > **Define Salary Increase Matrix**

- (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Configuration** > **Define Salary Increase Matrix**

This example illustrates the fields and controls on the Define Salary Increase Matrix page.

Rating Scale

Field or Control	Description
Rating Model	Select a rating model to associate with the matrix. Rating models are defined on the Rating Model page. See "Understanding the Content Catalog" (PeopleSoft Human Resources Manage Profiles).

Salary Increase Matrix

Field or Control	Description
Review Rating	Select from the list of ratings in the rating model associated with the rating scale that you selected.
Below Min (below minimum)	Enter the percentage increase of a worker's existing salary. The below minimum range is for those workers whose salaries are below the amount for the first quartile. **Note:** This column is optional because some organizations do not permit salaries that are below the minimum.
1st Quartile to **4th Quartile**	For each quartile, enter the percentage increase of a worker's existing salary.

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

Define Salary Plan Page

Use the Define Salary Plan page (SALARY_PLAN_TABLE) to define the common characteristics of your salary plan.

German users can use this page to associate a German tariff and tariff area with the salary plan.

Navigation:

* **Compensation** > **Base Compensation** > **Maintain Plans** > **Define Salary Plan** > **Define Salary Plan**

* (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Configuration** > **Salary Plan**

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

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

Salary Plan

Field or Control	Description
Standard Hours	Enter the standard hours for this salary plan. The system uses this value (and the value in **Work Period**) in frequency conversions for compensation rate codes that are defined with hourly frequency.
Wage Progression Plan	Select this check box if you want to associate a wage progression plan to this salary administration plan. See "Understanding Wage Progression and Administer Compensation" (PeopleSoft Human Resources Administer Compensation).
Work Period	Enter the work period in which the standard hours should be completed.
Default Salary Matrix Code	If you use salary increase guidelines matrices to plan salary increases, select a code. The system enters this matrix code as the default for each grade in the salary plan. You establish salary matrix codes in the Salary Increase Matrix table. If you have not defined a salary matrix, you can enter this information later.
Default Rating Model	Once you select a default salary matrix code, the system populates the Default Rating Model if you have linked it to the salary matrix code on the Salary Matrix Table. You cannot change it here if it is linked to the salary matrix code unless the system has been installed for Japan.
Company	Select to associate this plan with a particular company in your organization. This value is used in Salary Grade Tables to calculate the compensation rate for rate code type points (Salary Step Components). The Points value is defined by company. You create valid codes on the Comp Rate Code Table page.

Frequency Defaults

Field or Control	Description
Hourly, Daily, and **Monthly**	Select a Frequency ID for each field. The system uses the annualization factor of that Frequency ID when it calculates the daily, monthly, or annual rate for each component of pay that you assign to a salary step on the Salary Step Components page. The system stores the valid values in the Frequency table.

Auto Calculated Premium

Field or Control	Description
Auto Calculated Premium	Select if workers assigned to this salary plan are eligible for a salary premium above the amount calculated by the default component.
Absorbing Premium and **Non-Absorbing Premium**	Select an absorbing premium rate code if the salary premium should absorb an increase in the default salary amount from the component. For example, if a worker has an absorbing premium of 10,000 USD and their default salary increases by 2,000 USD, then the premium would reduce to 8,000 USD. Only rate codes that have the **Default Without Override** option selected are available as options for the absorbing rate code. Select a non-absorbing premium rate code if the salary premium should remain unchanged by an increase in the default salary amount. You can select one or both kinds of rate codes. You can determine how much of the premium each rate code will absorb for each worker on the Job Data - Compensation page.

Attached File

Field or Control	Description
URL Identifier	Enter the URL identifier of the salary planning document you want to attach to this salary plan.
File Name	Displays the file name.

Field or Control	Description
Add	Click to add the file to this salary plan.
Added By and Date Added	Displays who added the file and on what date it was added.

(DEU) Germany

Field or Control	Description
Tariff and Tariff Area	Enter the tariff that is associated with this salary plan and then enter the tariff's area.

(USF) US Federal

Field or Control	Description
Next Scheduled Pay Adjustment	Select the date for the next scheduled adjustment.

(JPN) Japan

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

Salary Grade Table Page

Use the Salary Grade Table page (SALARY_GRADE_TBL1) to specify the minimum, maximum, and midpoint rates for salary grades.

Set up several salary grades, in ascending or descending order, within the same salary administration plan. To create different ranges for the same salary grade, use a separate salary administration plan for each.

Navigation:

• (Classic) **Compensation** > **Base Compensation** > **Maintain Plans** > **Define Salary Grades** > **Salary Grade Table**

- (Classic) **Compensation** > **Base Compensation** > **Maintain Plans** > **Define Salary Grades USF** > **Salary Grade Table**

- (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Configuration** > **Salary Grades**

This example illustrates the fields and controls on the Salary Grade Table page.

Before using this page, set up a salary administration plan on the Define Salary Plan page.

Salary Grade

Field or Control	Description
Additional Description	Enter information that will supplement the salary grade (ID) and description. For example, you might use the field to store an additional internal name for the grade, such as "Associate Managers" to supplement a simple description such as "Grade 4."
Salary Matrix Code	If you selected a default salary matrix code on the Define Salary Plan page, the system enters that code as the default. You can override the default.

Field or Control	Description
Rating Model	If you selected a default salary matrix code on the Salary Plan Table setup page, the system displays the Rating Model that is tied to the salary matrix.
Currency Code	Displays the currency code that you selected for the Salary Administration Plan on the Salary Plan Table setup page. You can change the currency code.
Range Spread	The system calculates the range spread percentage by dividing the salary maximum amount by the minimum amount and then subtracting 1.0.

Salary Ranges

Field or Control	Description
Minimum and Maximum	Enter the minimum and maximum salary in either the **Annual, Monthly, Daily,** or **Hourly** field row. Enter the range in one frequency; the system calculates the minimum and maximum in the other frequencies. (USF) **Bi-Weekly** is also a frequency option.
Midpoint	The system calculates the midpoint as the maximum plus the minimum divided by 2. You can override this default.
Annual, Monthly, Daily, Hourly, and Bi-Weekly	Enter the annual, monthly, daily, hourly, or bi-weekly salary range, depending on how you quote the salary for this grade. If you leave the rows blank, the system calculates the values.

(JPN) Japan

Field or Control	Description
Salary Grade Explanation	Use this field to store information such as capability grade requirements and the corresponding supervisor level.

Categorization Defaults Page

Use the Categorization Defaults page (SALARY_GRADE2_TBL) to associate the salary grade with labor agreement categories and subcategories.

Before using this page, define labor agreements, categories, and subcategories on the Employee Categorization page.

Navigation:

Compensation > **Base Compensation** > **Maintain Plans** > **Define Salary Grades** > **Categorization Defaults**

This example illustrates the fields and controls on the Categorization Defaults page.

Salary Grade Table	Categorization Defaults	Salary Step Components	Grade Advance Criteria

Set ID SHARE   Salary Administration Plan KUH2 Administrative Workers
Salary Grade 4   Standard Hours 40.00   Salary Basis A   Annl Basis

Labor Information (?)   Find | View All   First ◁ 1 of 1 ▷ Last

Effective Date 01/01/1980   Status Active
Description WP Plan KUH2 Grade 4
Regulatory Region [   ] 🔍
Labor Agreement [   ] 🔍
Employee Category [   ] 🔍
Subcategory [   ] 🔍
Subcategory 2 [   ] 🔍

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

Field or Control	*Description*
Regulatory Region	Select a regulatory region from the valid values that you set up on the Regulatory Region page.
Labor Agreement	Select a labor agreement from the valid values that you set up on the Employee Categorization page.
Employee Category, Subcategory, and **Subcategory 2**	Select, as necessary, from the available options.

Salary Step Components Page

Use the Salary Step Components page (SALARY_GRADE_T3GBL) to associate salary components with salary steps within a salary grade.

The information that you set up here is used as default compensation data when your workers move into a specific step.

Navigation:

Compensation > **Base Compensation** > **Maintain Plans** > **Define Salary Grades** > **Salary Step Components**

This example illustrates the fields and controls on the Salary Step Components page.

Salary Grade

Field or Control	Description
Increment Type	If you plan to run a process that automatically moves a worker to the next salary step, select from these values: • *(None):* Select to use no increments or to deselect any values that were entered in error. • *Date Based:* Select to move the worker into the next step based on the worker's entry date into this step. If you select this option, the **Months to Next Step Increment** field becomes visible. • *Either:* Select to use Date Based and Hrs Based at the same time. If you select this option, the **Spec Accum** (special accumulator), **Months to Next Step Increment,** and **Hours to Next Step Increment** fields become visible. • *Hrs Based* (hours based): Select for the worker's step increase to be based on a number of hours. If you select this option, the **Spec Accum** and **Hours to Next Step Increment** fields become visible. • *Manual:* Select to manually enter increments. • *Wks Based* (weeks based): This value is for U.S. federal government users only.

Field or Control	Description
Generate Steps or **Regenerate Steps**	Click this button to calculate or recalculate the salary steps after you have changed the wage progression rules.
Wage Progression Rule	Click this link to access the Salary Plan Table2 page, where you can view wage progression rules associated with this salary grade.
Spec Accum (special accumulator)	If you selected an Increment Type of *Either* or *Hrs Based,* select a special accumulator. The system uses this accumulator to determine worker compensation.

See "Setting Up Special Accumulators" (PeopleSoft Human Resources Manage Base Benefits). |

Salary Step

Field or Control	Description
Step	If you are defining a new step or modifying a step, enter the step number.
Currency	Select a currency code for the step. The system enters the currency code that you entered in the Salary Grade table as the default value. You can change the currency code.

The system displays the compensation totals for the step on this page in the currency that you specify here. |
| **Months to Next Step Increment** | If you select an Increment Type of *Date Based* or *Either,* enter the number of months that the worker must remain in this step before being eligible for the next step increment. |
| **Hours to Next Step Increment** | If you select an Increment Type of *Either* or *Hrs Based,* enter the number of hours that the worker must accumulate in this step before being eligible for the next step increment. |

Salary Components

Field or Control	Description
Rate Code	Select a rate code that you want to associate with this salary step. The valid values in the list are the base pay components that you defined on the Comp Rate Code table page. The system automatically populates certain fields in the grid based on how you defined the rate code in the Compensation Rate Code table.
Seq (sequence)	The system displays *0* as the default Seq number. To avoid duplicate keys for data rows, enter *1* or higher if you associate the same rate code with the same step more than once. Use the same rate code more than once to give the same rate code different compensation rates for the same step. This is useful for job splitting.
Details	Click this button to view details of the selected rate code and rate matrix, if applicable.
Comp Rate (compensation rate)	The system displays the default compensation rate that you defined for the rate code on the Comp Rate Code Table page. If the rate code type is *Flat Amount, Hourly Rate,* or *Hourly Rate + Flat Amount,* enter a compensation rate for the rate code in this salary step. **Note:** This field is unavailable if you are using a rate code that has an associated rate matrix.
Currency	The system enters the default currency code that you defined for the rate code on the Comp Rate Code Table page. You can change the rate code's currency code for this salary step.
Frequency	The system enters the default Frequency ID that you defined for the rate code on the Comp Rate Code Table page. You can override that frequency here.
Percent	If the rate code type for this rate code is *Percent,* enter a percent for the rate code in this salary step.

Field or Control	Description
Rate Code Group	If you selected the **Use Rate Code Groups** check box on the Installation Table - HCM Options page, you can apply the rate code percent to a rate code group. To do so, select a rate code group from the list of valid values. You define rate code groups on the Rate Code Groups page. This field is hidden if you did not select Rate Code Groups in the Installation table.
Points	If the rate code type for this rate code is *Points,* assign points to the rate code for this salary step. Set up the value of each point at the company level on the Company - Default Settings page. This field is hidden if you did not select the **Salary Points** check box on the Installation Table - HCM Options page.

Totals

The system calculates and displays the total value of the pay components that you assigned to the step. When you save the page, the system warns you if the total is outside the minimum or maximum ranges that you specified on the Salary Grade Table page.

Field or Control	Description
Hourly Rate, Daily Rate, Monthly Rate, and **Annual Rate**	The system displays these total values of all the rate codes of the salary step. **Note:** When comparing the hourly rate to the maximum of the step rate, the system does not use rounding. Instead, it uses six decimal places to verify if the hourly rate is less than the maximum rate. Once this check is performed, the system displays the final number for the hourly rate, rounded to two decimal places.

(AUS) Australia

This group box appears only if the **Education & Government** check box on the Installation Table - Country Specific page is selected.

Field or Control	Description
Job Classification	Select the DETYA job classification.

Field or Control	Description
Minimum Classification and **Maximum Classification**	For Australian Public Service, select the minimum and maximum classifications for this salary step.

Grade Advance Criteria Page

Use the Grade Advance Criteria page (SAL_GRD_REV_JPN) to specify grade advance criteria used in the Shohkaku (Grade Advance) candidate process.

Navigation:

Compensation > Base Compensation > Maintain Plans > Define Salary Grades > Grade Advance Criteria

This example illustrates the fields and controls on the Grade Advance Criteria page.

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

Grade Advance Criteria

Field or Control	Description
Minimum Required Years	Enter the number of years workers must be in this grade before they can advance from it. This value is the minimum number of years required in the grade.

Field or Control	Description
Maximum Years	Enter the maximum number of years workers can be in this grade. When checking for workers eligible for advancement from this grade, the system automatically includes those who have been in the grade this number of years, irrespective of all other criteria.
Minimum Age	Enter the minimum age workers must be to be eligible to advance from this grade. **Note:** This criterion refers to workers' education level age, not their actual age.
Number of Reviews	Enter the number of reviews the results of which the system will use to assess a worker's eligibility to advance from this grade. If you enter 3, for example, the system will count the results from the most recent review, the review before that, and the review before that. Only reviews that have the **Include in Grade Advance** check box selected on the Review Definition Table JPN page are included in this process.
Required Eligibility Points	This is the total number of eligibility points a worker must have attained to be eligible to advance from this grade.
Review Weight Total	The system keeps a running count of the weightings you add to the reviews in your **Review Sequence.** The total must be 100 when you have entered all the weightings. The system warns you if the sum of your weightings is not 100.

Field or Control	Description
Review Sequence	Enter a sequence number for the **Number of Reviews** you specified. Sequence number *1* is the most recent review, *2* is the review before that, and *3* is the review before that. The system uses the Review ID (which is a date) to associate the correct review with the correct sequence number and, therefore, the correct weighting.
	Note: If you have more reviews defined as applicable for grade advance than you specify here, it does not matter. If you are only going back two reviews, the system ignores any earlier reviews even if they are defined as applicable for grade advance. You do not have to go back to the Review Definition Table JPN page and deselect the **Include in Grade Advance** check box. If the opposite is true—that is, you specify more reviews here than are defined as applicable for grade advance—the system warns that it was unable to get data when attempting to get review results.
	If you do not want to weight the reviews, and you are using the non-weighted average review method, then enter the **Number of Reviews** and leave the **Review Sequence**(field) and **Review Weight** (next field) blank. The system will divide the review total by the number of reviews used in the calculation.
Review Weight	Unless you are using the non-weighted "simple average" method to determine the number of points, enter the weighting for each review in the sequence.

(USF) Salary Step Table Page

Use the Salary Step Table page (USF) (GVT_SAL_GRADE_TBL2) to associate salary components with salary steps within a salary grade.

The information you set up here is used as default compensation data when your workers move into a specific step.

Navigation:

Compensation > **Base Compensation** > **Maintain Plans** > **Define Salary Grades USF** > **Salary Step Table**

This example illustrates the fields and controls on the Salary Step Table page.

Field or Control	Description
Salary Basis	Displays the salary basis.
Federal Step	The step that is associated with the Federal pay plan.
Biweekly Rate	Displays the total biweekly rate value of all the rate codes of the salary step in the currency of the salary step.
Weeks to Next Step Increment	The number of weeks before the worker is moved into the next step based on the worker's entry date into the current step.
Days to Next Step Increment	The number of days before the worker is moved into the next step based on the worker's entry date into the current step.
WGI Adjustment (within grade increase adjustment)	Define the leave without pay (LWOP) threshold hours. This is the number of consecutive LWOP hours before the within grade increase (WGI) due date is affected. The WGI/Tenure Update process compares threshold hours to the worker's unprocessed nonpay hours to determine if the worker's WGI due date was affected.

See "Processing WGI, Tenure, and Probation Nonpay Hours" (PeopleSoft Payroll for North America). |

Running Salary Grades and Salary Steps Reports

To generate reports for salary grades and salary step reports, use the Salary Grade (RUN_PER706A-), Salary Grade/Step (RUN_PER706B-), Salary Structure (RUN_CMP001), and Salary Grade Table Rpt USF (RUN_FGHR005) components.

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

Pages Used to Run the Salary Grades and Salary Steps Reports

Page Name	Definition Name	Usage
Salary Structure Page	RUNCTL_ASOFDATE	Run the Salary Structure report (CMP001). This report lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and then subtracting 1.0.
Salary Grade Table (XMLP) Page	PRCSRUNCNTL	Run the Salary Grade Table report (PER706A). This report lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.
Salary Grade/Step Page	RUNCTL_PER706B	Run the Salary Grade and Step Tables report (PER706B). This report lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.
Salary Grade Table Rpt USF Page	RUN_FGHR005	(USF) Run the Salary Grade Table USF report. This report prints the contents of the Federal Salary Grade tables in various formats.

Oracle Business Intelligence Publisher (BI Publisher) for PeopleSoft Reports

To offer our customers more robust and complete reporting solutions, Oracle's PeopleSoft development teams are converting existing reports into BI Publisher for PeopleSoft format. Oracle provides a standalone Java-based reporting technology that streamlines report and form generation. BIP uses select features that have been integrated into PeopleTools. BIP for PeopleSoft provides native XMLP technology for PeopleSoft Query and Connected Query, as well as any PeopleSoft application.

BIP separates the data extraction process from the report layout. BIP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, you can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) and in many languages.

See Also *PeopleTools: BI Publisher for PeopleSoft*

Salary Grade/Step Page

Use the Salary Grade/Step page (RUNCTL_PER706B) to run the Salary Grade and Step Tables report (PER706B).

This report lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.

Navigation:

Compensation > **Base Compensation** > **Salary Plan Reports** > **Salary Grade/Step** > **Salary Grade/Step**

This example illustrates the fields and controls on the Salary Grade/Step page.

Field or Control	Description
Show Components	Select if you want your report to display compensation component information.

Setting Up Base Compensation Budgeting and Planning

To set up base compensation budgeting and planning, use the Budget Types (SP_BUD_TYPE_TBL_GBL), Define Budgets (CONTROL_TBL_GBL), Salary Plan Default Values (SAL_PLAN_CONTROL_GBL), and Salary Plan Group Default Values (SAL_PLAN_CNTRL_GRP_GBL) components.

This section provides an overview of salary increase budgeting and planning, and discusses how to set up salary increase budgeting and planning.

Pages Used to Set Up Salary Increase Budgeting and Planning

Page Name	Definition Name	Usage
Budget Types Page	SP_BUD_TYPE_TBL	Define budget types and assign default values for action and reason codes.
Define Budgets Page	CONTROL_TBL	Set up a budget plan that may span multiple budget periods.
Default Budget Parameters Page	SAL_PLAN_CONTROL	Define default budget and salary increase plan control dates, currency defaults, the salary increase method, eligibility dates, and the salary increase effective date.
Assign Group Budget Parameters Page	SAL_PLAN_CNTRL_GRP	Establish default control values for salary increase budgets and plans that you set up for a particular group ID. The system populates this page with the default values you defined on the Default Budget Parameters page. You can change the default values for the group.

Understanding Salary Increase Budgeting and Planning

When you create salary increase budgets and plans, you first need to set up control data that the system uses to determine worker eligibility for salary increases. Set up sets of default control data that you can modify at the group level.

Complete these steps to set up default controls for salary increase budgets and plans:

1. Define budget default IDs on the Define Budgets page.

2. Define plan default control values on the Default Budget Parameters page.

3. Define budget default control values at the group level on the Assign Group Budget Parameters page.

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

Budget Types Page

Use the Budget Types page (SP_BUD_TYPE_TBL) to define budget types and assign default values for action and reason codes.

Navigation:

Set Up HCM > **Product Related** > **Compensation** > **Base Compensation** > **Budget Types** > **Budget Types**

This example illustrates the fields and controls on the Budget Types page.

Field or Control	Description
Effective Date	Enter an effective date for the budget type.
Status	Select *Active* or *Inactive.* Only budget types with a status of *Active* can be used.
Action	Select a value from the Action table.
Reason Code	Select a value from the Action Reason table.

Default Budget Parameters Page

Use the Default Budget Parameters page (SAL_PLAN_CONTROL) to define default budget and salary increase plan control dates, currency defaults, the salary increase method, eligibility dates, and the salary increase effective date.

Navigation:

Set Up HCM > **Product Related** > **Compensation** > **Base Compensation** > **Default Budget Parameters** > **Default Budget Parameters**

This example illustrates the fields and controls on the Default Budget Parameters page.

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

Default Values

Field or Control	Description
Budget Period Start Date and **Budget Period End Date**	Enter the beginning date and ending date of the budget plan's effective period. The system uses the start and end dates that you enter here to verify that the increases you plan take effect between the two dates.
Salary Planning Start Date	Enter the salary planning start date. The system basis its calculations for new increases on the salary planning start date.
Currency Code	Select the currency code that you want the system to enter as the default currency code when you create salary increase plans. The system enters the base currency value in the Primary Permission List Preferences table defined for your user ID as the default value.
Level of Proration	Displays budget and salary plan calculations in the frequency that you select here. The available values are from the Frequency table.

Field or Control	*Description*
Default Rate Type	Select the rate type that you want the system to enter as the default for your salary increase plans. Valid values are the exchange rate types that you previously established in the Rate Type table (RT_TYPE_TBL). The system uses this rate type for all currency conversions.

Salary Increase Method

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

Field or Control	*Description*
All Employees at the Same Time	Select if you want all salary increases under your salary plans to be implemented for all workers at the same time. If you select this option, the **New Hire Eligibility Date** field becomes available for data entry. The effective date of the workers' salary increases will be the effective date that you define for the increase on the Budget Requested page.

Field or Control	Description
Employee Anniversary Date	Select if you want salary increases under your salary plans to be implemented on the worker's anniversary date. The anniversary date can be the worker's hire or rehire date. If you select this option, the **New Hire Eligibility Date** field becomes unavailable for data entry.
	If you select this option, you must:
	• Enter a budget period that spans an entire year (for example, *04/01/2000* to *03/31/2001*), and the effective date of the budget must be the budget period start date.
	• Select *Annual* as the **Level of Proration.**
	• Define only one increase in the budget. The effective date of the budget increase must be the same as the budget period start date. The worker's anniversary date will be the effective date of the increase in the worker's job data row.
	You cannot define multiple increases by effective date and effective sequence if administration is by worker anniversary date.
	• Run the Create/Refresh Anniversary Dates process before loading the increases to Job Data.
	The process should be run before creating the budget. The system calculates the budget based on the list of workers created by this process.

Eligibility Dates

Field or Control	Description
New Hire Eligibility Date	If you selected **All Employees at the Same Time** as the salary increase method, this field becomes available for data entry.
	Enter the cutoff point for workers to be included in the plan. Any workers hired after this date will not appear in the budget or plan. This date must be prior to the salary planning start date.

(MEX) Mexico

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

• **Increment Budget Method** (standard budget raise method)

The standard method allows you to take the budgeted percentage and insert it into the worker's salary plan.

- **Increment Matrix Method** (salary increase matrix method)

The salary increase matrix method allows you to take the percentage from the salary increase matrix.

Once you select the **Increment Matrix Method** option on the Default Budget Parameters page and the Assign Group Budget Parameters page, you need to calculate the salary increase for the worker.

Assign Group Budget Parameters Page

Use the Assign Group Budget Parameters page (SAL_PLAN_CNTRL_GRP) to establish default control values for salary increase budgets and plans that you set up for a particular group ID.

The system populates this page with the default values you defined on the Default Budget Parameters page. You can change the default values for the group.

Navigation:

Set Up HCM > **Product Related** > **Compensation** > **Base Compensation** > **Assign Group Budget Parameters** > **Assign Group Budget Parameters**

This example illustrates the fields and controls on the Assign Group Budget Parameters page.

Note: Even if you do not change any of the default values, you must open this page and save the data before you can create salary increase budgets or plans.

Group Default Values

Field or Control	Description
Budget Default ID	Use this field to select the values you want the system to enter on this page as the default control values for this group. Set up the default values for Budget Default IDs on the Default Budget Parameters page.
Start Date and **End Date**	Displays the start and end dates of the budget period that you entered for this Budget Default ID on the Default Budget Parameters page.

Chapter 4

Administering Salary Plans, Grades, and Steps

Understanding Salary Plans

This section discusses currency defaults and conversion in salary plans.

Set up each salary plan with a unique ID. The series of grades within all salary plans have the same IDs, such as grades 001 to 010. Similarly, the steps that are within grades have the same IDs, such as Steps 1 through 10. Therefore, the salary plans are similar in terms of structure. However, for each plan, you establish different monetary values for the grade ranges and for the different pay components, amounts, percents, and salary points for the salary steps. In this way, you create unique plans with similar structures but with different compensation.

You then establish default compensation packages by tying the unique salary plans to different locations, job codes, military ranks, or individual workers. These defaults ease the administrative burden both at hire and when a worker has a job change. For example, assume that you hire a worker into a particular grade and step at one location, and then transfer the worker to another location. When you enter the location change, the system automatically assigns the salary plan of the new location to the worker if you are storing salary plans in the Location table. The new salary plan brings with it the same grade and step structure, but the compensation is appropriate to the new location.

Currency Defaults and Conversion in Salary Plans

You specify a default currency code at each stage in the process of defining salary plans, grades, and step components. The system enters that currency code as the default at the next stage, which you can change. Define grades and steps in multiple currencies to accommodate the organization's needs.

The system performs compensation frequency conversion in the currency that is specified for the rate code. When the system totals the step components and validates the grade ranges, it converts all compensation rates to the currency of the grade.

The following table summarizes the source of the currency code default and the use of the currency code in calculations:

Salary Plan Level and Page	*Source of Default Currency Code*	*Use in Calculations*
Salary Plan. Salary Plan Table setup page.	The currency code that you select for the organization on the Installation table.	None (for defaults only).

Salary Plan Level and Page	Source of Default Currency Code	Use in Calculations
Salary Grade. Salary Grade Table setup page.	The currency code that you select for the salary plan on the Salary Plan table.	On the Salary Grade Table page, the system displays the salary ranges in the currency of the grade for each frequency.
Salary Step. Salary Step Components setup page.	The currency code that you select for the salary grade on the Salary Grade table.	On the Salary Step Components page, the system displays the total compensation in the currency of the step for each frequency.
Salary Step Component. In the grid on the Salary Step Components setup page.	The currency that you define for the rate code on the Comp Rate Code table.	On the Salary Step Components page, the system displays the compensation rate for the rate code in this currency for each frequency.

Understanding Salary Increase Guidelines

The system ties the data in the Salary Increase Matrix table to salary increase plans and worker Pay Rate Change pages. It determines where a worker falls in the range by calculating salary minus the minimum divided by the spread. For example, a worker with a salary of 26,000 USD in a salary grade range of 25,000 to 30,000 falls into the first quartile because .20 is in the first quartile.

This diagram illustrates the formula used to determine which quartile a worker falls in the salary range.

$$\frac{(26,000 - 25,000)}{5,000} = \frac{1}{5} \text{ or } .20$$

When the system indicates that an amount is out of range, refer to the matrix to see the overall structure of percentage increase guidelines and to make adjustments.

Understanding Salary Grades and Steps

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

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

(JPN) Setting Grade Advance Criteria

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

Weighted and Non-Weighted Sample Results

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

A is the worker's results.

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

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

A: Worker's Review Results

This table shows the worker's review results:

Review	Final Review Band Code	Review Points
Most recent	A	80
Previous	S	100

B1: Weighted Method

This table shows B1 results using the weighted method:

Review	Review Weight
Most recent	60%
Previous	40%

B2: Nonweighted (Simple Average) Method

This table shows B2 results using the nonweighted simple average method:

No. of Reviews	Review Weight
2	NA

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

This table shows C1 results using the weighted method:

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

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

This table shows C2 results using the nonweighted simple average method:

Review	Final Review Band Code	Eligibility Points	Result of Nonweighted Average Review
Most Recent	A	80	(80+100)/2 = 90
Previous	S	100	(80+100)/2 = 90

Administering Compensation with Salary Plan Defaults

This section provides overviews on assigning default salary plans, grades, and steps to a worker, tying salary plans to job codes, locations, or labor agreements, and associating salary plans and grades to military ranks.

To load the data into tables use the LOCATION_TABLE and CI_JOB_CODE_TBL component interfaces.

Assigning Default Salary Plans, Grades, and Steps to a Worker

You specify a worker's salary administration plan, grade, and step on the Job Data - Salary Plan page. When you hire or transfer a worker, the system enters default values in these fields. You can assign default salary plans, grades, and steps to a worker in one or a combination of the following ways:

- Associate the salary plan with a location on the Location Profile page.

- Associate the salary plan with a job code on the Job Code Table - Default Compensation page.

- Associate a salary plan with a labor agreement on the Salary Plan Grades page.

- Assign a salary plan directly to a worker on the Job Data - Salary Plan page.

- Associate a salary plan with a military rank in the Military Service table, Grades Associated with Ranks page.

Whether you tie salary plans to locations, job codes, rank, or a combination of these, the system ultimately enters default compensation information on the worker's compensation record, where you can change it. The system verifies that any combinations of salary administration plans and grades that you select are valid and exist in the system. If the combination does not exist, the system issues a warning message.

Note: If you want the system to automatically enter step component rates in the job data, select Multi-Step Grade on the Installation Table - HCM Options page.

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

The system uses the salary grade and step from the Job Code table. It uses the salary plan ID to determine the compensation data that is associated with the grade and step. The salary plan ID can be tied to the job code, location, or labor agreement.

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

If location differences don't matter, enter a salary plan ID only in the Job Code table. When you select a job code for a worker in the Job Data pages, the system enters the salary plan from the Job Code table.

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

Related Links
Setting Up Salary Plans, Grades, and Steps

Associating Salary Plans and Grades to Military Ranks

Military organizations use the salary plan and grade tables to set up the general salary plans and grades that fit the pay attributes of specific rank codes. Once these salary structures are created, users must access the Military Service table to create ranks and associate salary plans and grades to each rank.

See "Setting Up Military Rank Structure" (PeopleSoft Human Resources Administer Workforce).

Administering Salary Increases

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

This section provides overviews of salary increase administration and entering salary changes manually, lists common elements, and discusses how to run the automated step increase process.

Pages Used to Run the Automated Step Increase Process

Page Name	Definition Name	Usage
Automated Step Increment Page	RUNCTL_CMP007	Automatically move workers to the next salary step when they complete the required time in the current step.
(EG) Automated Step Increment EG Page	RUNCTL_CMP107	Automatically move workers to the next salary step when they complete the required time in the current step.

Understanding Salary Increase Administration

You administer salary changes in one of the following ways:

- Manually enter salary changes in the Job Data component or the Pay Rate Change component.

- (CAN, USA) Implement automated step increases by using the Automated Step Increase process.

- Tie salary increases to the worker's performance review.

- Create salary increase budgets and plans and load the mass increases to the job records.

- Process mass salary changes across the organization based on percent, pay group, or job code.

Related Links
Base Compensation and Budgeting
Understanding Salary Updating

Entering Salary Changes in the Job Data Pages Manually

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

If you enter salary ranges on the Salary Grade Table page, then when you enter a compensation rate on the Compensation page in the Job Data or Pay Rate Change components, the system compares the new compensation rate against the values in the salary ranges. The system issues a warning message for amounts that are over or under the guidelines. You can still enter an out-of-range rate after you acknowledge the message. If you do not permit any out-of-range salaries in the organization, then the system changes the warning to an error message so that no out-of-range salaries can be entered.

Related Links
Define Salary Plan Page
"Understanding the Process of Updating Person and Job Information" (PeopleSoft Human Resources Administer Workforce)

Common Elements Used in This Section

Field or Control	*Description*
Salary Administration Plan	Select the plan for which you are running the automated step increase.
Start Date and **End Date**	Enter the start and end dates of the period for which you want to process salary increases. Only workers who are in the specified salary plan within this time period are eligible for a step progression.
Job Effective Date	If this salary plan has an hourly-based step progression, enter the job effective date. If this salary plan has a date-based step progression, the job effective date is the previous step entry date plus the number of months that are required for the next step increase.
Review Rating	Enter the minimum criteria for workers if the rating scale that you select is an average scale type.

Entering Salary Increases by Using the Automated Step Increase Process

If you enter *Date Based, Hours Based,* or *Either* in the **Increment Type** field on the Salary Step Components setup page, you can use the Automated Step Increase process (CMP107) to automatically move qualified workers to the next step. The system automatically inserts a new job data row for workers who meet the data in the **Hours** or **Months to Next Step Increment** fields. On the Automated Step Increase process run control page, you set minimum review conditions that a worker must meet before moving to the next step.

You follow a three-step procedure to run the Automated Step Increase process. All three steps are available in PeopleSoft Process Scheduler when you use the Automated Step Increase process run control page.

Note: When you run the Automated Step Increase process with an increment type of *Hours Based* or *Either,* you must have installed PeopleSoft Payroll for North America. The Automated Step Increase process retrieves the number of hours that you work from one of the following PeopleSoft Payroll for North America tables: US Earnings Balance or Canadian Earnings Balance.
You do not need to have PeopleSoft Payroll for North America installed to run the Automated Step Increase process with an increment type of *Date Based.*

To run the Automated Step Increase process:

1. (Optional) Run the Late Reviews process to notify supervisors about worker reviews that are late. This process selects all workers whose last review effective date is on or before the date that the process runs and whose next review date is before the date that the process runs or no next review date is assigned. If you have workflow enabled, this process creates a worklist entry for all managers whose workers have not yet received a review.

2. Run the process (CMP007) by using PeopleSoft Application Engine to find the workers who are receiving a step increase, and load this information to a temporary table.

3. Run the Automated Step Increase report to review all the data that is created by running PeopleSoft Application Engine.

4. Run the process (HR_SP_CI) by using Application Engine to load all the worker data to the Job Data pages.

Automated Step Increment Page

Use the Automated Step Increment page (RUNCTL_CMP007) to automatically move workers to the next salary step when they complete the required time in the current step.

Navigation:

*   (Classic)**Compensation** > **Base Compensation** > **Maintain Plans** > **Automated Step Increment** > **Automated Step Increment**

*   (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Configuration** > **Automated Step Increment**

This example illustrates the fields and controls on the Automated Step Increment page.

Field or Control	Description
Action and **Reason**	Enter the action and reason for the workers who are receiving a step increase.
Update Future Rows	When you select this option, the process updates all existing future effective-dated rows (rows that have an effective date that is later than the **End Date**) in addition to the effective-dated rows it is adding.
Don't Absorb Changes	Select to ensure that the salary premium of the processed workers does not absorb any salary changes even if the salary plan has an associated absorbing rate code. This option only applies to workers who have a target compensation rate and are assigned to a salary plan with the automatically calculated premium function enabled. See Define Salary Plan Page.
From Date and **End Date**	Enter the date range that you want to process.
Job Effective Date	If you use PeopleSoft Payroll for North America, enter the effective date of the new job. Otherwise, the system calculates this date as: (actual step entry date) + (months to next step increment).

Process By

Field or Control	Description
Group ID	Select to process by group ID. The **Group ID** field becomes available for you to select the group ID of the worker group that you want to process.
Sal Admin Plan (salary administration plan)	Select to process by salary administration plan. The **Business Unit** and **Sal Plan** fields become available for you to select the salary plan that you want to process.

Performance Document Criteria

Field or Control	Description
Review Required	Select this check box if a performance review is required.

Field or Control	Description
Doc Type (document type)	Select a value for the performance review.
Rating Model	Select a value. These values come from the Rating Model table.
Review Rating	Select a value. These values come from the Rating Model table.
Review Points	Enter the number of points associated with the performance review.

(EG) Automated Step Increment EG Page

Use the Automated Step Increment EG page (RUNCTL_CMP107) to automatically move workers to the next salary step when they complete the required time in the current step.

Navigation:

Compensation > **Base Compensation** > **Maintain Plans** > **Automated Step Increment EG** > **Automated Step Increment EG**

This example illustrates the fields and controls on the Automated Step Increment EG page.

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

Processing Options

Field or Control	Description
Report Only	Select if you want a report of the step increases for this plan and grade within the time periods, but you do not want to process the increases at this time.
Report & Process Increases	Select if you want to process the increases and produce a report.

Audit Indicators

Select the indicators that you want to include in audit information:

- Audit Indicators

- Step Entry Date

- Compensation Rate

- Change Amount

- Hourly Rate

- Monthly Rate

- Annual Rate

- Change Percentage

Based on your selections, the report records the items you selected for the employees and period for which you are processing salary increases. Audits identify errors that would occur when you trying to move workers to the next salary step when they complete the required time in the current step. If you review the report and notice any errors, make the appropriate corrections before you process an employee's step increase.

Exclusions

Field or Control	Description
Doc Type (document type)	Select a value for the performance review.
Rating Model	Select a value. These values come from the Rating Model table.
Review Rating	Select a value. These values come from the Rating Model table.

Viewing Worker Salary Structure Information

This section discusses how to:

- View compa-ratios.

- View range calculations.

Viewing Compa-Ratios

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

The system calculates the ratio by comparing the worker salary to the midpoint amount of the salary grade. If the worker's current rate is the same as the midpoint, then the compa-ratio is 1.00, or 100 percent, of the midpoint. If the rate is above or below the midpoint, the system calculates a ratio for the difference between the salary and the midpoint, and then it adds or subtracts the difference from 1.00.

Viewing Range Calculations

Use the percent-in-range calculation to see where workers' salaries fall within the range that is set up for their salary grades. Both this calculation and the compa-ratio appear in the Pay Rate Change - Compensation page for each worker. The range percent indicates where the worker's salary falls within the worker's salary grade range. The system calculates the range percent as follows:

This image illustrates the formula used by the system to calculate range percentage if the worker falls below the minimum range.

$$\text{Range } \% = \left(\frac{\text{EE Salary - Min of Range}}{\text{EE Salary}} \right) \times 100$$

If the worker falls above the maximum range, then the system uses this formula:

This image illustrates the formula used by the system to calculate range percentage if the worker falls above the maximum range.

$$\text{Range \%} = \left(\frac{\left(\text{EE Salary - Max of Range} \right) \times 100}{\text{Max}} \right) \times 100$$

If the worker falls in the range, then the system uses this formula:

This image illustrates the formula used by the system to calculate range percentage if the worker falls in the range.

$$\text{Range \%} = \left(\frac{\text{EE Salary - Min of Range}}{\text{Max - Min}} \right) \times 100$$

Reporting Worker Salary Structure Information

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

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

After assigning salary plans, grades, and steps to locations, job codes, or workers, you can run the following reports to view lists and comparisons of the data: Job Grading by Evaluation Points, Compa-Ratio Analysis by Grade, Below Minimum Analysis, Above Maximum Analysis, and Departmental Salaries report.

Pages Used to Run Worker Salary Structure Reports

Page Name	Definition Name	Usage
Job Grading by Evaluation Pts. Page (Job Grading by Evaluation Points Page)	RUNCTL_ASOFDATE	Generate the Job Grading by Evaluation Points report (CMP002). This report lists each salary grade in the organization, with salary data for all the titles within that grade that were ordered by the job evaluation point assignment. The report includes all titles within that grade that were ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in the organization and, consequently, a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.
Ratio Analysis Page	RUNCTL_ASOFDATE	Generate the Compa-Ratio Analysis report (CMP003). The report lists each worker in the salary grade and the midpoint amount of the salaries that are in that grade. For each worker, the report lists job code, title, name, and department ID. The report displays those workers whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*
Below Minimum Analysis Page	RUNCTL_ASOFDATE	Generate the Below Minimum Analysis report (CMP004). This report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose worker status is active, leave of absence, suspended, or leave with pay.
Above Maximum Analysis Page	RUNCTL_ASOFDATE	Generate the Above Maximum Analysis report (CMP005). For each worker, the report shows the job code and title, name, department ID, the maximum amount, the worker's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those workers whose worker status is active, leave of absence, suspended, or leave with pay.

Page Name	Definition Name	Usage
Salary History by Department Page	PRCSRUNCNTL_LC_HR	Run the Departmental Salaries report (PER012). This report provides an alphabetical list of workers by department, basic job data information, and a breakdown of pay rates for each.
(JPN) Grade Advance Candidates JPN Page	RUNCTL_PER062_JPN	Run the Grade Advance Candidate List report (PER062JP) to list workers who are eligible to advance from the grade that you enter. The Grade Advance Candidate List Report is the output from the RUNCTL_PER062_JPN process. It lists all workers who are candidates for a grade advance because they meet the appropriate criteria. The criteria for eligibility for advancement is defined at grade level. The criteria include the results of worker reviews.

(JPN) Grade Advance Candidates JPN Page

Use the Grade Advance Candidates JPN page (RUNCTL_PER062_JPN) to run the Grade Advance Candidate List report (PER062JP) to list workers who are eligible to advance from the grade that you enter.

The Grade Advance Candidate List Report is the output from the RUNCTL_PER062_JPN process. It lists all workers who are candidates for a grade advance because they meet the appropriate criteria. The criteria for eligibility for advancement is defined at grade level. The criteria include the results of worker reviews.

Navigation:

Compensation > **Base Compensation** > **Salary Plan Reports** > **Grade Advance Candidates JPN** > **Grade Advance Candidates JPN**

This example illustrates the fields and controls on the Grade Advance Candidates JPN page.

Candidate Selection Conditions

Field or Control	Description
Set ID	Enter the setID. This value is necessary because salary plans can be used in multiple sets.
Sal Plan (salary plan)	Enter the salary plan of the grade for which you want the candidate list.
Grade	Enter the grade on which you want the eligibility report.
Nbr of Reviews (number of reviews)	Displays the number of reviews that you specify for inclusion in the eligibility points count. This information comes from the Grade Advance Criteria page.
Required Yrs in Current Grade (required years in current grade)	Displays the number of years that workers must be in this grade before they become eligible to advance from this grade. This information comes from the Grade Advance Criteria page.

Field or Control	Description
Min Age (minimum age)	Displays the minimum age that workers must reach before they can advance from this grade. This information comes from the Grade Advance Criteria page. The system uses the worker's education level age when determining this minimum age.
Required Eligibility Points	Even though you already defined the required eligibility points for a grade advance in the Grade Advance Criteria page, you have the flexibility to adjust this points criteria for actual reporting. For example, you may want to see how many more or how many fewer workers become eligible to advance from this grade if you reduce or increase the required points, respectively.
Max Yrs in Current Grade (maximum years in current grade)	Displays the maximum years in the current grade that you set on the Grade Advance Criteria page. The system automatically lists as eligible all workers who reach the maximum years for the grade, irrespective of all other criteria.

Applicable Reviews

Field or Control	Description
Review ID	Displays the review IDs and descriptions of all the reviews that are included in the eligibility points count. The number of review IDs will equal the number that you specified in the **Number of Reviews** field on the Grade Advance Criteria page. The system selects the reviews based on their IDs, which are also their effective dates. For two reviews, it selects the most recent effective date or review ID and the next most recent effective date or review ID.
Doc Type (document type)	Displays the review type from the Review Definition page.
Review Weight	Displays the review weight that you entered on the Grade Advance Criteria page. If you use the non-weighted or simple average method and do not add any review sequences or weightings, then these fields will be blank. The system will total the review points and divide by the number of reviews from which those points came.

Chapter 5

Using Configurable Matrices

Understanding Configurable Matrices

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

Video: Defining a Configurable Matrix

Examples of Configurable Matrices

The examples that follow illustrate the concept of matrices and their intended uses.

Simple Rate Matrix

Use this matrix to determine the compensation rate for a worker based on his department.

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

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

Matrix with Two Inputs and One Output

This matrix has two inputs and one output:

Time with Company (months) - Input	Site Risk - Input	Rate (USD per hour) - Output
0–24	Low	10.00

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

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

Market Pay Matrix: Matrix with Multiple Outputs of Different Types

The outputs of a matrix can be of different types, and the following example is a matrix with multiple outputs, one of which is a percentage. You use this matrix to track the compensation rates for a job at various percentiles and different geographical areas. It also tracks rates for standard compensation figures, such as total cash compensation.

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

Geo-graphy	Currency	Base 25th	Base 50th	Base 75th	Base 100th	Base Market Reference	Variable Target Percent	Mean Total Compen-sation	Total Compen-sation Reference
NORTH-EST REGION	USD	26,000	27,00	27,500	28,000	27,000	12.00	29,000	30,000
MID ATLAN-TIC REGION	USD	24,000	25,000	25,500	26,000	25,000	10.00	27,000	28,000
SOUTH-WEST REGION	USD	27,000	28,000	28,500	29,000	28,000	11.00	30,000	31,000

Matrix with Calculated Results

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

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

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

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

Understanding Matrix Inputs and Outputs

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

Matrix Inputs

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

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

See Defining Sources for Configurable Matrices.

Matrix Outputs

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

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

See Predefined Result IDs.

Matrix Evaluation Rules

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

Using Wildcards as Search Keys

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

Understanding Matrix Types

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

- Market pay matrix

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

- Rate matrix

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

- Salary increase matrix

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

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

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

See "Comp Rate Code Table Page" (PeopleSoft Human Resources Administer Compensation).

See Understanding the Base Compensation Budgeting and Planning Business Process.

Related Links
"Understanding Market Pay" (Application Fundamentals)

Understanding Matrix Displays

This section discusses how the system displays a configurable matrix.

Matrix Display

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

Example: Displaying Inputs as Columns

Assume that you have two inputs (step and department) and one output (rate). The system can display the matrix in two ways.

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

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

Example 2: One input is a column header.

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

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

Defining Sources for Configurable Matrices

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

Note: You cannot create new source types.

This section provides an overview of source types, lists common elements, and discusses how to define and maintain sources for configurable matrices.

Pages Used to Define and Maintain Sources for Configurable Matrices

Page Name	Definition Name	Usage
Source Definition Page (ADDRESS Source Type)	WCS_SO_ADDRESS	Define sources that are base on address information.
Source Definition Page (DATES Source Type)	WCS_SO_DATES	Define sources that are based on dates.
Source Definition Page (EMPINFO Source Type)	WCS_SO_EMPL	Define sources that are based on employee information.
Source Definition Page (EMPRELATED Source Type)	WCS_SO_RELATED	Define sources that are based on related employee information.
Source Definition Page (GEOGRAPHY Source Type)	WCS_SO_GEOGRAPHY	Define sources that are based on geographical areas.
Source Definition Page (MATRIX Source Type)	WCS_SO_OTHER_LKUP	Define sources that are based on a matrix.
Source Definition Page (POSINFO Source Type)	WCS_SO_EMPL	Define sources that are based on position information.
Source Definition Page (POSRELATED Source Type)	WCS_SO_RELATED	Define sources that are based on related position information.
Source Definition Page (RATING Source Type)	WCS_SO_PERFORM	Define sources that are based on performance ratings.
Source Definition Page (RATIOS Source Type)	WCS_SO_RATIO	Define sources that are based on ratios.
Source Definition Page (STEPRATE Source Type)	WCS_SO_STEP_RATE	Define sources that are based on salary grade step rates.
Source Definition Page (SUPPLIED Source Type)	WCS_SO_SUPPLIED	Define sources that are based on supplied information.
Source Definition Page (TIMESPAN Source Type)	WCS_SO_TIME	Define sources that are based on the length of time.

Related Links

Predefined Source IDs

Understanding Source Types

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

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

Common Elements Used in this Section

Field or Control	Description
Effective Date	The effective date of the source ID definition.
Description	Description of the source ID.
Source ID	The unique name for the input to be used in the configurable matrix.
Source Type	The type of data to which the source refers. These are system-delivered. You cannot create additional source types.
Status	Select *Active* or *Inactive*. **Important!** Sources must have a status of *Active* to be used to build configurable matrices.
Comment	Add any relevant comments for this source.
Default Label	Enter the name for the source that will appear as row or column header when the matrix is displayed.
Element	Select the element from the available list of values, usually a field from a table. This will become the source of search keys for the matrix.
Data Type	This value is automatically set to *System Data* or *Customer Data.* System-defined source definitions will be set to *System Data.* You should not modify these definitions. When you create new source IDs, the data type will be set to *Customer Data.*

Source Definition Page (ADDRESS Source Type)

Use the Source Definition page (ADDRESS Source Type) (WCS_SO_ADDRESS) to define sources that are base on address information.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *ADDRESS* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - ADDRESS source type.

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

Field or Control	Description
Address Type	Select the type of address.
Element	Select the field that will define this source.

Source Definition Page (DATES Source Type)

Use the Source Definition page (DATES Source Type) (WCS_SO_DATES) to define sources that are based on dates.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *DATES* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - DATES source type.

Field or Control	Description
Type of Date	Select the date type for this matrix. Values are: • *Date of Last Increase*: The date of the last increase, which is the Comp Rate on the worker's COMPENSATION record. • *Date of Last Var Comp Award*: The date of last award paid out using the Variable Compensation functionality. • *Hire Date*: The hire date on the EMPLOYMENT view, which is specific to Empl Record number. • *Seniority Date*: The company seniority date on the EMPLOYMENT view. • *Start of Current Grade*: The grade entry date on the worker's JOB record. • *Start of Current Job*: The job entry date on the worker's JOB record. • *Start of Current Position*: The position entry date on the worker's JOB record. • *Start of Current Step*: The step entry date on the worker's JOB record. • *Termination Date*: The termination date on the EMPLOYMENT view.

Source Definition Page (EMPINFO Source Type)

Use the Source Definition page (EMPINFO Source Type) (WCS_SO_EMPL) to define sources that are based on employee information.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *EMPINFO* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - EMPINFO source type.

Field or Control	Description
Context	Select a value. The system will allow you to select an element that is available through one of these contexts. This is the list of contexts, along with sample list of elements that are available within each context: • *Effective Dated Personal Data*: Full-time student, Highest Education Level. • *Employee Time Profile*: Time Period ID, Rule Element, Time Reporter Status. • *General Employment Data*: Date Last Worked, 5% Owner, Probation Date. • *Job History*: Company, Business Unit, Labor Agreement, Salary Plan, Grade. • *Job Jr*: Assignment ID, Category Rate, Intercompany Transfer Data. • *Names*: First Name, Last Name, Middle Name, Prefix. • *Person Core Objects*: Birth data. • *Person Org Assignments*: Benefit Record, Organizational Instance.
Element	Select the field that will define this source. The prompt list is based on the selected context.

Source Definition Page (EMPRELATED Source Type)

Use the Source Definition page (EMPRELATED Source Type) (WCS_SO_RELATED) to define sources that are based on related employee information.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *EMPRELATED* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - EMPRELATED source type (1 of 2).

This example illustrates the fields and controls on the Source Definition page - EMPRELATED source type (2 of 2).

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

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

Source Definition Page (GEOGRAPHY Source Type)

Use the Source Definition page (GEOGRAPHY Source Type) (WCS_SO_GEOGRAPHY) to define sources that are based on geographical areas.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *GEOGRAPHY* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - GEOGRAPHY source type.

This source type is used to create sources that will always refer to Geographical Area definitions. One system-defined Source ID, *GEOGAREA* exists; however, you can create another source if you want a different name and label.

Note: Key values are not automatically validated for geographical areas. However, you can specify the prompt table GEOGRAPHY_TBL and prompt field GEOGRAPHY_ID when you add GEOGAREA as the input in the matrix component.

Source Definition Page (MATRIX Source Type)

Use the Source Definition page (MATRIX Source Type) (WCS_SO_OTHER_LKUP) to define sources that are based on a matrix.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *MATRIX* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - MATRIX source type.

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

See <u>Inputs Page</u>.

Field or Control	Description
Matrix ID	Select from the list of available matrices.
Matrix Result ID	Select the result ID (output) from the matrix that will be used as the source ID.

Example: Health Benefits Rates Using a MATRIX Type Source ID

Suppose you are creating a matrix to determine health benefit allowance amounts. However, you want to base the health benefits on standard hourly rates for each department. If the hourly rates are below a certain amounts, then you will give health benefits. The matrix may look like this example:

Standard Hourly Rate	Health Benefit Rate
10–12	4
13–15	3
16–20	2
21–100	0

In this case, you need a way to dynamically get hourly rates for the worker's department. A source of type Matrix is useful in this case. In the previous example, you define a source that will return the rate for the worker's department. You specify which matrix has department rates and which result ID from that matrix is the rate value.

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

Source Definition Page (POSINFO Source Type)

Use the Source Definition page (POSINFO Source Type) (WCS_SO_EMPL) to define sources that are based on position information.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *POSINFO* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - POSINFO source type.

Field or Control	Description
Element	Select the field that will define this source.

Source Definition Page (POSRELATED Source Type)

Use the Source Definition page (POSRELATED Source Type) (WCS_SO_RELATED) to define sources that are based on related position information.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *POSRELATED* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - POSRELATED source type.

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

Field or Control	Description
Position Data	Click the folder icon in the tree to open the appropriate related table and then select the appropriate element by clicking the leaf node. This tree allows you to derive a value from any table related to the position of the worker using the position number as a starting point. For example, if you want to use the Grade of the worker as the source, you can link to it by opening the Salary Grade folder and clicking the Grade leaf node.

Source Definition Page (RATING Source Type)

Use the Source Definition page (RATING Source Type) (WCS_SO_PERFORM) to define sources that are based on performance ratings.

Navigation:

Set Up HCM > Common Definitions > Configurable Matrices > Define Matrix Sources > Source Definition

Select *RATING* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - RATING source type.

Field or Control	Description
Document Type	Select a performance review document type from the available values. The list of document types will change based on the effective date of the Source ID.
Element	Select the element that will define this source. The available values come from the EP_APPR record.

Source Definition Page (RATIOS Source Type)

Use the Source Definition page (RATIOS Source Type) (WCS_SO_RATIO) to define sources that are based on ratios.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *RATIOS* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - RATIOS source type.

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

Field or Control	Description
Ratio Type	Select one of these values: • *Compa Ratio* • *Job Ratio* • *Percent in Range*

Source Definition Page (STEPRATE Source Type)

Use the Source Definition page (STEPRATE Source Type) (WCS_SO_STEP_RATE) to define sources that are based on salary grade step rates.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *STEPRATE* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - STEPRATE source type.

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

Field or Control	Description
Salary Grade	Enter the grade (from the worker's salary plan) to which this source will refer.
Step	Enter the step within that grade whose rate you want to use as the source.
Frequency	Select the frequency with which you want the rate returned from these values: *Annual, Daily, Hourly,* or *Monthly.*

Source Definition Page (SUPPLIED Source Type)

Use the Source Definition page (SUPPLIED Source Type) (WCS_SO_SUPPLIED) to define sources that are based on supplied information.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *SUPPLIED* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - SUPPLIED source type.

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

Field or Control	Description
Type of Data	Select from these values: • *Character* • *Date* • *Number*

Source Definition Page (TIMESPAN Source Type)

Use the Source Definition page (TIMESPAN Source Type) (WCS_SO_TIME) to define sources that are based on the length of time.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Sources** > **Source Definition**

Select *TIMESPAN* as the source type on the Define Sources search page.

This example illustrates the fields and controls on the Source Definition page - TIMESPAN source type.

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

Field or Control	Description
Calculate From	Select the type of date from which you want the length of time to be calculated. The available dates are: • *Date of Last Increase* • *Date of Last Var Comp Award* • *Hire Date* • *Seniority Date* • *Specific Date* • *Start in Current Grade* • *Start in Current Job* • *Start in Current Position* • *Start in Current Step* • *Termination Date*

Field or Control	Description
Specified Date	Enter the specific calendar date from which you want the length of time to be calculated. **Important!** The **Specified Date** and **Calculate From** options are mutually exclusive. If you enter a specified date, you cannot select a date in the **Calculated From** field. If you select a date in the **Calculated From** field, you cannot enter a specified date.
Frequency	Select the frequency with which you want the length of time to be calculated. You can select *Hours, Days, Weeks,* or *Months.*

Rounding Rules	Select a value that will represent the type of rounding to be applied to the timespan.
	
	• *Anniversary:* This type of rounding will use anniversary date or time to round up or down. The calculations are performed as follows:
	
	    • Hours and Days: This option does not apply. The system simply returns hours or days based on actual timespan.
	
	    • Weeks and Months: This option will always round down to the nearest *whole* unit. For example, 4 weeks and 6 days will be rounded to 4 weeks, and 8 months and 29 days will be rounded to 8 months.
	
	• *Threshold:* This type of rounding offers more granular control on rounding. The calculations are performed as follows:
	
	    • Hours and Days: No rounding.
	
	    • Weeks and Months: Rounding depends on the threshold.
	
	    If the number of days in the threshold is less than or equal to the remainder from the calculated timespan, the system adds one more unit. For example, assume that the frequency was set to Weeks and the threshold was set to 5 days. If the timespan was calculated as 4 weeks and 5 days, the system would return 4 + 1 = 5 weeks as the final value. However, if the threshold was 6 days, the system would return 4 weeks.
	
	    For a frequency of Months, if the timespan was 2 months and 15 days and the threshold was set to 20 days, the system returns 2 months. If the threshold was 15 days or less, the system would return 3 months.

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

Defining Results for Configurable Matrices

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

This section provides an overview of results for configurable matrices, lists common elements, and discusses how to define and maintain results for configurable matrices.

Pages Used to Define and Maintain Results for Configurable Matrices

Page Name	Definition Name	Usage
Result Definition Page (SIMPLECHAR Result Type)	WCS_RES_SIMPLECHR	Maintain results returned from configurable matrices using the SIMPLECHAR result type.
Result Definition Page (SIMPLENUM Result Type)	WCS_RES_SIMPLENUM	Maintain results returned from configurable matrices using the SIMPLENUM result type.
Result Definition Page (SIMPLEDATE Result Type)	WCS_RES_SIMPLEDTE	Maintain results returned from configurable matrices using the SIMPLEDATE result type.
Result Definition Page (INCRBYAMT Result Type)	WCS_RES_INCR_BASE	Maintain results returned from configurable matrices using the INCRBYAMT result type.
Result Definition Page (PCNTOFBASE Result Type)	WCS_RES_PCT_BASE	Maintain results returned from configurable matrices using the PCNTOFBASE result type.
Result Definition Page (THRESHOLD Result Type)	WCS_RES_THRESHOLD	Maintain results returned from configurable matrices using the THRESHOLD result type.
Result Definition Page (SOURCE Result Type)	WCS_RES_SOURCE	Maintain results returned from configurable matrices using the SOURCE result type.
Result Definition Page (MATRIX Result Type)	WCS_RES_OTHER_LKUP	Maintain results returned from configurable matrices using the MATRIX result type.

Understanding Results for Configurable Matrices

Results (result IDs) represent outputs for configurable matrices. A result ID is simply a standardized name for one of the outputs from a matrix. By using standardized names, the applications and components that

query a matrix can know what set and type of results to expect after they perform a lookup. For example, if you expect to get a percentage value back, the name PERCENTAGE is more intuitive than NUMBER1. If you expect to get an amount that represents a compensation rate, the name COMPRATE is better than AMOUNT.

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

Advanced result types also exist. For these, the system performs a formula-based calculation or a lookup operation and returns the final value as the result.

See Predefined Result IDs.

The four special result types are:

- INCRBYAMT (increment by amount)

  See Result Definition Page (INCRBYAMT Result Type).

- PCNTOFBASE (percent of base)

  See Result Definition Page (PCNTOFBASE Result Type).

- THRESHOLD

  See Result Definition Page (THRESHOLD Result Type).

- SOURCE

  See Result Definition Page (INCRBYAMT Result Type).

Common Elements Used in this Section

Field or Control	Description
Status	Select *Active* or *Inactive.* **Important!** Results must have a status of *Active* to be used to build configurable matrices.
Comment	Add relevant comments about the result.
Default Label	Enter the name for the result.

Field or Control	Description
Result Usage	Select one or more values to indicate which type of matrices will use this result: • *Market Pay Surveys* • *Rate Tables* • *Salary Increase Matrix*

Result Definition Page (SIMPLECHAR Result Type)

Use the Result Definition page (SIMPLECHAR Result Type) (WCS_RES_SIMPLECHR) to maintain results returned from configurable matrices using the SIMPLECHAR result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *SIMPLECHAR* (simple character) as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - SIMPLECHAR result type.

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

Field or Control	Description
Length	Enter the maximum number of characters allowed to store the value.

Result Definition Page (SIMPLENUM Result Type)

Use the Result Definition page (SIMPLENUM Result Type) (WCS_RES_SIMPLENUM) to maintain results returned from configurable matrices using the SIMPLENUM result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *SIMPLENUM* (simple number) as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - SIMPLENUM result type.

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

Result Definition Page (SIMPLEDATE Result Type)

Use the Result Definition page (SIMPLEDATE Result Type) (WCS_RES_SIMPLEDTE) to maintain results returned from configurable matrices using the SIMPLEDATE result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *SIMPLEDATE* (simple date) as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - SIMPLEDATE result type.

This result type stores date values in the matrix. For example, you can use it to track the date of the surveys that are tracked in market pay matrices.

Result Definition Page (INCRBYAMT Result Type)

Use the Result Definition page (INCRBYAMT Result Type) (WCS_RES_INCR_BASE) to maintain results returned from configurable matrices using the INCRBYAMT result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *INCRBYAMT* (increment by amount) as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - INCRBYAMT result type.

Field or Control	Description
Total Length	Enter the number of characters for the result ID.
Decimal Positions	Indicate how many decimal places to use for the number format.

Using the Increment by Amount Result Type

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

The matrix looks like this:

Department (Source)	Base Rate (Result)	Final Rate (Result)
1010	10	−2
1020	10	−1
1030	12	−1

Department (Source)	Base Rate (Result)	Final Rate (Result)
1040	12	1

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

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

Result Definition Page (PCNTOFBASE Result Type)

Use the Result Definition page (PCNTOFBASE Result Type) (WCS_RES_PCT_BASE) to maintain results returned from configurable matrices using the PCNTOFBASE result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *PCNTOFBASE* (percent of base) as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - PCNTOFBASE result type.

Field or Control	Description
Total Length	Enter the total length of the number format.

Field or Control	Description
Decimals	Enter the number of decimal places to use for the number format.

Example: PCNTOFBASE (percent of base) Result Type

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

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

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

Using this example, if a worker is in Dept 1010, the system returns $10 \times 85\% = 8.50$ as the value of the Final Rate result ID.

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

If a worker is in Dept 1040, the value of the Final Rate result ID is $12 \times 110\% = 13.20$.

Result Definition Page (THRESHOLD Result Type)

Use the Result Definition page (THRESHOLD Result Type) (WCS_RES_THRESHOLD) to maintain results returned from configurable matrices using the THRESHOLD result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *THRESHOLD* as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - THRESHOLD result type.

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

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

Result Definition Page (SOURCE Result Type)

Use the Result Definition page (SOURCE Result Type) (WCS_RES_SOURCE) to maintain results returned from configurable matrices using the SOURCE result type.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Matrix Results** > **Result Definition**

Select *SOURCE* as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - SOURCE result type.

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

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

The matrix looks like this:

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

Since you do not know each worker's annual rates, you define one result ID of type of SOURCE, called ANNUAL_RATE_SOURCE, and associate it to the Source ID ANNUAL_RATE. Then, you define a second result ID of type PCNTOFBASE, called BONUS_PCT, which tracks the bonus percentages. You

specify the ANNUAL_RATE_SOURCE result ID as the target result ID to which the bonus percentage is applied. When this matrix is evaluated, the following actions will occur:

1. Since Dept is the required input, the system looks up the worker's department (for example, 103).

2. The system looks up results for Dept 103.

3. For the Annual_Rate_Source result, the system looks up the ANNUAL RATE of the worker and returns that value (for example, 10,000 USD).

4. For the Bonus Pct result, the system applies the bonus percent, 5, to 10,000 USD and returns a value of 500 USD.

Result Definition Page (MATRIX Result Type)

Use the Result Definition page (MATRIX Result Type) (WCS_RES_OTHER_LKUP) to maintain results returned from configurable matrices using the MATRIX result type.

Navigation:

Set Up HCM > Common Definitions > Configurable Matrices > Define Matrix Results > Result Definition

Select *MATRIX* as the result type on the Define Results search page.

This example illustrates the fields and controls on the Result Definition page - MATRIX result type.

Field or Control	Description
Matrix ID	Select the matrix on which this result should be based.

Field or Control	Description
Matrix Result ID	Select a result ID (for the matrix) on which this result should be based.

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

In this case, the **Matrix ID** is *KUR001,* and the **Matrix Result ID** is *NEW_AMOUNT.*

Defining and Maintaining Configurable Matrices

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

This section lists common elements and discusses how to define and maintain configurable matrices.

Pages Used to Define and Maintain Configurable Matrices

Page Name	Definition Name	Usage
Matrix Definition Page	WCS_LK_TBL_DEFN	Define and maintain matrices.
Inputs Page	WCS_LK_TBL_INPUTS	Define inputs to the configurable matrix.
Outputs Page	WCS_LK_TBL_OUTPUTS	Define outputs of the matrix.
Search Keys Page	WCS_LK_TBL_KEYS	Specify the search keys to be used to match worker data.
Load Configurable Matrix Keys Page	WCS_LK_TBL_KEY_SEC	Automatically load search keys for specific sources using a prompt table.
Data Content Page	WCS_LK_TBL_DATA	Enter values for the output data.
View Page	WCS_LK_TBL_VIEW	View the matrix as of the last saved version.

Common Elements Used in this Section

Field or Control	Description
Description	Enter a description for the matrix.
Status	Select *Active* or *Inactive*.
	Important! Matrices must have a status of *Active* to be used in any business process.
Comment	Add relevant comments for this matrix.
Default Label	Enter the label.

Matrix Definition Page

Use the Matrix Definition page (WCS_LK_TBL_DEFN) to define and maintain matrices.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Matrix Definition**

This example illustrates the fields and controls on the Matrix Definition page.

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

Field or Control	Description
Matrix Type	Select the matrix type on which the configurable matrix should be based. Values are: • *MARKETPAY* (market pay surveys). • *RATE* (rate tables). • *SALMATRIX* (salary increase matrices).

Field or Control	Description
Orientation	The orientation indicates the starting point for associating the employee ID to other related fields. If all sources used in the matrix can be evaluated using EMPLOYEE and JOB records only, then you only need the EMPLOYEE orientation. If sources can be evaluated starting from worker's Position information, then you can add POSITION as another orientation. **Note:** You must have at least one orientation. You can, however, have both orientations. If the information available to the calling program is only position data and not the employee ID, then you need POSITION as an orientation to allow the matrix to evaluate the sources.

Related Links

"Understanding Market Pay" (Application Fundamentals)

"Setting Up Rate Codes" (PeopleSoft Human Resources Administer Compensation)

Understanding the Base Compensation Budgeting and Planning Business Process

Inputs Page

Use the Inputs page (WCS_LK_TBL_INPUTS) to define inputs to the configurable matrix.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Inputs**

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

Matrix Inputs

Field or Control	Description
Order	Enter the numerical value to indicate the order in which the inputs should appear in the configurable matrix. This value will also determine the order in which the inputs are evaluated against the worker data.
Label	Enter the label that will appear.
Key Type	Select a value: • *Match:* The system will check for an exact match, if available. • *Range:* The system will check against a range of values, if available.
Decimals	Enter the number of decimal positions to maintain for numeric inputs. This field will be grayed out as applicable.

Field or Control	Description
Display As	Select whether this input should appear as a *Row* or a *Column* header.
	Important! Only one input can be selected as a column header. However, you can choose to have all inputs appear as rows.

Optional Prompting

If you want the ability to enter search keys from a prompt table, you can use this section to specify the table, the field, and, if appropriate, the setID.

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

Sources for Resolving Input

Field or Control	Description
Source ID	Select one or more sources that can be used to derive the matrix inputs. For example, if you are defining an input for JOBCODE, you should select the JOBCODE source ID. Every input is defined using at least one source; therefore, you must select at least one source.
	Note: You can leave the label for the input blank, and upon selecting the source, the system will populate the label field with the default label for that source.

Range Rules

Field or Control	Description
Range Lookup Method	Select the method that dictates which breakpoint (range) the system should consider as a match. Values are: • *Use Higher Limit:* The system retrieves the matrix data for the breakpoint higher than the input value. • *Use Lower Limit:* The system retrieves the matrix data for the breakpoint lower than the input value. • *Use Nearest Limit:* The system retrieves the matrix data for the breakpoint closest to the input value.

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

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

Analyzing the Lookup Methods

Assuming a worker has a value of 45 percent:

- If the method is *Use Higher Limit,* the system determines that 60 is the first breakpoint higher than 45, and it will use 60.

- If the method is *Use Lower Limit,* the system determines that 40 is the first breakpoint lower than 45, and it will use 40.

- If the method is *Use Nearest Limit,* the system determines that 45 is closest to 40, and it will use 40. (If the worker's percent-in-range had been 55, the system would have used 60.)

When Outside Range

Field or Control	Description
Use First Limit if Under	Use this option if you want the system to consider the first breakpoint a match for all values lower than the first breakpoint. For example, if the worker had a percent-in-range of 20, the system would use 40 if this option were selected. If this option is deselected, the system will not find any matches for the input.
Use Last Limit if Over	Use this option if you want the system to consider the last breakpoint a match for all values higher than the last breakpoint. For example, if the worker had a percent–in–range of 120, the system would use 100 if this option were selected. If this option is deselected, the system will not find any matches for the input.

Special Processing

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

Example Interpolating Result IDs

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

Note: All values are percentages, unless noted otherwise.

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

If you assume that the worker is on Step 1 and the Percent-in-Range (PIR) is 50, then the rate could be 40 or 30. However, if the **Interpolate Result IDs** option is selected, then the system would calculate the ratio of worker's value (50) to the lower limit (40), and use that ratio on the lower rate (40) and return a rate of 35. The worker's PIR of 50 is exactly between the breakpoints 40 and 60; therefore, the system calculates a rate exactly between the rates of 40 and 30.

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

Outputs Page

Use the Outputs page (WCS_LK_TBL_OUTPUTS) to define outputs of the matrix.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Outputs**

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

Note: Results that are available on this page will differ depending upon the matrix type.

Matrix Outputs (Result Columns)

Field or Control	Description
Order	Enter a numerical value that indicates the order in which the outputs should appear in the matrix.
Result ID	Select a value that the configurable matrix should return as an output. These values come from the Results ID table.
Label	Enter the label that will appear in the matrix.
Type of Data	This display-only field indicates if the result ID has a character, number, or date format.
Decimals	If the result ID has a number format, then you can enter the number of decimal places that you want to appear in the matrix.
Do not return Results	Select this check box if the result is to be used as a reference only for a calculation in another result. For example, if you have a PCNTOFBASE type result that uses BASERATE as its reference, then you can set this check box on the BASERATE result ID. The calling program will only receive PCNTOFBASE as an output result ID; it will not receive any other output from the matrix. **Note:** You will see all defined result IDs on matrix displays, even though this check box may be selected for some results.
Valid Values	Select a table, a field, and, if appropriate, a setID to use to designate a list of values for an output column. The system uses the record and field designations as an edit table for the output values.

Search Keys Page

Use the Search Keys page (WCS_LK_TBL_KEYS) to specify the search keys to be used to match worker data.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Search Keys**

This example illustrates the fields and controls on the Search Keys page.

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

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

See "Understanding Market Pay" (Application Fundamentals).

Matrix Definition

Field or Control	Description
Enter Keys for	Select the input for which you will enter search keys. These values come from the Inputs page. You must enter at least one search key for each input (except for market pay matrices). In the previous example, after you entered keys for performance ratings, you would switch to *Percent-In-Range* and enter keys for that input.
Select Values From Prompt Table	If you defined the Table and Field in the **Optional Prompting** group box for the selected input, you can click this link to access the Load Configurable Matrix Keys search page, which lists the values from that table. This link is not available if the input has a key type of Range.

Search Key Series

Field or Control	Description
Search Key (Character)	Enter a value, which will be the key value against which worker data is matched. For example, you would enter rows with key values 1, 2, 3, 4 for the input *Performance Rating*. You would enter key values 40, 60, 80, and 100 for the input *Percent-in-Range*.
Order	Enter a numeric value that indicates the order in which the search keys will appear in the matrix. This field only applies to keys of type Character. Numeric and Date values have an implicit order and do not use this field for display order.
WildCard	Select if the system should use the search key as a wildcard. That is, if the worker's data did not match any other key, then the system will use this row as a match. For example, assume that four departments are listed in the matrix as keys 101, 102, 103, and 104. If you wanted all workers in all other departments to be handled separately, then you would enter a fifth key for Dept and make it a wildcard. You can set a wildcard only if the key type is set to Match. Wildcards do not apply for key type of Range.
Generate Key Combinations	After you have completed entering keys for all inputs, click this button to generate the key combinations for the configurable matrix. The system automatically takes you to the Data Content page, where you can enter values for each result ID for different input combinations.

Example: Generating Key Combinations

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

Dept	Risk	Rate
101	Low	0
101	Med	0
101	High	0

Dept	*Risk*	*Rate*
102	Low	0
102	Med	0
102	High	0
103	Low	0
103	Med	0
103	High	0
104	Low	0
104	Med	0
104	High	0

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

Load Configurable Matrix Keys Page

Use the Load Configurable Matrix Keys page (WCS_LK_TBL_KEY_SEC) to automatically load search keys for specific sources using a prompt table.

Navigation:

Click the **Select Values from Prompt Table** link on the Search Keys page.

This example illustrates the fields and controls on the Load Configurable Matrix Keys page.

To load values from a specific prompt table:

1. Select a value in the **Prompt Table** field.

2. Select a value in the **Prompt Field** field.

3. Click the **Search** button.

4. In the **Select Key Values To Load** grid, select the check boxes for the values you want to load.

5. Click OK.

Data Content Page

Use the Data Content page (WCS_LK_TBL_DATA) to enter values for the output data.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **Data Content**

This example illustrates the fields and controls on the Data Content page.

Matrix Definition	Inputs	Outputs	Search Keys	**Data Content**	View

Matrix Name KUS001

Matrix Definition   First ◀ 1 of 1 ▶ Last

Effective Date 01/01/2000   **Status** Active

Description Pos In Range Salary Increase

Matrix Type Salary Increase Matrix

Matrix Data   Personalize | Find | View All | ⬈   First ◀ 1-16 of 16 ▶ Last

Perf Rating	Pos in Range	Default	Min Percent	Default Percent	Max Percentage		
1	40.00	☐	6.00	6.50	7.00	➕	➖
1	60.00	☐	5.00	6.00	7.00	➕	➖
1	80.00	☐	4.00	5.00	6.00	➕	➖
1	100.00	☐	3.00	4.00	5.00	➕	➖
2	40.00	☐	5.00	5.50	6.00	➕	➖
2	60.00	☐	4.00	5.00	6.00	➕	➖
2	80.00	☐	3.00	4.00	5.00	➕	➖
2	100.00	☐	2.00	3.00	4.00	➕	➖
3	40.00	☑	4.00	5.00	5.00	➕	➖
3	60.00	☐	3.00	4.00	5.00	➕	➖
3	80.00	☐	2.00	3.00	4.00	➕	➖
3	100.00	☐	1.00	2.00	3.00	➕	➖
4	40.00	☐	0.00	0.00	1.00	➕	➖
4	60.00	☐	0.00	0.00	0.00	➕	➖
4	80.00	☐	0.00	0.00	0.00	➕	➖

This page lists the combinations of search keys for all inputs that the matrix will evaluate. For each combination, it lists all outputs fields. You can add the character, date, or numerical values of each output here. The columns that appear on this page vary depending on the fields you define on the Inputs page and Outputs page. The columns to the left of the **Default** check box are defined on the Inputs page. The columns to the right of the **Default** check box are defined on the Outputs page.

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

Field or Control	Description
Default	(Optional) Select the row that you want to use as default results if the system does not find a match between the worker data and any combination of input rows. In the previous example, you were able to choose a default for a worker who was above or below the 40 and 100 ranges or who did not have a performance rating. A good practice is to select a default for a rate matrix that is attached to a rate code that is associated with a salary step. **Important!** You can only select one row as a Default.

View Page

Use the View page (WCS_LK_TBL_VIEW) to view the matrix as of the last saved version.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Define Configurable Matrices** > **View**

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

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

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

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

Using Special Rules to Create Configurable Matrices

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

Rate Matrix

This table lists the result IDs that must exist in a rate matrix that you plan to associate with a rate code. The list of expected result IDs is based on the rate code type:

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

Rate Code Type	Result ID
Flat Rate	• NEW_AMOUNT • PERCENT_TO_APPLY
Hourly Rate + Flat Amount	• NEW_AMOUNT • PERCENT_TO_APPLY
Hourly Rate	• NEW_AMOUNT • PERCENT_TO_APPLY • INCREMENT_AMOUNT • THRESHOLD
Percent	INCREMENT_PERCENT
Points	NEW_POINTS

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

Salary Increase Matrix Attached to a Group Budget

The result IDs in the matrix must match the rate code type. This table illustrates the result IDs that are allowed based on rate code type:

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

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

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

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

Perf Ra-ting	0				50				100				1000			
	Min Pct	Dflt Pct	Max Pct	Lump Sum	Min Pct	Dflt Pct	Max Pct	Lump Sum	Min Pct	Dflt Pct	Max Pct	Lump Sum	Min Pct	Dflt Pct	Max Pct	Lump Sum
1	0.00	0.00	0.00	20.00	6.00	6.50	7.00	0.00	5.00	5.50	7.00	0.00	0.00	0.00	0.00	6.00

Perf Rating	0				50				100				1000			
2	0.00	0.00	0.00	18.00	5.00	5.50	6.00	0.00	4.00	5.00	6.00	0.00	0.00	0.00	0.00	4.00
3	0.00	0.00	0.00	16.00	4.50	5.00	5.50	0.00	4.50	4.50	5.00	0.00	0.00	0.00	0.00	2.00
4	0.00	0.00	0.00	6.00	3.00	3.50	4.00	0.00	3.00	3.50	4.00	0.00	0.00	0.00	0.00	0.00

Note that the matrix includes an explicit breakpoint with a Percent in Range (PIR) value of 0. This breakpoint is required to handle all workers whose PIR is negative, as compared to their salary range. A breakpoint with a value of 1000 also exists. This breakpoint is required to handle all workers whose PIR is greater than 100. The value 1000 is an arbitrarily high value chosen to ensure that all possible PIR values greater than 100 are captured.

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

Copying Matrices

This section discusses how to copy configurable matrices.

Page Used to Copy Configurable Matrices

Page Name	Definition Name	Usage
Copy Configurable Matrix Page	WCS_LK_TBL_CLONE	Copy matrices.

Copy Configurable Matrix Page

Use the Copy Configurable Matrix page (WCS_LK_TBL_CLONE) to copy matrices.

Navigation:

Set Up HCM > **Common Definitions** > **Configurable Matrices** > **Copy Configurable Matrix** > **Copy Configurable Matrix**

This example illustrates the fields and controls on the Copy Configurable Matrix page.

To copy a matrix:

1. Select the matrix that you want to copy from the **Available Matrices** grid.

2. In the **Copy To** group box, enter values in the **Matrix Name, Effective Date, Status,** and **Description** fields for the new matrix.

    Note: The default status is *Inactive,* but you can change it to *Active.* However, if the source matrix is *Inactive,* then you cannot change the copy status to *Active.*

3. In the **Matrix Components To Copy** group box:

    •   Select **Copy Structure Only** to include just matrix details, input and output definitions.

    •   Select **Copy Structure and Keys** to include the structure plus all search key values for every input.

- Select **Copy Structure, Keys, and Data** to clone the entire matrix.

4. Click the **Copy Matrix** button to create the copy.

   You will get a confirmation message and then see a new link labeled "Edit New Matrix <<matrix name>>". Click this link to begin editing the new matrix.

Chapter 6

Budgeting and Planning Salary Increases

Understanding the Base Compensation Budgeting and Planning Business Process

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

To calculate base compensation budgets:

1. Create a group using group build pages.

    See "Understanding Group Build" (Application Fundamentals).

2. Set up base compensation and budgeting control tables.

3. Create a budget in the Create/Approve Budget component and select the budget type or action reason.

4. Load rate codes and select one of these methods for calculation:

    *   Matrix

    *   Amount

    *   Percent

    *   Points

    *   Percent of Points

    *   Add Percent

5. Calculate the new budget and view the results.

6. (Optional) Compare proposed budgets and make adjustments.

7. (Optional) Request approval from approving manager via workflow.

8. Approve a budget or go directly to the Assign Group Increases component without approving the budget first.

9. Establish a salary increase plan for workers in the group based on the budget.

10. Manually adjust increases for individual workers in the group.

11. Compare salary plan figures with budget figures.

12. Finalize and approve the salary increase plan.

13. Populate worker records with planned, approved increases.

Related Links
Assign Group Budget Parameters Page

Common Elements Used to Work With Base Compensation and Budgeting

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

Calculating Base Compensation Budgets

This section provides overviews of Base Compensation budgeting procedures and budget setup and configuration for group salary increases, lists common elements, and discusses how to budget group increases.

Pages Used to Budget Group Increases

Page Name	Definition Name	Usage
Create/Approve Group Budget - Budget Description Page	GROUP_INCR_BUDGET1	Assign a Budget ID and describe a salary increase budget for a group of workers.
Create/Approve Group Budget - Budget Requested Page	GROUP_INCR_BUDGET2	Define the action and action reason for the budget and to view requested and current budget totals. Use this page to submit a budget for approval, to modify and approve the budget, and to approve the salary plan associated with the budget.

Page Name	Definition Name	Usage
Create/Approve Group Budget - Budget Components Page	GROUP_INCR_BUDGET3	Enter and calculate increases for group members by base pay rate codes. The system calculates the totals for the group and displays them on the Create/Approve Group Budget - Budget Requested page.
Create/Approve Group Budget - More Budget Details Page	GROUP_INCR_BUDGET6	View specific budget amounts based on groups and action and reasons combinations.

Add more budget fields and create user-defined fields to store additional budget data. |
| Calculate Group Budget Page | RUNCTL_CALCBUDGET | Run the Budget Calculation application engine process, which calculates the total budget amount and percent for the rate code increases that you enter on the Create/Approve Group Budget - Budget Components page.

It enters the totals in the Requested and Current data rows on the Create/Approve Group Budget - Budget Requested page.

You can calculate the budget using online processing if the group is small. For large groups, use this application engine process.

Define a group increase budget before using this page. |

Understanding Base Compensation Budgeting Procedures

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

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

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

• If you create more than one budget for the same group and budget period, you can compare budgets during the approval process or skip the budget comparison steps.

• You can approve a budget on either the Create/Approve Group Budget - Budget Requested page or the Compare Group Budgets - Comparison page.

Complete these steps to establish a salary increase budget for a group:

1. Create a group using the group build pages.

See "Understanding Group Build" (Application Fundamentals).

2. Set up salary plan control values for the group.

3. Assign a budget ID and describe the budget on the Create/Approve Group Budget - Budget Description page.

   You can approve only one budget for a single group and budget period start date.

4. Define the effective date, sequence, action, and action reason for the budget increase on the Create/Approve Group Budget - Budget Requested page.

   You can budget for different action or action reason combinations that take effect on different dates within the same budget. However, do not do this if the increases are administered by Anniversary Date.

5. Load rate codes to view all the rate codes for the group on the Create/Approve Group Budget - Budget Components page.

6. Enter salary increases by selecting a matrix or by entering an amount, a percent, and so on for each rate code, as needed, on the Create/Approve Group Budget - Budget Components page. You must save the page if you want to run the calculations that comprise the next step.

7. Calculate the requested and current budget amounts by clicking the **Calculate** button on either the Create/Approve Group Budget - Budget Components page or the Create/Approve Group Budget - Budget Requested page, or by running the Budget Calculations Application Engine process.

   If your group is large, you will want to use the application engine process.

   The system enters the calculated totals of the requested budget in the Requested and Current rows on the Create/Approve Group Budget - Budget Requested page.

8. If you are not using the requested budget functionality, do not click the **Request Approval** button.

   (Optional) Access the Create/Approve Group Budget - More Budget Details page and select the **Total Current Annual Salaries, Approved Budget,** and **Allocation Amount** check boxes. Click the **Get Selected Values** button to view the calculated budget values. You may also use the new additional fields for reserve amount, vacant position budget amount, and new position budget amount. Six user-defined fields are also provided.

9. If you are requesting a budget for approval, submit the budget for approval by clicking the **Request Approval** button on the Create/Approve Group Budget - Budget Requested page.

10. Compare budgets (if you created more than one budget for the same group and budget start date) on the Compare Group Budgets pages.

11. Approve the budget without modification by selecting the **Budget Approved** check box on the Compare Group Budgets - Comparison page.

12. Modify the current budget, approve it, or use it for salary planning without approving it.

    To modify the budget, change the values in the **Current Budget** grid on the Create/Approve Group Budget - Budget Components page.

13. To approve the budget, enter dates, select the **Approve the Budget** check box, and then save.

14. Use the approved or unapproved budget as the basis for creating a salary increase plan.

Understanding Budget Setup and Configuration for Group Salary Increases

This diagram illustrates the process flow required to set up group budgets for group salary increases.
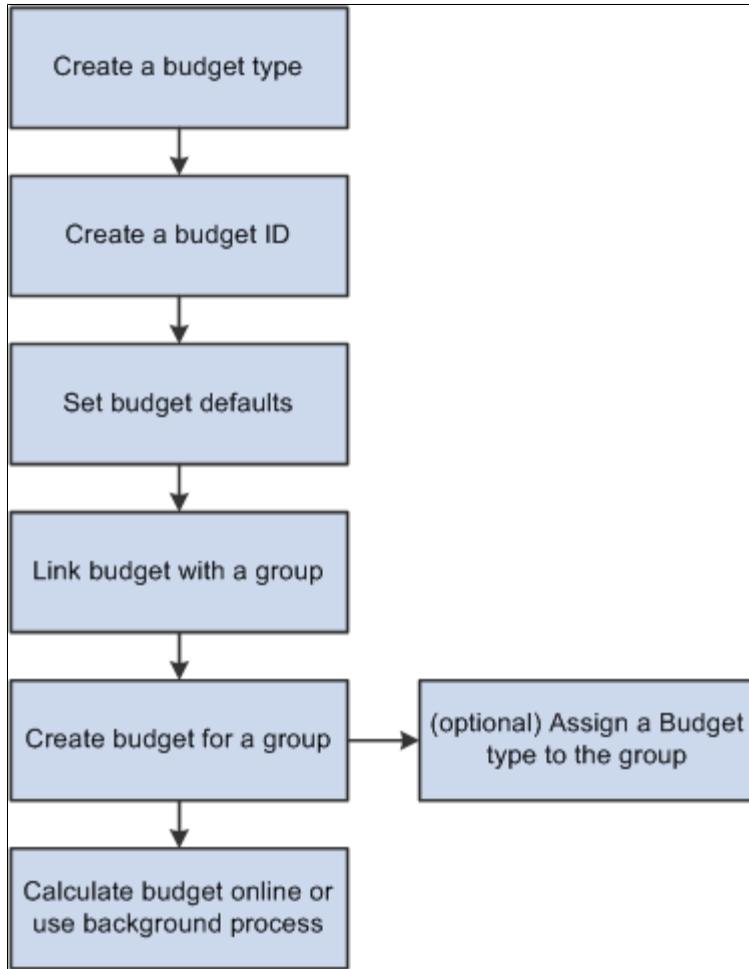
Common Elements Used in This Section

Field or Control	Description
Budget Period and **Level of Proration**	Displays the control dates and the level of proration that you set up for the group in the Default Budget Parameters page.
Total Count	Displays the total count of workers in the group as of the salary plan start date.
Total FTE (full-time equivalent)	Displays the total number of FTEs for the group as of the salary plan start date.

Field or Control	Description
Total Annual Salaries and **Total Current Annual Salaries**	The total sums of salaries for workers who meet the following criteria: • They are in the group as of the salary plan start date. • Their worker status is Active, Leave of Absence, Leave with Pay, or Suspended. • They are eligible for an increase as of the salary plan start date. • If you are using the All Employees at the Same Time increase method, the worker's hire date is before the New Hire Eligibility date that you defined on the Default Budget Parameters page.

Create/Approve Group Budget - Budget Description Page

Use the Create/Approve Group Budget - Budget Description page (GROUP_INCR_BUDGET1) to assign a Budget ID and describe a salary increase budget for a group of workers.

Navigation:

Compensation > **Base Compensation** > **Group Budgets** > **Create/Approve Group Budget** > **Create/Approve Group Budget - Budget Description**

This example illustrates the fields and controls on the Create/Approve Group Budget - Budget Description page.

You can set up a number of different budgets with distinct budget IDs for the same group in the same budget period. You can compare these budgets in the Compare Group Budgets pages.

Set up the group default values on the Default Budget Parameters page.

Budget

Field or Control	Description
Get Group	Click to retrieve or refresh the total count, FTE, and total annual salaries information for this group ID.

Group Default Values

Field or Control	Description
Salary Planning Start Date	Displays the Salary Planning Start Date that you set up for the group in the Assign Group Budget Parameters page.
New Hire Eligibility Date	If you are administering salaries by the All Employees at the Same Time method, displays the new hire eligibility date that you set up for the group in the Assign Group Budget Parameters page.

Create/Approve Group Budget - Budget Requested Page

Use the Create/Approve Group Budget - Budget Requested page (GROUP_INCR_BUDGET2) to define the action and action reason for the budget and to view requested and current budget totals.

Navigation:

Compensation > **Base Compensation** > **Group Budgets** > **Create/Approve Group Budget** > **Create/Approve Group Budget - Budget Requested**

This example illustrates the fields and controls on the Create/Approve Group Budget - Budget Requested page.

Use this page to submit a budget for approval, to modify and approve the budget, and to approve the salary plan associated with the budget.

Field or Control	Description
Calculate	After you enter or change rate codes and increase values in the **Requested Budget** or **Current Budget** grid on the Create/Approve Group Budget - Budget Components page, click **Calculate** to calculate the budget and populate the **Current, Requested, Planned Increase and Variance Percent,** and **Amount** fields on this page. The system calculates the total for the group based on the following data: • Increases in workers' compensation rate codes that you enter in the Create/Approve Group Budget - Budget Components page. • Budget period parameters that you define for the budget. **Note:** Only the budget manager is allowed to cancel a budget approval. If you modify a budget that was already approved, you will have to recalculate the budget and then request a new approval. You cannot save the page unless a recalculation is done and a new approval is requested. You cannot modify a budget that has salary increases already loaded to JOB since a modification would change the status in Summarize and Approve Raises to *Processed.* If a budget is modified, the status will automatically be set to *Proposed,* even if the status was previously *Approved.*

Field or Control	Description
Effective Date	Select an effective date for the action and action reason associated with this budget. This is the effective date which will ultimately be loaded into Job Data. The effective date enables you to budget for different action and action reason combinations that take effect on different dates within the same budget. By using the **Seq** (sequence number), **Effective Date, Action,** and **Reason** fields, you can perform multiple actions on the same rate code for the same effective date and different action reasons. **Note:** If you administer salary increases by Employee Anniversary Date under the plan, you can only define one increase in the budget, which must have the salary plan start date as the effective date.

Field or Control	Description
Sequence	If you enter an additional action with the same effective date and different action reason, increase the sequence number by one integer. The system assumes the first action to have a sequence number of *0;* therefore, enter a sequence number of *1* for your second use of the an action code and action reason for the same effective date. You may have the same effective dates for pay rate changes for merit and promotions, and other types, using specific effective sequences.
Request Approval	(Optional) Click this button to send a workflow notifying the approval manager to review the budget. Workflow must be enabled.
Budget Type	Select a budget type from the available values. The values come from the Define Budgets page. The default value for this field appears.
Action	Select from these values associated with this budget: *Demotion, Pay Rt Chg* (pay rate change), *Posn, Chg* (position change), and *Promotion.* The default value for this field appears.
Reason	Select from the list of action reason code values established in the Action Reason Code table.
Budget Manager	The default value is the Manager ID defined for the group when the group was defined. You can override this ID if necessary. When you enter the manager ID, the system automatically updates the **Rcd#** (record number) field with the manager's worker record number.
Record	The system enters the worker record number of the budget manager you identified.

Field or Control	Description

Percent	Displays the total percent change in salaries.
	
	`Requested Percent = Requested Amount - T⇒`
	`otal Annual Salaries prorated to the lev⇒`
	`el of proration / Total Annual Salaries ⇒`
	`prorated to the level of proration x 100`
	
	`Current Percent = Current Amount - Total⇒`
	` Annual Salaries prorated to the level o⇒`
	`f proration / Total Annual Salaries pror⇒`
	`ated to the level of proration x 100`
	
	`Planned Increase Percent = Planned Incre⇒`
	`ase Amount / Total Annual Salaries prora⇒`
	`ted to the level of proration x 100`
	
	`Variance Percent = Variance Amount / Tot⇒`
	`al Annual Salaries prorated to the level⇒`
	` of proration x 100`
	
	Note: Before doing this subtraction and division, **Requested Amount** and **Current Amount** values (prorated to level of proration) must be converted to an annual amount.

Amount	Displays the change in total salaries. These calculations include all base pay rate codes in each Job compensation package as well as any new percentage or salary points calculations resulting from the planned increase.
	
	`Requested Amount = Sum of requested sala⇒`
	`ries prorated to the level of proration`
	
	`Current Amount = Sum of current salaries⇒`
	` prorated to the level of proration`
	
	`Planned Increase Amount = Current Amount⇒`
	` - Total Annual Salaries prorated to the⇒`
	` level of proration`
	
	`Variance Amount = Current Amount - Reque⇒`
	`sted Amount`

Field or Control	Description
Date	Enter the date that you are requesting this budget (in the Requested row) or approving the budget (in the Current row) or approving the salary plan (in the Planned Increases row). The system enters this date if you approve the budget on the Compare Group Budgets - Comparison page.
Requested	This information represents the amount being requested for salary increases.
Current	This information represents the budget as revised by the approver on the Create/Approve Group Budget - Budget Components page. This amount is available for distribution to group members on the Propose Raises page.
Planned Increases	This information represents the total increases that you define in the salary increase plan associated with this budget. All amounts appear in the budget currency and frequency.
Budget Approved	The approval manager first enters the date in the Current budget row and then selects the **Budget Approved** check box when satisfied with all of the budget figures. The system selects this check box if you approve a budget on the Compare Group Budgets - Comparison page. Only one approved budget can exist at one time for a single group and budget period start date. Only the budget manager can cancel a budget approval by deselecting this check box. Then, the **Requested Budget** and **Current Budget** grids on the Create/Approve Group Budget - Budget Components page will become available for edit.
Grand Totals	The total amount requested for the budget.
Amt (amount)	The system enters the total increases according to the current budget, calculated and displayed at the level of proration defined for the budget.
% (percent)	The system enters the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the current budget.

Field or Control	Description
Variance	After you create a salary increase plan associated with this budget, displays the variance between the Requested Amount and Current Amount. If the variance displays as a positive amount, the salary plan exceeds the budgeted amount. If the variance displays as a negative amount, the planned salaries fall short of the budgeted amount.
Salary Plan Approved	The approval manager selects this check box to approve the plan. It must be selected to load the salary increases to Job Data.

Related Links

Understanding Salary Increase Budgeting and Planning

Create/Approve Group Budget - Budget Components Page

Use the Create/Approve Group Budget - Budget Components page (GROUP_INCR_BUDGET3) to enter and calculate increases for group members by base pay rate codes.

The system calculates the totals for the group and displays them on the Create/Approve Group Budget - Budget Requested page.

Navigation:

Compensation > **Base Compensation** > **Group Budgets** > **Create/Approve Group Budget** > **Create/Approve Group Budget - Budget Components**

This example illustrates the fields and controls on the Create/Approve Group Budget - Budget Components page: Amounts tab (1 of 2).

Budget Description	Budget Requested	Budget Components	More Budget Details

Group ID KU002   KU002

Budget Start 01/01/2001   **End Date** 12/31/2001

Budget ID KU002-B1   **Level of Proration** A   Annual   [Calculate]

Budget   Find | View All   First 1 of 1 Last

Effective Date 01/01/2001   **Sequence** 0

Budget Type

Action PAY   Pay Rt Chg   **Reason** MER Merit

Budget Manager   **Record** 0

[Load Rate Codes]

Requested Budget

| Amounts | Changes | |

Rate Code	Description	Total Increase	Currency	Frequency		
KUGRCH		12.00	USD	H	+	−
KUGRCM		400.00	USD	M	+	−
KUGRCP		20.00	USD	M	+	−
NAHRLY	Default NA	7.50	USD	H	+	−

Current Budget

| Amounts | Changes | |

Rate Code	Description	Total Increase	Currency	Frequency		
KUGRCH		12.00	USD	H	+	−
KUGRCM		400.00	USD	M	+	−
KUGRCP		20.00	USD	M	+	−
NAHRLY	Default NA	7.50	USD	H	+	−

This example illustrates the fields and controls on the Create/Approve Group Budget - Budget Components page: Changes tab (2 of 2).

Field or Control	Description
Calculate	After entering or adjusting the details of the requested budget or current budget by rate code in the grids, click **Calculate** to calculate the budget totals. The system updates both the Current budget totals and the Requested budget totals on the Create/Approve Group Budget - Budget Requested page. If you have a large group, use the Budget Calculation application engine process instead of this button.

Budget

Field or Control	Description
Sequence	Select a budget by sequence if more than one budget, budget period, budget ID, effective date, and action and action reason is available for this group.

Field or Control	Description
Action	Select a budget by action if more than one budget, budget period, budget ID, and effective date is available for this group.
Reason	Select a budget by action and reason if more than one budget, budget period, budget ID, effective date, and action is available for this group.
Load Rate Codes	Click this button so that the system populates default values for all rate codes for group members as shown on their Job Data records.

Amounts Tab

When the budget is approved, this grid is not accessible. You are not able to insert or delete rows, and you cannot modify any value in the grid.

Note: If you modify a budget that was already approved, you need to recalculate the budget. You cannot save the page unless a recalculation is done. It is not possible to modify a budget that has salary increases already loaded to JOB since these increases change the status in the Propose and Summarize Raises page to Processed. If a budget is modified, the status will automatically be set to Proposed, even if the status was previously Approved.

Field or Control	Description
Rate Code	Select a base pay rate code for which you want to budget an increase. The system calculates the budget for all workers in the group who have this rate code in their compensation package.
Total Increase	Displays the result of the calculation for all workers in the group who have the rate code in their compensation packages. It shows the total increase amount for the rate code, in the currency and frequency of the rate code. For example, suppose there are five workers in the group who have the rate code and you increase the amount by 100 USD, the amount in this field is 500 USD (5×100).
Currency and **Frequency**	Display the currency and frequency that you defined for the rate code on the Comp Rate Code Table page.
Frequency	Select the frequency for the rate code. Values come from the Frequency ID table.

Changes Tab

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

Field or Control	Description
Matrix Name	Select a salary matrix if you want to calculate a budget using a salary matrix. You can enter an existing salary increase matrix name that was created using a configurable matrix. Based on the criteria of this configurable matrix, the system will then apply the appropriate increase to workers in the group when calculating the budget. Examples of criteria are performance ratings, compa-ratio, or position in range. PeopleSoft provides sample salary increase matrices. If you populate a matrix name, do not enter values in the **Change Amount** or **Change Percent** fields. When you select a salary increase matrix name, the **Details** link becomes active. Click the **Details** link if you want to go to the matrix definition, including its current data content. The system will display the relevant values that will be used during budget calculation. **Note:** If you are using performance review as an input, the review rating must be of PERFRATING type.
Change Amount	If the rate code type is Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount, you can enter a change amount for the rate code. The system calculates the budget by adding this new amount to the compensation for the rate code. If you enter a Change Amount value, the **Change Percent** field is deselected.
Change Percent	If the rate code type is Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount, you can enter a percent of increase in the amount for the rate code. The system calculates the budget by adding this percent increase to the compensation for the rate code. If you enter a Change Percent value, the **Change Amount** field is deselected.

Field or Control	Description
Change Points	If the rate code type is Points, you can enter an additional number of points for the rate code. The system calculates the budget by adding this number of points to the points for the rate code and multiplying by the point value that you define on the Comp Rate Code Table page. If you enter a Change Points value, the **Percent of Points** field is deselected.
Percent of Points	If the rate code type is Points, you can enter a percent of increase in the number of points for the rate code. The system calculates the budget by adding this percent increase to the points for the rate code and multiplying by the point value that you define in the Company Table. If you enter a Percent of Points value, the **Change Points** field is deselected.
Add Percent	If the rate code type is Percent, you can enter an additional percent for the rate code. The system calculates the budget by adding this percent to the existing rate code percent.

Current Budget Amounts and Changes

As you enter the Requested Budget details, the system copies them into the **Current Budget** grid. The approval manager can adjust the budget in the **Current Budget** grid. When you click **Calculate** or run the Budget Calculation process, the system calculates and enters the adjusted totals in the Current row on the Create/Approve Group Budget - Budget Requested page.

When the budget is approved, this grid is not accessible. You are not able to insert or delete rows, and you cannot modify any value in the grid.

The fields in this section are identical to the fields on the Amounts and Changes tabs in the Requested Budget section.

Create/Approve Group Budget - More Budget Details Page

Use the Create/Approve Group Budget - More Budget Details page (GROUP_INCR_BUDGET6) to view specific budget amounts based on groups and action and reasons combinations.

Add more budget fields and create user-defined fields to store additional budget data.

Navigation:

Compensation > **Base Compensation** > **Group Budgets** > **Create/Approve Group Budget** > **Create/Approve Group Budget - More Budget Details**

This example illustrates the fields and controls on the Create/Approve Group Budget - More Budget Details page.

Calculated Values

Field or Control	Description
Approved Budget	The budget as revised by the approver on the Create/Approve Group Budget - Budget Components page. This amount is available for distribution to group members on the Propose Raises page.
Allocation Amount	The total increase that you define in the salary increase plan associated with this budget. The amount appears in the budget currency and frequency.

Customizable Values

Field or Control	Description
Reserve Amount	Use this field to store budget amounts to be saved for allocation at a later time.
Vacant Position Budget Amount	Stores budget amounts for vacant positions.
New Position Budget Amount	Stores budget amounts for new positions.
User Defined <#>	Store additional budget values in these fields to have all budget values in one place and to use for reports.

Viewing Budget Comparisons

This section discuss how to use the Budget Comparison Inquiry pages to view budget comparisons.

Pages Used to View Budget Comparisons

Page Name	Definition Name	Usage
Compare Group Budgets - Budgets Page	BUDGET_COMPAR3_INQ	View a list of proposed budgets for the specified group ID and budget period start date. Displays the description of each budget along with its effective date and sequence.
Compare Group Budgets - Comparison Page	BUDGET_COMPAR1_INQ	View the requested amount and requested percent variance between one budget and all others that you selected on the Compare Group Budgets - Budgets page.
Compare Group Budgets - Components Page	BUDGET_COMPAR2_INQ	View budget details by rate code associated with the budget selected in the **Variance** check box on the Compare Group Budgets - Comparison page.

Compare Group Budgets - Budgets Page

Use the Compare Group Budgets - Budgets page (BUDGET_COMPAR3_INQ) to view a list of proposed budgets for the specified group ID and budget period start date.

Navigation:

Compensation > Base Compensation > Group Budgets > Compare Group Budgets > Compare Group Budgets - Budgets

This example illustrates the fields and controls on the Compare Group Budgets - Budgets page.

This page displays the budget description of each budget that you created for the specified group ID and budget period start date. Its fields are the same as those found on the Create/Approve Group Budget - Budget Requested page.

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

Field or Control	Description
Compare	Click this button to load the selected budgets into the Compare Group Budge - Comparison page.
Budget ID	Select the check box that precedes the budget ID for each budget that you want to compare with other budgets on the next page in the component.

Compare Group Budgets - Comparison Page

Use the Compare Group Budgets - Comparison page (BUDGET_COMPAR1_INQ) to view the requested amount and requested percent variance between one budget and all others that you selected on the Compare Group Budgets - Budgets page.

Navigation:

Compensation > Base Compensation > Group Budgets > Compare Group Budgets > Comparison

This example illustrates the fields and controls on the Compare Group Budgets - Comparison page.

Displays the budgets that you selected on the Compare Group Budgets - Budgets page.

Field or Control	Description
Variance	Select for the budget that you want to compare to the other budgets in the page.
Amount Variance	Displays the amount that each budget varies from the budget that you selected in the **Variance** field.
Budget Approved	Select to approve a budget on this page. You must also enter a date in the **Budget Approval Date** field. You can approve only one budget for a group ID and budget period start date. • Once you approve a budget increase for one budget, the **Budget Approved** check boxes for any other budget are unavailable for entry. • You can approve a budget increase only if all increases with prior effective date and sequence in the budget are already approved. When you approve a budget on this page, the system updates the **Budget Approved** field on the Create/Approve Group Budget - Budget Requested page.

Approving a Budget

The system performs the following checks to ensure that only one budget ID is approved for a single group ID and budget period start date:

• When you select either Budget Approved or Salary Plan Approved for any increase with effective date and effective sequence within a group budget, the system will make sure that no other budget ID for the same group has been approved.

• When you select either Budget Approved or Salary Plan Approved for any increase with effective date and effective sequence within a group budget, the system will make sure that the increases within the budget that have a previous effective date or sequence have already been approved. This action occurs because each subsequent effective date or sequence budget calculation is performed based on previous budgeted increments.

You can use a budget for a salary increase plan without approving the budget first. However, before you can run a process to load the salary changes to the Job Data records, the following approvals must be completed:

• Salary Plan Approved must be selected on the Create/Approve Group Budget - Budget Requested page.

• The individual worker increases must be marked Approved on the Summarize and Approve Raises page.

Planning Group Salary Increases

This section provides an overview of salary increase planning and discusses how to plan group salary increases.

Pages Used to Plan Group Salary Increases

Page Name	Definition Name	Usage
Calculate Group Increases Page	RUNCTL_SALPLNGRP	Run the Salary Plan Calculation application engine process. This process is recommended for calculating large groups.
Propose Raises Page	SALARY_PLAN_GRP	Apply the group increase budget to the pay components of the workers in the group. You can manually enter pay components and modify salary increases for workers in the group.
Summarize and Approve Raises Page	SAL_PLAN_GRP_APPR	Show the totals by effective date, effective sequence, action, and action reason as well as the overall grand totals of your planned salary increases.
Budget Information Page	SAL_PLAN_GRP_BDGT	Display budget information.

Understanding Salary Increase Planning

Use the Group Increases components located under **Compensation** > **Base Compensation** > **Group Increases** and the Group Budgets components under **Compensation** > **Base Compensation** > **Group Budgets** to create salary increase plans by group. The system loads the group members and their default, budgeted increases into the page, where you can view them individually. In addition to details of the worker's compensation package by rate code, the pages provide information about the worker's compa-ratio, percent in range, last increase date, salary history, and review results. This information helps you make decisions about adjusting the budgeted increase for individual workers without looking elsewhere in the system.

Complete these steps to use the Group Increases and Group Budgets components to create salary increase plans:

1. Create a group, define salary plan controls, and establish a group increase budget.

2. Run the Salary Plan Calculation process to apply the budgeted increases to the compensation packages of workers in the group.

    For small groups, use online processing instead of the batch process. To use online processing, click the **Calculate** button after accessing the Propose Raises page.

3. Adjust budgeted increases at the individual level by rate code on the Propose Raises page.

   After making changes, click the **Refresh** button on the Summarize and Approve Raises page to update the current budget on the Create/Approve Group Budget - Budget Requested page.

4. View summary information on the Summarize and Approve Raises page.

5. Approve worker raises on the Summarize and Approve Raises page.

   Approve all raises by clicking the **Approve All** button. Alternatively, you can approve or deny raises by changing the status of each worker individually.

6. Approve the Salary Plan on the Create/Approve Group Budget - Budget Requested page.

Integrating Worker Reviews and Salary Increase Plans

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

Calculating Salary Increases Based on the Budget

The system calculates worker increases using either of the following methods:

• The Salary Plan Calculation application engine process.

• Online processing on the Propose Raises page.

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

Calculate Group Increases Page

Use the Calculate Group Increases page (RUNCTL_SALPLNGRP) to run the Salary Plan Calculation application engine process.

Navigation:

Compensation > **Base Compensation** > **Group Increases** > **Calculate Group Increases** > **Calculate Group Increases**

This example illustrates the fields and controls on the Calculate Group Increases page.

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

Run the Calculate Group Increase process without selecting the **Approve All** check box to calculate the salary increases for the group, budget period start date, and budget ID.

After the process has completed, review the group increases calculated by using the Assign Group Increases pages and make increase adjustments, as needed. Once all increase adjustments have been completed, you can run Calculate Group Increases to approve all increases by selecting the **Approve All** check box or you can manually approve increases by using the Summarize and Approve Raises page.

Field or Control	Description
Approve All	When you select this check box, the system does not perform a group increase calculation. It updates the **Status** field on the Summarize and Approve Raises page to *Approved* for all group increases for the group, budget period start date, and budget ID.

Propose Raises Page

Use the Propose Raises page (SALARY_PLAN_GRP) to apply the group increase budget to the pay components of the workers in the group.

You can manually enter pay components and modify salary increases for workers in the group.

Navigation:

Compensation > **Base Compensation** > **Group Increases** > **Assign Group Increases** > **Propose Raises**

This example illustrates the fields and controls on the Propose Raises page (1 of 4).

This example illustrates the fields and controls on the Propose Raises page - Pay Components: Changes tab (2 of 4).

This example illustrates the fields and controls on the Propose Raises page - Pay Components: Conversion tab (3 of 4).

This example illustrates the fields and controls on the Propose Raises page - Salary Grade tab (4 of 4).

Rates	Salary Grade						
Job EffDt	Job EffSeq	Salary Set ID	Sal Plan	Grade	Comp-Ratio	Month Last Incr	
06/15/1996		SHARE	KUV				

Employee Salary History

You must create a group increase budget for the worker's group before using this page.

Note: This process is recommended for calculating small groups.

Identifying the Budget

Field or Control	*Description*
Salary Planning Start Date	Displays the salary planning start date that you associated with this budget ID on the Create/Approve Group Budget - Budget Description page.
Request Load	If you have workflow enabled, click this button after you have made all manual changes on this page and are ready to approve the salary plan and load the salary increases to the worker Job Data records. When you click this button, the system sends a worklist entry to the Personnel Administrator, who can then perform any necessary approvals and run the process to load the salary changes to Job. This button is hidden if you do not enable workflow.
Total in Group	Displays the total number of workers in the group.
Calculate	Click to calculate and load the default budgeted increases for group members. Do not click this button if you use the Salary Plan Calculation process before accessing this page. **Note:** Do not click this button after adjusting worker raises on this page unless you want to return to the budgeted increases without any modifications.

Field or Control	Description
Get Group	Click to load the group into the page and to make sure the workers displayed in the page are currently eligible group members. The system also updates the Total Annual Salaries on the Summarize and Approve Raises page when you click this button, because a change in the group affects the group's totals. **Note:** When you refresh the group by clicking **Get Group,** the system does not calculate the default proposed budgeted increases for workers added to the group. The system loads the page in chunks of group members. Use the **Previous** and **Next** buttons to select the data of the worker you want to view.

Propose Raises

The system enters default proposed increases based on the budget that you identified when you entered the page. It applies calculations only to budgeted rate codes that are already in the worker's compensation package. If you want to add additional salary components to the worker's compensation package or to increase components that were not originally budgeted, add these manually in the **Pay Components** grid on this page.

Field or Control	Description
Effective Sequence	Select the sequence number of the action that you defined for the budget increase on the Create/Approve Group Budget - Budget Requested page. This sequence number determines the order in which the salary increases are compounded if more than one action and reason appears in the budget for the same effective date. For example, suppose the first action and reason results in an increased amount of compensation for a rate code from 50,000 USD to 53,000 USD. The second action and reason results in an additional 3 percent for the same rate code. Because of the sequence, the system calculates and adds 3 percent of 53,000 USD.
Action and **Reason**	Select the action and reason that you defined for the budget increase on the Create/Approve Group Budget - Budget Requested page.

Field or Control	Description
New Compensation Rate	Displays the worker's new compensation rate as of the effective date, sequence, action, and reason. The **Job Curr/Freq** field displays this new compensation rate.
New Percent through Range	Displays the worker's new percent in range. The system calculates the percent in range figure from the data in the Salary Grade table.
New Annual Rate	The system calculates and displays the worker's new annual rate by applying the budgeted increase for this effective date, sequence, action, and reason to the applicable rate codes in the worker's compensation package.
Months Since Last Increase	Displays the number of months since the worker's last increase.
Change Amount	Displays the amount of the worker's total increase for this effective date, sequence, action, and reason for all components of the budget that are in the worker's compensation package.
Annual Increase Percent	Displays the worker's annualized change in terms of percent.
Change Percent	Displays the worker's total percent increase by applying the effective date, sequence, action, and action reason to all of the budget increase components that are in the worker's compensation package.
New Compa Ratio	Displays the worker's new compa-ratio. The system calculates the compa-ratio figure from the data in the Salary Grade table.
Frequency	Displays the currency code and frequency specified in the worker's Job record. The calculations appear in this currency and frequency.
Job Ratio	Displays the job ratio of the job code assigned to this worker. The job ratio is derived from the values in the **Job Ratio** group box on the Job Code Table - Default Compensation page and the worker's compensation rate.

Pay Components

The pay components listed in the grid are those defined on the Job Data - Compensation page. The grid is populated when you enter the page. When you click **Calculate,** the system applies the increases to the

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

Note: Do not click the **Calculate** button after you make manual changes on this page because you will lose your manual changes. Instead, click the **Refresh** button in the Grand Total section of the Summarize and Approve Raises page. The **Refresh** button updates the requested budget on the Budget Requested page.
If a raise status is *Processed,* then this grid is not accessible.

Amounts Tab

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

Changes Tab

Field or Control	Description
Rate Code	Displays the rate codes in the worker's compensation package. If you are manually entering a new data row, you can select a rate code from the valid values.
Seq (sequence)	Displays the sequence number of the rate code in the compensation package.
Change Amount	Displays the proposed change in the amount of compensation for the rate code, in the currency and frequency of the rate code.
Change Points	If the rate code type is Points, displays the proposed change in the points for the rate code. You can enter a value for a new data row if the rate code type is Points.
Change Percent	Displays the proposed percent of change in the compensation for the rate code.

Conversion Tab

Field or Control	Description
Source	Indicates how the pay component got into the pay components grid. Values are: • *Manual:* The pay component was added manually. • *Salary Step:* The pay component was a default value from the salary step. • *Job Code:* The pay component was provided by default from the Job Code, and so on.
Default Without Override	Used for multiple components of pay.
Apply FTE	The system indicates whether Apply FTE is selected for this rate code in the Comp Rate Code table.
Convert Comprt (converted compensation rate)	Displays the compensation rate for the rate code converted to the worker's compensation frequency and currency.

Employee Review Rating

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

Employee Salary History - Rates Tab

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

Field or Control	Description
Job EffDt (job effective date) and **Job EffSeq** (job effective sequence)	The effective date and effective sequence of the change in the worker's compensation.
Action and **Reason**	The action and reason that resulted in the change in the worker's compensation, as recorded in the Job record.
Comp Rate (compensation rate)	The worker's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
Currency and **Frequency**	The currency and frequency of the worker's compensation in the Job record for the job effective date, job effective sequence, action, and reason.
Change Percent and **Change Amount**	The percent of change and amount of change in the worker's compensation for the job effective date, job effective sequence, action, and reason.

Employee Salary History - Salary Grade Tab

Field or Control	Description
Job EffDt (job effective date) and **Job EffSeq** (job effective sequence)	The effective date and effective sequence of the change in the worker's compensation.
Salary Set ID	The setID associated with the worker's salary.
Sal Plan (salary plan) and **Grade**	The salary plan and salary grade associated with the worker's job row.
Comp-Ratio (compa-ratio)	The worker's compa-ratio for this job row, calculated from data in the Salary Grade table.

Field or Control	Description
Month Last Incr (month last increase)	The number of months since the previous salary increase.

Related Links

Budget Information Page

Summarize and Approve Raises Page

Use the Summarize and Approve Raises page (SAL_PLAN_GRP_APPR) to show the totals by effective date, effective sequence, action, and action reason as well as the overall grand totals of your planned salary increases.

Navigation:

Compensation > **Base Compensation** > **Group Increases** > **Assign Group Increases** > **Summarize and Approve Raises**

This example illustrates the fields and controls on the Summarize and Approve Raises page.

Rank	*Status	Empl ID	Record	Name	Eff Date	Seq	Action	Reason	Comp Rate	Currency	Freq	Compensation Change
0	Proposed	K0G002	0	Nichta,Issac	01/01/2001	0	PAY	MER	7242.00	USD	M	
0	Proposed	K0G004	0	Test,Beatrice	01/01/2001	0	PAY	MER	7242.00	USD	M	
0	Proposed	K0G006	0	Puddephatt,Leo	01/01/2001	0	PAY	MER	4182.00	USD	M	
0	Proposed	K0G009	0	Hunsberger,Carlton	01/01/2001	0	PAY	MER	8882.00	USD	M	
0	Proposed	K0G010	0	Bickham,Debroah	01/01/2001	0	PAY	MER	4182.00	USD	M	-48.00
0	Proposed	KU0031	0	Tipman,Scott	01/01/2001	0	PAY	MER	1200.00	USD	B	5,200.00
0	Proposed	KU0058	0	Votava,Teresa	01/01/2001	0	PAY	MER	1300.00	USD	S	5,200.00
0	Proposed	KU0104	0	Dewberry,Kitty	01/01/2001	0	PAY	MER	1300.00	USD	S	5,200.00

Group ID KU002 — KU002 — Budget ID KU002-B1 — KU002-B1
Budget Period 01/01/2001 - 12/31/2001 — Salary Planning Start Date 01/01/2001

Grand Total — Total Annual Salaries USD0.000 — Average Percent 0.00 — Refresh

Approve All

Approve Raises — Personalize | Find | View All | First 1-11 of 11 Last

Field or Control	Description
Budget Period	Displays the start and end dates that you defined for this budget ID.
Salary Planning Start Date	Displays the salary planning start date that you defined for this budget ID.
Approve All	Once you have finalized the plan, click **Approve All** to mark all increases with the *Approved* status. Increases must have the *Approved* status to be loaded into the workers' job records by the Load Salary Changes process.

Grand Total

Field or Control	*Description*
Total Annual Salaries	Displays the total of all of the salaries in the salary plan.
Average Percent	Displays the percentage of increase between the sum of the annualized salaries as of the start date of the plan and the calculated increased salaries in the plan.
Refresh	Click this button after you modify the salary increase plan. The system updates the Grand Total.

Approve Raises

Displays the following information for each worker in the group. With the exception of the **Rank** and **Status** fields, this information is identical to the information on the Propose Raises page.

Field or Control	*Description*
Rank	Enter a rank number if you want the workers to appear in an order other than by worker ID. Use this field for force ranking, such as listing workers from the highest increase to the lowest.
Status	Select *Approved, Ineligible, No Incr* (no increase), *Processed,* or *Proposed.* The default is *Proposed.* You cannot change the status to *Processed.* The Load Salary Changes process sets the status to *Processed* when it loads increases to JOB. **Note:** If the status is *Processed,* then you cannot modify the status manually.
Name	Displays the name of each member of the group.
Compensation Change	Displays the change in the worker's compensation.

Budget Information Page

Use the Budget Information page (SAL_PLAN_GRP_BDGT) to display budget information.

Navigation:

Compensation > **Base Compensation** > **Group Increases** > **Assign Group Increases** > **Budget Information**

This example illustrates the fields and controls on the Budget Information page.

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

Field or Control	Description
Refresh	Click to update the Requested Amount and Available Amount.
Available Amount	Represents the difference between the Current Budget and Requested Budget. It is calculated when you click **Refresh** or save the component. If the variance is a positive amount, the salary plan exceeds the budgeted amount. If the variance is a negative amount, the planned salaries fall short of the budgeted amount.

Field or Control	Description
Request Approval	This button appears only if the budget is approved.

If the Available Amount is negative and the budget was approved, you must request a new approval because you will not be able to save without requesting a new approval if the Available Amount is negative.

If you do not want to request a new approval, you have to leave the component without saving.

If you request a new approval, the budget will be unapproved and the Budget Approval Date will be deselected. These changes will be reflected in the Budget Requested pages. |

Loading Salary Changes to Compensation Records

This section provides an overview of loading salary changes to compensation records, lists prerequisites, and discusses how to refresh anniversary dates.

Pages Used to Refresh Anniversary Dates

Page Name	Definition Name	Usage
Refresh Anniversary Date Page	RUNCTL_GRPANNV	Populate a temporary table with required anniversary dates of workers in your group.

Note: Use this process only if your Salary Increase Plan is based on Employee Anniversary Dates, as specified on the Assign Group Budget Parameters page. |
| Load Group Increases Page | RUNCTL_CMP006 | Run the Load Salary Changes application engine process. The process loads all the new rows into your workers' job and compensation records for the budget date that you specify. |

Understanding Loading Salary Changes to Compensation Records

After you approve your salary increase plans and budgets, you can load the salary increases to the workers' Job records. The system provides a Load Salary Changes process to load all approved salary increases for the group ID and budget period start date that you specify.

This process inserts a new row for the worker in the Job record and the Compensation record. In addition to the new compensation rate, the new record contains the effective date, sequence, action, and action reason that you defined for the increase on the Create/Approve Group Budget - Budget Requested page.

Prerequisites

Before you can run the processes to load salary changes to the Job Data records:

- The **Salary Plan Approved** check box must be selected on the Create/Approve Group Budget - Budget Requested page.

- The individual worker increases must be marked *Approved* on the Summarize and Approve Raises page.

Refresh Anniversary Date Page

Use the Refresh Anniversary Date page (RUNCTL_GRPANNV) to populate a temporary table with required anniversary dates of workers in your group.

Note: Use this process only if your Salary Increase Plan is based on Employee Anniversary Dates, as specified on the Assign Group Budget Parameters page.

Navigation:

Compensation > **Base Compensation** > **Group Budgets** > **Refresh Anniversary Date** > **Refresh Anniversary Date**

This example illustrates the fields and controls on the Refresh Anniversary Date page.

Field or Control	Description
Group ID	Enter the ID of the group for which you want to refresh anniversary dates.
Budget Period Start Date	Enter the start date of the budget for which you want to refresh anniversary dates.
Budget ID	Enter the ID of the budget for which you want to refresh anniversary dates.

Load Group Increases Page

Use the Load Group Increases page (RUNCTL_CMP006) to run the Load Salary Changes application engine process.

The process loads all the new rows into your workers' job and compensation records for the budget date that you specify.

Navigation:

Compensation > **Base Compensation** > **Group Increases** > **Load Group Increases** > **Load Group Increases**

This example illustrates the fields and controls on the Load Group Increases page.

Before using this page, the salary increase budget must be approved. Each worker increase that you want to load must have approved status on the Summarize and Approve Raises page.

Field or Control	Description
Group ID	Enter the group ID for which you want to load salary changes.
Budget Period Start Date	Enter the budget period start date for which you want to load the group's salary changes.
Position	Select to choose workers who have a position.
Update Future Rows	Select to update the Job and Compensation future rows with the increase.

(MEX) Defining the Increase Matrix Method

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

• Standard budget raise method.

• Salary increase matrix method.

With the standard budget raise method, you can take the budgeted percentage and insert it into the worker's salary plan. With the salary increase matrix method, you can take the percentage from the salary increase matrix.

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

To calculate the salary increase if you select the By Matrix increase method:

1. Determine the result of the last evaluation before the increase effective date.

2. Determine the worker compensation quartile.

3. Determine the increase percentage.

4. Update worker data with the new raise percentage.

The following topics define how you calculate the salary increase matrix method.

Step 1 - Determine the Result of the Last Evaluation

Go to the Employee Review page to see the results. The **Review Rating** field indicates the result of the last evaluation. In our example, the worker received a review rating of *3 (Average)* in his last evaluation.

Verify the effective date of the last evaluation on the Propose Raises page. In our example, the last effective date entered, indicated in the **Start Date** field, is 04/01/2000.

Note: Also enter the effective date for the new evaluation on the Propose Raises page.

Step 2 - Determine the Worker Compensation Quartile

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

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

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

Once we have determined the worker's monthly salary, we look at the quartile.

On the Salary Grade Table page, you see the minimum, midpoint, and maximum salary ranges for the worker's salary grade.

Determine the worker's quartile using this formula:

This diagram illustrates the worker's quartile formula.

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

The quartiles for the salary ranges are **Below, Quartile 1, Quartile 2, Quartile 3,** and **Quartile 4.**

Frequency	Below	Quartile 1	Quartile 2	Quartile 3	Quartile 4
Annual	39,600.00	45,227.50	50,855.00	56,482.50	62,110.00
Monthly	3,300.00	3,768.96	4,237.92	4,706.87	5,175.83
Daily	152.31	173.96	195.60	217.25	238.89
Hourly	19.04	21.75	24.45	27.16	29.86

Since our worker's monthly salary is 2166.67, we determine that this worker is in the **Below** range.

Note: The data used on the quartile formula is taken from the Salary Grade table.

Step 3 - Determine the Increase Percentage

Look at the Salary Increase Matrix table on the Define Salary Increase Matrix Table page to determine the salary increase percentage. In our example, we have a range, instead of an amount, so we need to calculate the average to find the increase percentage.

The information needed to determine the increase percentage for this worker is as follows:

- Review result = 3 (Average)

- Quartile = Below minimum

- Matrix = KUEX

Go to the Define Salary Increase Matrix Table page. There, in the **Salary Increase Matrix** group box, you see the minimum and maximum ranges for the increase percentages for each quartile.

For the Below Minimum range, you see that the minimum percentage is 5.0 and the maximum percentage is 9.0.

We calculate the increase percentage as follows:

This diagram illustrates the formula used by the system to calculate the increase percentage.

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

So, this worker will receive a salary increase percentage of 7 percent.

Step 4 - Update Worker Data with the New Raise Percentage

Go to the Create/Approve Group Budget - Budget Components page to update the new salary increase. There, on the Changes tab, enter the rate code that corresponds to the increase percentage.

Once you have entered the new raise percentage, the worker's new salary, change amount, and change percent appear.

Related Links

<u>Setting Up Salary Plans, Grades, and Steps</u>

Chapter 7

Defining, Assigning, and Approving Merit Increases

Defining Merit Increase IDs and Groups

To define merit increase IDs and groups, use the Define Merit Group (SP_MERIT_ELIG_GBL) and Define Merit Increase (SP_MERIT_INCR_TBL_GBL) components.

This section discusses how to define merit increase IDs and groups.

Note: Before you can assign and approve merit increases for workers, you must first define merit increase IDs and merit groups.

Pages Used to Define Merit Increase IDs and Groups

Page Name	*Definition Name*	*Usage*
Define Merit Increase Page	SP_MERIT_INCR_DEFN	Define Merit Increase IDs for merit points or merit ranges.
Review Results Resolution Page	SP_MERIT_INCREASES	Define merit increase guidelines (review results resolutions) per merit point or per merit range.
Define Merit Group Page	SP_MERIT_ELIG	Define review selection criteria for a Group ID. The system will use the information to retrieve worker reviews.

Define Merit Increase Page

Use the Define Merit Increase page (SP_MERIT_INCR_DEFN) to define Merit Increase IDs for merit points or merit ranges.

Navigation:

Compensation > **Base Compensation** > **Merit Increases** > **Define Merit Increase**

This example illustrates the fields and controls on the Define Merit Increase page.

Field or Control	Description
Status	Select *Active* or *Inactive.* Only merit increase types with a status of *Active* can be used.
Description	Enter a description of the **Merit Increase ID.**
Merit Increase Type	Indicate if the merit increase is by point **(Merit Increase by Point),** by point range **(Merit Increase by Points Range),** or by review rating **(Merit Increase by Revw Rating).** The system will display different fields on the Review Points Resolution page, depending on which option you choose.

Review Results Resolution Page

Use the Review Results Resolution page (SP_MERIT_INCREASES) to define merit increase guidelines (review results resolutions) per merit point or per merit range.

Navigation:

Compensation > **Base Compensation** > **Merit Increases** > **Define Merit Increase** > **Review Results Resolution**

This example illustrates the fields and controls on the Review Results Resolution page.

This example illustrates the fields and controls on the Review Results Resolution page: Range tab.

| Define Merit Increase | Review Results Resolution |

Merit Increase ID K0001

Merit Increase ⑦   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date 01/01/1980   Effective Status Active

Merit Increase by Points Range   Personalize | Find | 🗗 | 🏢   First ◀ 1-4 of 4 ▶ Last

| Range | Flat Amount/Hourly | Percent | Salary Points |

	*Range ID	From Points	To Points	Rate Code	Description	Rate Code Type		
1	1	30	35	K0GRCN 🔍	Percent	Percent	➕	➖
2	2	36	40	K0GRCN 🔍	Percent	Percent	➕	➖
3	3	41	45	K0GRCN 🔍	Percent	Percent	➕	➖
4	4	46	50	K0GRCN 🔍	Percent	Percent	➕	➖

This example illustrates the fields and controls on the Review Results Resolution page: Flat Amount/ Hourly tab.

| Define Merit Increase | Review Results Resolution |

Merit Increase ID K0001

Merit Increase ⑦   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date 01/01/1980   Effective Status Active

Merit Increase by Points Range   Personalize | Find | 🗗 | 🏢   First ◀ 1-4 of 4 ▶ Last

| Range | Flat Amount/Hourly | Percent | Salary Points |

	*Range ID	Change Amount	Currency	Frequency	Description	Change Percent		
1	1						➕	➖
2	2						➕	➖
3	3						➕	➖
4	4						➕	➖

This example illustrates the fields and controls on the Review Results Resolution page: Percent tab.

| Define Merit Increase | Review Results Resolution |

Merit Increase ID K0001

Merit Increase ⑦   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date 01/01/1980   Effective Status Active

Merit Increase by Points Range   Personalize | Find | 🗗 | 🏢   First ◀ 1-4 of 4 ▶ Last

| Range | Flat Amount/Hourly | Percent | Salary Points |

	*Range ID	Change Percent	Rate Code Group	Description		
1	1	3.00	🔍		➕	➖
2	2	5.00	🔍		➕	➖
3	3	10.00	🔍		➕	➖
4	4	12.00	🔍		➕	➖

This example illustrates the fields and controls on the Review Results Resolution page: Salary Points tab.

Field or Control	Description
Rate Code	Select a value for the **Rate Code** field to associate with this merit increase ID. If you select a rate code with a Rate Code Type of: • *Flat Amount* or *Hourly,* enter a **Change Amount** or a **Change Percent** value, but not both. • *Percent,* enter a **Change Percent** and **Rate Code Group** (if you are using rate code groups). • *Points,* enter **Change Points** or **Change Percent,** but not both.
Change Amount	Enter the salary change amount, currency, and the frequency with which it is paid.
Change Points	Enter the change in points.
Change Percent	Enter the salary change percent.
Rate Code Group	Select a rate code group.

Merit Increase by Points Range

The system displays the Merit Increase by Points Range table when you select **Merit Increase by Points Range** on the Define Merit Increase page.

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

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

Define Merit Group Page

Use the Define Merit Group page (SP_MERIT_ELIG) to define review selection criteria for a Group ID.

The system will use the information to retrieve worker reviews.

Navigation:

Compensation > **Base Compensation** > **Merit Increases** > **Define Merit Group**

This example illustrates the fields and controls on the Define Merit Group page.

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

• Have a review Period End Date in the Employee Review that is the latest date in the timeframe on the page.

• Have a Review Type matching the one defined.

Assigning, Approving, and Loading Merit Increases

This section discusses how to assign and approve merit increases.

Pages Used to Assign and Approve Merit Increases

Page Name	Definition Name	Usage
Assign/Approve Merit Increase Page	SP_MERIT_INCR_GRP	Calculate merit increases for the workers in the selected group based on the workers' review results and the merit increase guidelines associated with the Merit Increase ID.
Merit Increase Details Page	SP_MERIT_INCR_EE	Review details about the worker merit increase and make changes, if required.
Load Merit Increases Page	RUNCTL_SP_MERIT	Load the approved merit increases into worker job data and flag the increases as processed.
Report Merit Increases Page	RUNCTL_SP_MERIT	Create a report on the merit increases for a group of workers.

Understanding the Assign/Approve Merit Increases Component

Use the Assign/Approve Merit Increases component to:

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

- Calculate merit increases for a group of workers based on the review results and a Merit Increase ID.

- Adjust the merit increases calculated by the system.

- Approve or deny merit increases for individual workers in a group.

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

Assign/Approve Merit Increase Page

Use the Assign/Approve Merit Increase page (SP_MERIT_INCR_GRP) to calculate merit increases for the workers in the selected group based on the workers' review results and the merit increase guidelines associated with the Merit Increase ID.

Navigation:

Compensation > **Base Compensation** > **Merit Increases** > **Assign/Approve Merit Increases** > **Assign/Approve Merit Increase**

This example illustrates the fields and controls on the Assign/Approve Merit Increase page.

Field or Control	Description
Get Review Results	Click to retrieve the review results for the workers in the merit group (as defined on the Define Merit Group page).
Merit Increase ID	Select a Merit Increase ID to apply to the members of this merit Group ID. Merit Increase IDs are defined on the Define Merit Increase component.
(Re)Calculate Increases	Click to calculate or recalculate merit increases. The system uses the change values entered on the Define Merit Increase component. The system sets the **Status** to *Proposed* for each worker listed. If the merit increase is zero (0), the system sets the status to *No Increase*. **Note:** Click only to calculate the merit increases based on the review points resolution associated with the Merit Increase ID. If you click this button after having made manual changes, the system will erase your changes and reapply the changes associated with the Merit Increase ID.

Field or Control	*Description*
Status	Select one of the following statuses for each worker's merit increase: • *Approved* When you select this value, the system makes the merit increase fields unavailable for entry. Select to approve the merit increase. • *Ineligible* When you select this value, the system makes the merit increase fields unavailable for entry. Select if the worker is ineligible for a merit increase. • *No Incr* (no increase) When you select this value, the system makes the merit increase fields unavailable for entry. Select to deny the worker the calculated increase. • *Proposed* Select to manually adjust the merit increase amount calculated by the system on the Merit Increase Details page, if required. The system selects the **Manually Updated** flag on the Merit Increase Details page when you make an adjustment. Once you have entered the appropriate merit increase, select *Approved* to approve the increase or *No Incr* or *Ineligible* to deny it. • *Processed* The system selects this status when it has processed a merit increase for this worker. You cannot modify the merit increase or status for this worker. **Note:** You can manually change a worker's merit increase on the Merit Increase Details page before you select a status.
Approve All	Click to set the status from *Proposed* to *Approved.* The system does not modify the statuses *No Incr, Ineligible,* and *Processed.* **Note:** You can manually change a worker's merit increase on the Merit Increase Details page before you approve all the merit increases.

Merit Increase Details Page

Use the Merit Increase Details page (SP_MERIT_INCR_EE) to review details about the worker merit increase and make changes, if required.

Navigation:

Compensation > Base Compensation > Merit Increases > Assign/Approve Merit Increases > Merit Increase Details

This example illustrates the fields and controls on the Merit Increase Details page (1 of 2).

This example illustrates the fields and controls on the Merit Increase Details page (2 of 2).

Field or Control	Description
Rate Code	If changes are necessary, select a **Rate Code** to associate with this Merit Increase ID. If you select a Rate Code with a Rate Code Type of: • *Flat Amount* or *Hourly,* enter a **Change Amount** or a **Change Percent** value. • *Percent,* enter a **Change Percent** and **Rate Code Group** (if you are using rate code groups). • *Points,* enter **Change Points** and **Frequency** or **Change Percent.**
Status	Select the appropriate status for this worker's merit increase (values listed on the Assign/Approve Merit Increase page). To approve the changes, select *Approve.*

Load Merit Increases Page

Use the Load Merit Increases page (RUNCTL_SP_MERIT) to load the approved merit increases into worker job data and flag the increases as processed.

Navigation:

Compensation > **Base Compensation** > **Merit Increases** > **Load Merit Increases** > **Load Merit Increases**

This example illustrates the fields and controls on the Load Merit Increases page.

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

Report Merit Increases Page

Use the Report Merit Increases page (RUNCTL_SP_MERIT) to create a report on the merit increases for a group of workers.

Navigation:

Compensation > **Base Compensation** > **Merit Increases** > **Report Merit Increases** > **Report Merit Increases**

This example illustrates the fields and controls on the Report Merit Increases page.

Field or Control	Description
Group ID, Doc Type, Period End - From Date, and **Period End - Through Date**	Select values for these fields for the workers whose merit increase data you want to report on.

Chapter 8

Processing Mass Salary Increases

Updating Salaries by Salary Plan or Pay Group

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

Page Used to Run the Sal Plan/Paygroup Process

Page Name	Definition Name	Usage
Update By Plan/Paygroup Page	RUNCTL_CMP008	Update the job compensation rate when the salary grade or step changes retroactively.

Understanding Salary Updating

Use the Update by Sal Plan/Paygroup (update by salary plan or pay group) process to perform salary grade or step updates for all workers in a salary grade. This functionality is useful if the compensation changed retroactively. Use pay group parameters or salary plan parameters to run the update.

The system performs the following processes for all workers in the specified pay group or salary grade during the specified time period:

- For grade changes, the system checks the Salary Grade table for any changes in minimum, midpoint, and maximum pay rate during the specified dates for the worker's job. If it finds a pay rate change, it enters a new job row with the effective date of the grade change.

- For step changes, the system compares the compensation package of the worker with the package of the step. If it finds a change in the step, it enters a new job row with the effective date of the step change, the new package, and marks it as a manual change.

You complete these steps to run the Update by Sal Plan/Paygroup process:

1. Run the process (CMP008) using PeopleSoft Application Engine to apply the update to the salary plan or pay group.

2. Run the SQR report (CMP008) to review the data created by running the process.

3. In a separate run, run process HR_SP_CI using PeopleSoft Application Engine to load data to the Job Data pages for your workers.

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

After the processes have run, you can use the Below Minimum Analysis report to audit your work. The Below Minimum Analysis report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

Update By Plan/Paygroup Page

Use the Update By Plan/Paygroup page (RUNCTL_CMP008) to update the job compensation rate when the salary grade or step changes retroactively.

Navigation:

Compensation > **Base Compensation** > **Maintain Plans** > **Update by Plan/Paygroup** > **Update By Plan/Paygroup**

This example illustrates the fields and controls on the Update By Plan/Paygroup page.

Report Request Parameter(s)

Field or Control	Description
Start Date and **End Date**	Enter the start and end dates of the period. The system retrieves the salary change between these dates.

Field or Control	Description
Show Components on Report	Select if you want the pay components to appear on the report.
Action and Reason	Enter the action and reason defining the salary update on the new job row.
Update Future Rows	Select to have the process update future dated rows (those rows with an effective date later than the Salary Change Effective Date) with salary information.
Don't Absorb Changes	Select to instruct the system to leave absorbable rate codes unchanged if the system provides the salary amount by default. This option only applies to workers who have a Target Comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

Process By

Field or Control	Description
Group ID	Select to process by Group ID. The Group ID field will become available. Enter the Group ID you want to process.
Paygroup	Select to process by pay group. The fields in the Paygroup Parameters group box become available.
Sal Plan/Grade (salary plan/grade)	Select to process by salary plan and grade. The fields in the Sal Plan/Grade Parameters group box become available.

Paygroup Parameters

Field or Control	Description
Company and Pay Group	Select the company and pay group for which you want to update salaries.

Salary Administration Plan

Field or Control	Description
Business Unit, Sal Plan (salary administration plan), and **Salary Grade**	Select the business unit, salary administration plan, and salary grade for which you want to update salaries.

Related Links

Define Salary Plan Page

Updating Salaries by Job Code

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

Page Used to Update by Job Code

Page Name	Definition Name	Usage
Update By Job Code Page	RUNCTL_CMP010	Reclassify a job code.

Understanding the Update by Job Code Process

Use the Update by Job Code process to update salary data for all workers in a job code when you change the job code salary administration plan, grade, or step in the Job Code table. The process inserts a new job row with the action and action reason codes that you specified on the Run Control page. The effective date of the change is the From Date that you specified as the run control parameter.

Update By Job Code Page

Use the Update By Job Code page (RUNCTL_CMP010) to reclassify a job code.

Navigation:

Compensation > **Base Compensation** > **Maintain Plans** > **Update By Job Code** > **Update By Job Code**

This example illustrates the fields and controls on the Update By Job Code page.

Report Request Parameter(s)

Field or Control	Description
Start Date and **End Date**	Enter the start and end dates of the period for which you want to update salaries. The system uses the **Start Date** as the effective date of the salary change.
Action and **Reason**	Select the action and reason code that you want the system to enter on the new job row for the salary update.
Update Future Rows	Select to have the process update future dated rows (those rows with an effective date later than the Salary Change Effective Date) with salary information.
Don't Absorb Changes	Select to instruct the system to leave absorbable rate codes unchanged if the default salary amount changes.

This option applies only to workers who have a Target Comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled. |

Process By

Field or Control	*Description*
Group ID	Select to process by Group ID. The **Group ID** field will become available. Enter the Group ID you want to process.
Jobcode	Select to process by job code. The fields in the **Jobcode Parameters** group box become available.

Jobcode Parameters

Field or Control	*Description*
Business Unit	Select the business unit for which you want to update salaries.
Job Code	Select the job code that you are updating.

Related Links

Assigning, Approving, and Loading Merit Increases

(USF) Administering Mass Pay Adjustments

To administer mass pay adjustments for federal workers, use the Mass Pay Adjustments USF (MASS_PAY_SETUP) and Create Mass Pay Adjustment USF (RUN_FGPY005) components.

This section provides overviews of mass pay adjustments and mass pay adjustment parameters and discusses how to define mass pay adjustments.

Pages Used to Define Mass Pay Adjustments

Page Name	*Definition Name*	*Usage*
Mass Pay Type Page	GVT_MPA_TYPE_TBL	Define the percentage of the pay increase and the date that the pay adjustment will go into effect. In addition, adjustment control information, such as Action, Reason Code, and NOA code data is necessary for the SF50.

Page Name	Definition Name	Usage
Mass Pay Plans Page	GVT_MPA_ERNPGM_TBL	Identify the pay plan to be included in the pay adjustment processing as well as the type of calculation to be used. Multiple pay plans can also be processed one at a time.
Mass Pay Adjustment Pay Tables Page	GVT_MPA_PAYTBL_SEC	View the pay table associated with the mass pay adjustment.
Create Mass Pay Adjustments Page	RUN_FGPY005	Indicate the parameters required to process the mass pay adjustments or, alternatively, to generate a report. You can process a single agency and pay adjustment type or multiple agencies and adjustment types.
Load Salary Tables USF Page	RUNCTL_FGHR029	Load salary adjustment information from a file into the system for a particular company.
Designated Agents Page	GVT_DESIG_AGT_TBL	Enter contact and address information for another person to whom you may want to have your paycheck delivered.

Understanding Mass Pay Adjustments

PeopleSoft HR for U.S. Federal Government enables you to administer and manage mass pay adjustments.

During the calendar year, the U.S. President or his or her pay agent may authorize changes in the salary structures for executive branch workers covered by Title 5 of the United States Code. This authority extends to other workers covered under other sections of Title 5, as well as some workers covered under other sections of the law.

The President may also authorize changes in geographic comparability adjustments, such as Locality Pay Adjustments, Interim Geographic Adjustments, or Special Pay Adjustments for Law Enforcement Officers, authorized by the Federal Employees Pay Comparability Act (FEPCA) and administered under 5 USC 5304.

The U.S. Congress, as well as heads of certain agencies, has the discretionary authority to adjust pay for certain categories of their workers. These authorities generally authorize pay adjustments for salaried workers to be effective government-wide at the beginning of the first pay period of the new calendar year.

You complete these steps to administer mass pay adjustments:

1. Define mass pay adjustment parameters on the Mass Pay Type page and the Mass Pay Plan page.

2. Process a pay adjustment for workers on the Create Mass Pay Adjustments page.

3. Generate a mass pay adjustment report.

Defining Mass Pay Adjustment Parameters

Before performing mass pay adjustments, you must define Mass Pay Types and Mass Pay Plans for each Mass Pay Adjustment Type. The Mass Pay Adjustment Types that are available include:

• Annual Federal Wage Service

• FWS Special Rate Increase

• GS Annual Pay Adjustment

• GS Special Rate Increase

• LEO Special Pay Adjustment

• Locality Pay Adjustment

Note: Mass pay adjustments can be processed using either a percentage increase or a calculated increase using the updated pay table salaries. Once a pay adjustment is calculated, you must update the Next Scheduled Pay Adjustment data in the Salary Plan table.

Mass Pay Type Page

Use the Mass Pay Type page (GVT_MPA_TYPE_TBL) to define the percentage of the pay increase and the date that the pay adjustment will go into effect.

In addition, adjustment control information, such as Action, Reason Code, and NOA code data is necessary for the SF50.

Navigation:

Set Up HCM > **Product Related** > **Payroll for North America** > **Compensation and Earnings** > **Mass Pay Adjustments USF** > **Mass Pay Type**

This example illustrates the fields and controls on the Mass Pay Type page.

Field or Control	Description
Group ID	Displays the group ID that you entered in the search criteria to access the page. Specifying a group ID enables the FGPY005 application engine program to process mass pay adjustments for that group of employees rather than all employees, thereby reducing performance time.
Percentage	Specify the percentage of increase for the pay adjustment. If the calculation type on the Mass Pay Plan equals *Percent,* the system will use the value in this field. The **Effective Date** and **Percentage** entered become part of the key fields in the Mass Pay Plan table.
Action	Specify the appropriate action code for this mass pay adjustment. The value selected here will be reflected on the Data Control page at the worker level.
Reason Code	Enter the corresponding reason code for the specified action. The value selected here will be reflected on the Data Control page at the worker level.
Nature of Action Code	Enter the nature of action (NOA) code that justifies this mass pay.
Authority Order Nbr (authority order number)	Use this free-format field to enter the executive order number or other legal authority number that identifies which executive order was issued for pay raises. This information will print on SF50.

Mass Pay Plans Page

Use the Mass Pay Plans page (GVT_MPA_ERNPGM_TBL) to identify the pay plan to be included in the pay adjustment processing as well as the type of calculation to be used.

Navigation:

Set Up HCM > **Product Related** > **Payroll for North America** > **Compensation and Earnings** > **Mass Pay Adjustments USF** > **Mass Pay Plans**

This example illustrates the fields and controls on the Mass Pay Plans page.

Field or Control	Description
Group ID	Displays the group ID that you entered in the search criteria to access the page.
	Specifying a group ID enables the FGPY005 application engine program to process mass pay adjustments for that group of employees rather than all employees, thereby reducing performance time.
Pay Plan	Enter the pay plan for the group of workers to receive the pay adjustment. You can include multiple pay plans, if necessary.
Authority (1) and **Authority (2)**	Enter the legal authorities for the mass pay adjustment.
Mass Pay Calculation Type	Specify the type of calculation to be used in pay adjustment processing: *Pay Tables, Percentage,* or *Special Calculation Routine.*
Identify Mass Pay Table	Specify which pay table entries should be included or excluded from the pay adjustment. Values are *Exclude Tables Listed, Include All For Pay Plan,* and *Include Tables Listed.* Unless all pay tables are to be included in processing pay adjustments, the **Pay Tables** link will appear, enabling you to specify the appropriate selections.
Pay Tables	Click to access the Mass Pay Adjustment Pay Tables page (GVT_MPA_PAYTBL_SEC) to specify the pay tables to include or exclude when processing this mass pay adjustment.

Create Mass Pay Adjustments Page

Use the Create Mass Pay Adjustments page (RUN_FGPY005) to indicate the parameters required to process the mass pay adjustments or, alternatively, to generate a report.

You can process a single agency and pay adjustment type or multiple agencies and adjustment types.

Navigation:

Set Up HCM > Product Related > Payroll for North America > Compensation and Earnings > Create Mass Pay Adjustment USF > Create Mass Pay Adjustments

This example illustrates the fields and controls on the Create Mass Pay Adjustments page.

Field or Control	Description
Group ID	Select the group ID to process. Selecting a group ID enables the FGPY005 application engine program to process mass pay adjustments for that group of employees rather than all employees, thereby reducing performance time.
Pay Adjustment Type	Select the type of pay adjustment to be processed by agency. You can process multiple agencies and pay adjustment types.
Percentage	Specify the percentage of the pay adjustment.
GVT Mass Pay Adj Process Act (government mass pay adjustment process action)	Indicate whether you want to generate a report only or process the action and produce a report.

Important! Run the Mass Pay Adjustments Application Engine process before you run the Mass Pay Adjustments SQR report.

Note: Make sure that an entry for Mass Pay (FGPY005) for the *USFED* transaction appears on the Transaction Setup page (**Set Up HCM > Product Related > Workforce Administration > Workforce Data USF > Approval Transaction setup**). Click the Batch Programs tab to verify that the USFED transaction is included.

Generating a Mass Pay Adjustment Report

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

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

These types of exceptions will appear in the report:

•   Pay Rate Determinant of worker—review and process manually.

•   Future effective-dated action detected—review and process manually.

•   Duplicate action found for transaction—review and process manually.

•   No pay rate found for the worker.

•   No hourly conversion factor for worker standard hours.

•   The FEGLI base rate is not updated because of the override flag.

Once the Mass Pay Adjustment process executes, the Mass Pay Type Definition you created will be updated with a status of *Processed*.

Load Salary Tables USF Page

Use the Load Salary Tables USF page (RUNCTL_FGHR029) to load salary adjustment information from a file into the system for a particular company.

Navigation:

Set Up HCM > **Product Related** > **Payroll for North America** > **Compensation and Earnings** > **Load Salary Tables USF** > **Load Salary Tables USF**

This example illustrates the fields and controls on the Load Salary Tables USF page.

Field or Control	Description
Wage System Tables	Select this check box if you want the system to import information from the tables containing data for wage system employees.
Input Filename	Enter the path to the file from which you want to load salary table information.
Next Scheduled Pay Adjustment	Select or enter the date of the next scheduled pay adjustment.
Salary Matrix Code	Select the salary matrix code. Salary matrices define the common characteristics of a salary plan.
Company	Select the name of the company for which you wants to load salary table information.

Designated Agents Page

Use the Designated Agents page (GVT_DESIG_AGT_TBL) to enter contact and address information for another person to whom you may want to have your paycheck delivered.

Navigation:

Set Up HCM > **Product Related** > **Payroll for North America** > **Compensation and Earnings** > **Designated Agents USF** > **Designated Agents**

This example illustrates the fields and controls on the Designated Agents page.

Note: In the Payroll Interface application on the Payroll Options 2 page, you can enter a different location code to use as a sort option for printing checks. In this case, the system uses the designated agent address and transmits the check for office delivery. If you select the **Other Location** option, you also must select a setID and a location code. On the Address Information page in Workforce Administration, the designated agent identifies the person designated in the employee's agency to whom the employee's check is mailed. This value is prompted from the Designated Agent table.

Field or Control	Description
Description	Enter *Designated Agent* in this field.
Contact Name	Enter the name of the person to whom you want the company to send your paycheck.
Country	Select the country in which the address is located.
Address	Displays the address where the paycheck will be sent.
Edit Address	If you are entering a new address or if the page is in correction mode, the system activates this button. Click it to enter a new address or overwrite the old one.

Chapter 9

(JPN) Updating Salaries for Japan

Understanding Updating Salaries for Japan

The methods for updating salaries in Japan involve some functionality-specific setup and, depending on the salary increase method your organization uses, some or all of the following:

- Calculation of increases based on worker review results.

- Simulation of salary increases and manual adjustments.

- Loading of salary increases to worker job compensation records.

The three salary increase methods are:

- Step increases

- Amounts

- Percentages

The final processes associated with each of these methods produce new compensation records for each worker with an action of *Pay Rt Change* (pay rate change) and a reason of *Salary Increase by Step, Salary Increase by Amount,* or *Salary Increase by Percent.*

All the salary increase processes include worker review results in their calculation. Because review IDs are actually effective dates and the system automatically retrieves the results of the latest salary review after you specify the review ID for the process, you can be sure the system will use correct review results.

Prerequisites

All three salary increase methods must be based on worker reviews that have been resolved into a review band, meaning that worker reviews for these salary increase methods must be based on a review rating scale that has a scale type of *Review Band.*

Load Process

The load processes that are associated with each of the three salary increase methods—load steps, load amount, and load percentage increase—include a check of the worker's job record effective dates, action and action reason, and job code. The load process terminates for the worker and reports the worker on the error list if either of these conditions exists:

- A job row has an effective date equal to the Salary Increase Date that you set, and the action and reason combination is *Promotion* and *Salary Grade Advance.*

- A job row has an effective date equal to the Salary Increase Date that you set, and the Job Code for that effective-dated job row differs from the Job Code for the previous effective-dated job row.

Common Elements Used in This Section

Field or Control	Description
Language	Required because, although this batch process is a load process, an error list may occur, which you need to read.
SetID	Enter the setID for the review ID that the system should use to calculate the worker's review-based salary increase. Because you can link a single review ID to multiple setIDs, you must identify the review by its setID and its own ID.
Review ID	Enter the ID of the review on which the selected process is to base its load.

Updating Salaries by Step Increase

To update salaries by step increase use the Step Increase JPN (STEPINC_TBL_JPN_GBL) component.

This section provides an overview of the step increase process and discusses how to update salaries by step increase.

Pages Used to Update Salaries by Step Increase

Page Name	Definition Name	Usage
Define Step Increase Page	STEPINC_TBL_JPN	Associate several salary step increases with a rating model and review rating.
Load Salary Steps Page	RUN_STEP_JPN	Update the salary step and associated compensation on the job record for workers who have a fixed amount Plan/Grade/Step-based salary component.

Understanding the Step Increase Process

Updating salaries by step increase requires that you set up a Step Increase table in which you associate several salary steps with a review band. Each worker's review band is derived from the points awarded by single or multiple reviewers using weighted or nonweighted reviews. After you have the salary step increase for each review band and each worker's review band, you can run a process to load the salary step increases for each worker.

Note: To run the update process for this method of salary increase, select the **Multi-Step Grade** check box on the Installation Table - HCM Options page.

To update salaries by step increase:

1. Set up review bands and the number of steps to increase.

2. Run the JPN Load Salary Steps process.

Define Step Increase Page

Use the Define Step Increase page (STEPINC_TBL_JPN) to associate several salary step increases with a rating model and review rating.

Navigation:

Compensation > **Base Compensation** > **Step Increase JPN** > **Define Step Increase** > **Define Step Increase**

This example illustrates the fields and controls on the Define Step Increase page.

Field or Control	Description
Rating Model and **Review Rating**	Enter the rating model and review rating.
Increase Steps	Enter the number of salary step increases to associate with the rating model that you entered. Workers in this rating model receive the salary that is associated with the step to which they move. For example, if they increase three steps for being in Rating Model A, then they increase from the salary for Step 2 to the salary for Step 5.

Load Salary Steps Page

Use the Load Salary Steps page (RUN_STEP_JPN) to update the salary step and associated compensation on the job record for workers who have a fixed amount Plan/Grade/Step-based salary component.

Navigation:

Compensation > **Base Compensation** > **Step Increase JPN** > **Load Salary Steps** > **Load Salary Steps**

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

Field or Control	Description
Calculation As Of Date	The effective date the system uses to determine which job compensation record it should use to obtain the worker's current data to calculate the new data. For example, if the worker's review band earns the worker a three-step increase, the system must use the existing step to calculate the new step.
Salary Increase Date	This value becomes the effective date of the new job record that the system inserts for the worker for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Step,* respectively.
Group ID	Enter specific groups for the system to process. If you select no groups, the system processes all workers with a salary plan, grade, and step in their compensation record and a compensation rate code that is defined in the Salary Rate Code table.

Updating Salaries by Salary Amount Increase

To update salaries by salary amount increase, use the Salary Increase Amount JPN (SALINC_AMT_TBL_JPN_GBL) component.

This section provides an overview of the salary amount increase process and discusses how to update salaries by salary amount increase.

Pages Used to Update Salaries by Salary Amount Increase

Page Name	Definition Name	Usage
Define Salary Increase Amount Page	SALINC_AMT_TBL_JPN	Define the salary increase amount for a particular compensation rate code, rating model, and review rating.
Load Salary Amount Increase Page	RUN_UPSALAMT_JPN	Run the salary update process using the values that you set up in the Sal Inc Amount table.

Understanding the Salary Amount Increase Process

Using the updating salaries by salary amount increase method requires that you set up a Salary Increase Amount table in which you associate a compensation rate code with review bands and monetary increase amounts with each review band. Each worker's review band is derived from the points awarded by single or multiple reviewers using weighted or nonweighted reviews. After you have the salary increase amount for each review band and each worker's review band, you can run a process to load the salary increase for each worker.

When you set up the Salary Increase Amount table, you can select only compensation rate codes that are flat amount types and not of class *GRPPAY* or *SENPAY.*

To update salaries by salary amount:

1. Set up rate codes, review bands, and increase amounts.

2. Run the JPN Load New Salary Amount process.

Define Salary Increase Amount Page

Use the Define Salary Increase Amount page (SALINC_AMT_TBL_JPN) to define the salary increase amount for a particular compensation rate code, rating model, and review rating.

Navigation:

Compensation > **Base Compensation** > **Amount Increase JPN** > **Define Salary Increase Amount** > **Define Salary Increase Amount**

This example illustrates the fields and controls on the Define Salary Increase Amount page.

Enter the compensation rate code whose value you are updating. The compensation rate code must *not* be of class *SENPAY* and must be of type *Flat Amount*.

Field or Control	Description
Rating Model and **Review Rating**	Enter the rating model and review rating for which to enter a salary increase amount.
Amount of Salary Increase	Enter the amount of the salary increase for workers whose review results put them in the rating model that you specified.

Load Salary Amount Increase Page

Use the Load Salary Amount Increase page (RUN_UPSALAMT_JPN) to run the salary update process using the values that you set up in the Sal Inc Amount table.

Navigation:

Compensation > **Base Compensation** > **Amount Increase JPN** > **Load Salary Amount Increase** > **Load Salary Amount Increase**

This example illustrates the fields and controls on the Load Salary Amount Increase.

Field or Control	Description
Calculation As Of Date	The effective date that the system uses to determine from which job compensation record it should get the worker's current data to calculate new data. For example, if the worker's review band earns the worker an increase, the system must get the existing rate code amount to calculate the new rate code amount.
Salary Increase Date	Becomes the effective date of the new job record that the system inserts for the worker for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Amount.*
Rate Code	Enter the rate codes for which you defined a salary increase to include in this load process. The system displays the short description, currency, and compensation frequency associated with each rate code. <hr> **Note:** You defined your salary increases by compensation rate code and review band. You can run the process for multiple rate codes.
Group ID	Enter group IDs for workers to be included in this process. Leave this blank to have job compensation records updated for all workers who have the rate code that you specified. If a worker in a group that you specify does not have the compensation rate code that you specified for processing, the system skips the worker without processing.

Updating Salaries by Percentage

To update salaries by percentage, use the Define Salary Increase ID JPN (SALINC_ID_TBL_JPN) and Define Salary Increase Matrix JPN (SALARY_MATRIX_JPN) components.

This section provides an overview of the update salaries by percentage process and discusses how to update salaries by percentage.

Pages Used to Update Salaries by Percentage

Page Name	Definition Name	Usage
Define Salary Increase ID Page	SALINC_ID_TBL_JPN	Define a salary increase ID and associate a rate code, which must be of class *DFRPAY* and of type *Flat Amount,* and worker groups with it. You run the salary increase simulation by salary increase ID.
Define Salary Increase Matrix Page	SALARY_MATRIX_JPN	Establish the fixed percentage increase for each review rating by quartile. The fields on this page are identical to those on the Define Salary Increase Matrix Table page.
Generate Salary Increase Data Page	RUN_CMPCALC_JPN	Enter the parameters for running the salary increase process and populating the Salary Increase Simulation table.
Simulate Salary Increase Page	SALINC_SIML_JPN	View the results of running the simulation process. All fields in the results grid are display-only, except for the **Adjustment Amount** field on the Changes tab, in which you can adjust the amount of an individual's salary increase.
Salary Simulation Report Page	RUN_SALREPORT_JPN	Run the Salary Simulation report (CMP020JP) that displays the results of the Salary Increase Simulation process.
Load Salary Percent Increase Page	RUN_UP_SALINC_JPN	Update worker job compensation records with the results of the salary increase and adjustment results.

Related Links
Understanding Updating Salaries for Japan

Understanding the Update Salaries by Percentage Process

To use the updating salaries by percentages method, which includes a simulation process that shows the effects of various increase options, you set up two tables: the Salary Increase ID table and the Salary Increase Matrix table. In the Salary Increase ID table, you specify a single compensation rate code, which must be of class *Defined Range Pay (DFRPAY)* and of type *Flat Amount.* You then run the simulation process, which, like other methods, uses review results in its calculation. You can adjust the result of the simulation for workers, by increasing or decreasing it, and view the overall results—the totals—online. When you are satisfied with the results, you run a second process, similar to the processes that conclude the other methods, to load the salary increase amounts to the workers' job compensation records.

Note: To use this salary increase method, select the **Defined Range** check box on the Calculation Rule Settings JPN page.

You complete these steps to update salaries by percentage:

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1. Define a Japanese salary increase ID.

2. Set up a Japanese salary increase matrix.

3. Run the Run Salary Inc Table process.

4. Run the salary increase simulation and adjust as required.

5. Run the load salary percent increase process.

Define Salary Increase ID Page

Use the Define Salary Increase ID page (SALINC_ID_TBL_JPN) to define a salary increase ID and associate a rate code, which must be of class DFRPAY and of type Flat Amount, and worker groups with it.

You run the salary increase simulation by salary increase ID.

Navigation:

Compensation > **Base Compensation** > **Percentage Increase JPN** > **Define Salary Increase ID** > **Define Salary Increase ID**

This example illustrates the fields and controls on the Define Salary Increase ID page.

Field or Control	Description
Calculation As Of Date	Enter the effective date that the system uses to determine from which job compensation record it should get the worker's current data to calculate new data. For example, if the worker's review band earns a worker a 6 percent increase, the system must get the existing rate code amount to calculate the new rate code amount.
Salary Increase Date	Enter the effective date of the new job record that the system inserts for the worker for the review-based increased amount. The action and reason are *Pay Rate Change* and *Salary Increase by Percentage.*

Field or Control	Description
Comp Rate Code (compensation rate code)	Enter the rate code. It must be of the class *Defined Range Pay (DFRPAY)* and of the type *Flat Amount.*
	You can add only one compensation rate code for each salary increase ID, and only one salary increase ID is associated with each simulation run. To run a simulation for a different compensation rate code, you must define additional salary increase IDs.
	Note: You cannot have more than one rate code of class *DFRPAY* on a single worker's Job Data - Compensation record.
	The process that populates the Salary Increase Simulation table includes all workers in the groups that you specify who have this compensation rate code as well as the currency code and frequency set in the Compensation Rate Code table for this rate code.
	If you have changed the default currency code or frequency from that set on the compensation rate table in the workers' job compensation record, then those workers go into error and are not included in the simulation.
Apply Rounding At	Select the numerical "place" at which to apply the rounding rule you select.
Rounding Rule	Select the rounding rule for the simulation process based on this salary increase ID. Options are: • *Round* • *Round Down* • *Round Up*
Group ID	Enter the group IDs for the workers being included in this process. You must enter at least one group ID to complete this process. If a worker in a group that you specify does not have the compensation rate code that you specified for processing, the system skips the worker without processing.

Note: This salary update method retrieves the required percentage increase from the salary matrix table where you linked review bands to percentage increases, quartile by quartile.

Generate Salary Increase Data Page

Use the Generate Salary Increase Data page (RUN_CMPCALC_JPN) to enter the parameters for running the salary increase process and populating the Salary Increase Simulation table.

Navigation:

Compensation > Base Compensation > Percentage Increase JPN > Generate Salary Increase Data > Generate Salary Increase Data

This example illustrates the fields and controls on the Generate Salary Increase Data page.

Field or Control	Description
Salary Increase ID	Enter the salary increase ID for which to run the simulation.
Calculation Number	Enter the number that identifies a particular simulation in a series that you might run for comparison purposes.
Select All Groups	Select to have the system populate the **Group ID** group box with all groups that you originally associated with this salary increase ID.
Group ID	If you do not want to run the simulation for all the groups that you associated with this salary increase ID, deselect the **Select All Groups** check box and enter only those groups to process.

Note: This process includes only workers with the single compensation rate code that is associated with the salary increase ID, but only if their currency code and frequency are the same as the compensation rate code default.
If you try to run a simulation with a combination of salary increase ID, calculation number, and group ID for which results exist, you get a warning. If you proceed, the results of the previous simulation are overwritten. To add groups to or remove them from an existing simulation and maintain the results of the previous simulation, change the calculation number.

Simulate Salary Increase Page

Use the Simulate Salary Increase page (SALINC_SIML_JPN) to view the results of running the simulation process.

All fields in the results grid are display-only, except for the Adjustment Amount field on the Changes tab, in which you can adjust the amount of an individual's salary increase.

Navigation:

Compensation > **Base Compensation** > **Percentage Increase JPN** > **Simulate Salary Increase** > **Simulate Salary Increase**

Field or Control	*Description*
Name and **EmplID** (employee ID)	Enter this information for a single worker if you are viewing and possibly adjusting simulation results for one person.
Search Result Message	Displays the range showing on the page and the total of the search results.

Sort Group By

Field or Control	*Description*
EmplID (employee ID) and **Name**	Select to have the grid display simulation results by worker ID or worker name, respectively.

Simulation Statistics

The (bracketed) number for each **Total** field is used in the field description to identify where the derived results come from. The Amounts and Adjustments tabs indicate on which page the column appears.

Field or Control	*Description*
Total Current Amount (1)	The total of the Amount Before Salary Increase column (Amounts).
Total Adjusted Amount (2)	The total of the Adjustment Amount column (Adjustments).
Average Percent Increase (3)	The average of the Salary Increase Percent column (Amounts) (or 5/1).
Adjusted Average Percent (4)	The average of the Adjusted Sal Inc Percent column (Adjustments) (or 6/1).

Field or Control	Description
Total Calculation Incr Amount (total calculation increase amount) (5)	The total of the Amount of Salary Increase column (Amounts) (or 1 × 3).
Total Actual Increase Amount (6)	The Total Calculation Incr (increase) Amount plus Total Adjustment Amount (or 5 + 2).
Total Calculation New Amount (7)	The total of the New Salary Amount column (Adjustments) (or 1 + 5).
Total Actual New Amount (8)	The total of the Adjusted Salary Amount column (Adjustments) (or 7 + 2).

Note: Column order for grids may vary by implementation. All columns may not be visible. Use the horizontal scroll bar for the page to view all available columns.

Salary Details Tab

Field or Control	Description
EmplID (employee ID)	The system displays the IDs of all the workers in the group that you entered to access this page. You can have the display sorted by this first column. The worker ID is repeated on all the pages of this component.
Name	The system displays the names of all the workers in the group that you entered to access this page. You can sort the display by this column.
Empl Rcd Nbr (employment record number)	The system displays each employment record number if it is not *0.* Blank equals record number *0,* which means that the worker has only one employment record.
Comp Rate Code (compensation rate code)	The compensation rate code associated with this salary increase ID.
Compensation Eff Sequence (compensation effective sequence)	The system displays the compensation effective sequence that comes from the worker's compensation record in the Job record.

Amounts Tab

Field or Control	Description
Amount Before Salary Increase	The worker's salary before the simulation was run.
Review Band	The system displays the review band that the worker's review results indicate. The salary increases come from the increase percentages that you linked to review bands in the Salary Increase Matrix table.
Salary Increase Percent	The increase in salary, expressed as a percentage of the Amount Before Salary Increase.
Amount of Salary Increase	The amount by which the Amount Before Salary Increase is increased as a result of running the salary increase process.

Adjustments Tab

Field or Control	Description
New Salary Amount	The system displays the amount of the salary after the simulated increase: the Amount Before Salary Increase (Amounts) plus the Amount of Salary Increase.
Adjustment Amount	The only field available for entry in the otherwise display-only grid. Manually adjust the New Salary Amount by adding or subtracting an adjustment amount. **Note:** If you change the value in this field, save before you move to the next set of records using the navigation buttons below the calculation number. If you do not save, you receive a warning that your changes will not be stored.
Adjusted Salary Amount	The system updates this field online according to any adjustments that you make. This value is the new salary amount after adjustment or the New Salary Amount plus or minus the Adjustment Amount.
Adjusted Sal Inc Percent (adjusted salary increase percentage)	The system updates this field according to any adjustments that you make. This value is the salary increase percentage after adjustment, calculated by: (Adjusted Salary Amount / Amount Before Salary Increase − 1) × 100.

Salary Simulation Report Page

Use the Salary Simulation Report page (RUN_SALREPORT_JPN) to run the Salary Simulation report (CMP020JP) that displays the results of the Salary Increase Simulation process.

Navigation:

Compensation > **Base Compensation** > **Percentage Increase JPN** > **Salary Simulation Report** > **Salary Simulation Report**

This example illustrates the fields and controls on the Salary Simulation Report page.

Field or Control	Description
Salary Increase ID	Enter the salary increase ID you ran the simulation for and for which you want the results reported.
Calculation Number	Enter the calculation number of the particular simulation you want reported.
Select All Groups	Select this check box if you want the system to populate the Group ID section with all the groups you originally associated with the **Salary Increase ID.**
Group ID	If you do not want to run the simulation for all the groups that you associated with this salary increase ID for this calculation number, deselect the **Select All Groups** check box and enter only groups that you want to process.

Load Salary Percent Increase Page

Use the Load Salary Percent Increase page (RUN_UP_SALINC_JPN) to update worker job compensation records with the results of the salary increase and adjustment results.

Navigation:

Compensation > **Base Compensation** > **Percentage Increase JPN** > **Load Salary Percent Increase** > **Load Salary Percent Increase**

This example illustrates the fields and controls on the Load Salary Percent Increase page.

Field or Control	Description
Salary Increase ID	Enter the salary increase ID for which you ran the simulation and for which the results are to be loaded to worker job compensation records.
Calculation Number	Enter the calculation number of the particular simulation results to be loaded.
Select All Groups	Select to have the system populate the Group ID section with all the groups that you originally associated with this salary increase ID and calculation number combination.
Group ID	If you do not want to run the simulation for all the groups that you associated with this salary increase ID for this calculation number, deselect the **Select All Groups** check box and enter only groups that you want processed.

Chapter 10

(FRA) Forecasting Salaries for France

Understanding Salary Forecasting

Use Salary Forecasting, a French-specific business process, as an analysis tool or as a forecasting tool. Either analyze the changes in compensation for a group of workers in past periods or simulate how hypothetical events occurring in the future will affect compensation. Because you can see how various events affect your compensation package, this business process is useful for human resources managers or executives wanting to build compensation budgets.

Salary Forecasting is compliant with the rules of the French Analysis Method for compensation variations, called La Masse Salariale. The analysis method that the business process employs enables you to calculate independently the effects of any compensation decisions for a group of workers for a future time period. The reports provided are also in accordance with La Masse Salariale.

The steps for using the Salary Forecasting business process are:

1. Set up your data.

2. Run the calculations.

3. Run and view the reports.

Related Links
"PeopleSoft HCM Reports: Selected Reports" (Application Fundamentals)

Setting Up Salary Forecasting

If you use the Salary Forecasting business process for forecasting purposes, then set up events for modeling the future compensation.

If you use the business process for comparison of two past periods, then do not set up any events. Note that the calculation process ignores events defined in past periods.

Complete these steps to set up salary forecasting:

1. Define, one at a time, two like periods of time.

   These time periods can be past, current, or future. Usually, you compare two equivalent periods of time, referred to as the *reference* and the *analysis* periods.

2. Associate the periods for comparison or forecasting.

3. Define groups, if they are not already created.

Define worker groups using the Group Build module. Each person defined in a group used in the Salary Forecasting business process must have, in his or her compensation package, rate codes attached to a rate code class. Use the rate codes without rate code class report to verify.

4. Define the various events that you want to apply to the worker groups whose compensation you want to analyze and forecast.

   The events can be of various types, as described in the next section. You might also define additional setup data such as proration rules or specific hours rate.

5. Ensure all events for one scenario have the same elementary period.

6. (Optional) Define your proration rules.

7. (Optional) Define your rates for hours worked.

8. Group events into a scenario.

   At the scenario level, define a set of events to apply to groups of workers for a given time period.

Related Links
Understanding Technical Details

Understanding Technical Details

This section discusses technical details for:

- Compensation effects.

- Categorization of events.

Technical Details: Compensation Effects

The following topics describe the effects in La Masse Salariale method of analysis.

Level Effect

Any compensation measure that increases the level of compensation as of a certain date has a level effect. Any compensation increase of the elements of base pay has a level effect.

Mass Effect

Any compensation increase, either an increase in base compensation or any type of variable compensation, has a mass effect. It affects the average compensation for the period and population being considered.

Considering any given period of time and any compensation measure that has a level effect, the sooner in the period the measure is applied, the greater the mass effect for that measure.

Carry Over Effect

The carry over effect represents the effect on a given period of all the measures taken during the previous period. For any compensation measure that has a level effect, the later this measure is applied in a given time period, the bigger the carry over effect on the next time period.

Average Compensation for Employees in Place

The overall compensation for an organization could change between two consecutive periods for several reasons:

- Compensation increases given to a subgroup or to the entire organization.

- Seniority changes due to the overall aging of the population.

- Hires and departures within the organization.

- Moves within the organization that trigger changes in compensation, such as promotions.

Average compensation for employees in place (ACEP) is the average compensation for the subset of people within the organization during two consecutive time periods.

Headcount Effect

The headcount effect is the variance of the headcount multiplied by the variance of the average compensation.

Structure Effect

The structure effect is the variance in the overall compensation due to internal moves within the organization.

Noria Effect

The Noria effect is defined as the consequence of changes in compensation due to hiring and departures. Often, the salaries of the newly hired are below those of workers who have been at the same job longer. The Noria effect tracks the differences.

Overall Variance of Compensation Between Two Time Periods

The calculation is as follows:

```
ACEP variance + Headcount effect + Structure Effect + Noria Effect
```

All variances and effects are expressed in percentages (refer to Report LMS001).

Technical Details: Categorization of Events

All events are classified in predefined categories by the Forecast Compensation module calculation process. Those categories are the ones commonly used for La Masse Salariale analysis. The category codes and descriptions are delivered as system data.

This table displays La Masse Salariale categorization and the corresponding category codes that are used by the calculation process to map the events defined at the scenario level with the categories:

Category	Category Code
General Increases	C20
General Increases given as a percentage	C21
General Increases given as a Amount or Points changes	C22
Measures by Category	C30
Bonus	C40
Regular Bonus	C41
Exceptional Bonus	C42
Individual Measures	C50
Seniority	C51
Shift-Technicality	C52
Activity	C53

The following matrix displays which events affect which categories.

Event	Category/ Rate Code Class	C 20	C 21	C 22	C 30	C 40	C 41
Leave		N/A	N/A	N/A	N/A	N/A	N/A
Promotion	Base Pay						
	Reg Bonus					*	*
	Seniority Bonus						
Salary Increase	Base Pay	*	*	*	*		
	Reg Bonus					*	*
	Seniority Bonus						

Event	*Category/ Rate Code Class*	*C 20*	*C 21*	*C 22*	*C 30*	*C 40*	*C 41*
Seniority	Seniority Bonus						
Working Schedule	Base Pay						
	Reg Bonus					*	*
	Seniority Bonus						
Entry		N/A	N/A	N/A	N/A	N/A	N/A
Incentive	N/A					*	

Event	*Category/ Rate Code Class*	*C 42*	*C 50*	*C 51*	*C 52*	*C 53*
Leave		N/A	N/A	N/A	N/A	N/A
Promotion	Base Pay		*		*	
	Reg Bonus					
	Seniority Bonus		*	*		
Salary Increase	Base Pay		*		*	
	Reg Bonus					
	Seniority Bonus		*	*		
Seniority	Seniority Bonus		*	*		
Working Schedule	Base Pay		*			*
	Reg Bonus					
	Seniority Bonus		*	*		

Event	Category/ Rate Code Class	C 42	C 50	C 51	C 52	C 53
Entry		N/A	N/A	N/A	N/A	N/A
Incentive	N/A	*				

Common Elements Used in Salary Forecasting

Field or Control	Description
Period Types	Four period types define the periods of comparison: • Month • Quarter • Semester (six months) • Year
Periods or Periods of Comparison	Periods, or periods of comparison, are the periods being compared. Use salary forecasting in two ways: to analyze two past periods or to forecast a future period, using the current period as a base.
Reference Period	For forecasting, this period is likely to contain the current date. For comparing past periods, use any period as a basis for comparison.
Analysis Period	For forecasting, this is a future period contiguous with the reference period. For comparing past periods, this period must be contiguous with and prior to the reference period.
Type of Elementary Period	How often the module processes its calculations. These elementary period types coincide with your possible payroll dates: • Monthly • Semi-monthly (more accurate but takes more processing time) Suppose that you select Year as the period type and semi-monthly as the elementary period type. The module makes 24 calculations. If you select Monthly as the elementary period type, the module makes 12 calculations. Select the elementary period type when you define events.

Field or Control	Description
Elementary Periods	The monthly or semi-monthly segments of a comparison period. Whether the segments are monthly or semi-monthly is determined by the selected elementary period type. • Past Elementary Period: any elementary period that is prior to and does not contain the current date (date of processing). • Current Elementary Period: The elementary period that contains the current date (date of processing). • Future Elementary Period: any elementary period that has its start date greater than the current date. The process manages the current elementary period exactly the same way it manages any past elementary period. The process manages future elementary periods by copying the data calculated for the current elementary period.
Triggering Period	The date the event is to occur (or trigger) within the analysis period.
Working Periods	The two periods (always one analysis and one reference) that you associate for either comparing or forecasting. They are defined by a Working Period ID. These rules apply to the two periods associated as working periods: • The two periods must have the same period type. • The two periods must be contiguous, for example, 1994 and 1995, this year and next year, this month and next month. • No time periods can overlap. When using the Salary Forecasting module to analyze the future, use the present as the reference period. This rule is true for all period types: analyze this year against next year, this month against next month, and so on.
Working Periods ID	A value that must be the same for all events in a scenario.
Event ID	Identifies a compensation event in the system. You enter one for each event that you define.
Event Type	Select one of the following: *Headcount Increase, Headcount Decrease, Compensation Increase, Promotion, Seniority Increase, Incentives,* and *Working Schedule.*

Defining Periods

To set up periods, use the Period Setup panel (LMS_PERIOD_PNLGP_GBL) and Working period setup panel (LMS_WRK_PD_PNLGP_GBL) components.

This section discusses how to associate contiguous working periods.

Pages Used to Define Periods

Page Name	Definition Name	Usage
Period Setup panel Page	LMS_PERIOD_DEFN	Define the time periods to compare and analyze compensation. Each time period is a Time Period ID.
Working Periods Page	LMS_WRK_PD_DEFN	Associate two contiguous time periods. If you analyze two past periods, do not include the current period. If you forecast for the future, the reference period is the current period.

Working Periods Page

Use the Working Periods page (LMS_WRK_PD_DEFN) to associate two contiguous time periods.

If you analyze two past periods, do not include the current period. If you forecast for the future, the reference period is the current period.

Navigation:

Set Up HCM > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Working period setup panel** > **Working Periods**

This example illustrates the fields and controls on the Working Periods page.

Field or Control	Description
Reference Period	For forecasting, select the current period—Month, Quarter, Semester or Year—depending on what period type you selected on the Period Setup panel page. For comparing past periods, select any past period.
Analysis Period	For forecasting, this value must be a future period contiguous with the reference period, and of the proper length for the period type. For comparing past periods, select any past period contiguous with the reference period. The system ensures that the reference and analysis periods do not overlap, that they are contiguous, and that they are of the same type.

Setting Up Events

To set up events, use the Headcount increase setup panel (LMS_ENTRIES_EVENT_GBL), Incentive event setup panel (LMS_INCENT_EVENT_GBL), Salary Increase event setup (LMS_INCREASE_EVENT_GBL), Headcount decrease event setup (LMS_LEAVES_EVENT_GBL), Promotion event setup panel (LMS_PROMO_EVENT_GBL), Seniority Setup panel (LMS_SENIOR_EVENT_GBL), Working Schedule event setup (LMS_SCHEDULE_EVENT_GBL), Proration setup panel (LMS_PRORATION_GBL), and Hours rate setup panel (LMS_HOURS_RATE_GBL) components.

This section discusses how to set up events.

Understanding Events

An event is an action (or a set of actions) applied to a group of workers. Events are the building blocks of your scenarios. You define and reuse events in many scenarios as long as the scenarios apply to the same set of time periods. Use delivered events to:

*   Simulate a headcount increase.

    Add workers to any group (by job code or position) to simulate hiring or to study the effects of proposed organizational changes.

*   Simulate future awards.

    This simulation enables you to see the effect of awarding a lump sum amount at a specific point in time. The incentive event is simplistic here because the Variable Compensation module offers a more complex simulation. The Variable Compensation module enables you to perform different scenarios to determine the maximum, target, and minimum awards for a group of workers based on a given plan of specific business rules.

*   Simulate a compensation increase event.

*   Simulate a headcount decrease.

*   Simulate a promotion.

    A promotion is defined as a move from one Job Code to another Job Code.

*   Simulate seniority.

    This simulation shows the effect of seniority increases.

*   Define a working schedule.

    A working schedules event determines the effect of changing the working schedule for a group of workers.

*   Define proration rules.

*   Define hours rates.

Pages Used to Set Up Events

Page Name	Definition Name	Usage
Headcount increase setup panel or Headcount Increases Page	LMS_ENTRIES	Define a Headcount Increase event.

Page Name	Definition Name	Usage
Additional Simulation Parameters Page	LMS_ENTRIES_SEC	Define additional parameters if the selected job code or position has compensation packages containing pay components expressed either in points or in a weekly frequency. Define the standard hours per standard work period or the points value and currency required by the calculation process for correctly handling the conversion of those pay components.
Incentive event setup panel or Incentives Page	LMS_INCENTIVES	Set up a future award for a group.
Salary Increase event setup or Compensation Increases Page	LMS_INCREASE	Define a compensation increase event.
Headcount decrease event setup or Headcount Decreases Page	LMS_LEAVES	Define a headcount decrease event.
Promotion event setup panel or Promotions Page	LMS_PROMOTION	Simulate promotions for all people in a group.
Seniority Setup panel or Seniority Page	LMS_SENIORITY	Define a seniority event.
Working Schedule Page	LMS_WRK_SCHEDULE	Define work weeks for the calculations.
Proration setup panel Page	LMS_PRORATION	Define the proration schemes.
Hours rate setup panel Page	LMS_HOURS_RATE	Define the overtime rates used for simulating the working schedules event. Use this page only for the Salary Forecasting calculation process.

Related Links

"Variable Compensation Plans" (PeopleSoft Human Resources Manage Variable Compensation)

Headcount increase setup panel or Headcount Increases Page

Use the Headcount increase setup panel or Headcount Increases page (LMS_ENTRIES) to define a Headcount Increase event.

Navigation:

- **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Headcount increase setup panel** > **Headcount Increases**

- **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Headcount Increases**

Field or Control	Description
Headcount Increase Type	Select how you want the calculations to consider the increase: **Avg Amnt** (average amount): When you select **Avg Amnt,** these fields appear: **Average Amount, Currency, Frequency.** Enter a free compensation amount, which is multiplied by the number of people selected. Use this type of headcount increase to perform an estimated simulation. **JobCode:** Select this option and the **SetID** and **Forecasted Job** fields appear. Use this option to add many people with the same job code. The calculation uses the compensation package defined for the specified job code and multiplies it by the number of people selected for the simulation. --- **Note:** Only those job codes that are *not* associated with a matrix are available. --- **Position:** Select this option and the **Forecasted Positions** field appears. The calculation uses the compensation package defined for the job code associated with the specified position and multiplies it by the number of people selected for the simulation.
Structure Effect	Refer to the Understanding Technical Details topic for the definition of the structure effect. To measure the structure effect, assign your headcount increase to a group. See Understanding Technical Details.
Number of People	Enter the number that represents the headcount increase.
Simulation Parameters	Click to enter additional simulation parameters for the calculation process.
Average Amount	When **Headcount Increase Type** is **Avg Amnt,** specify the average amount of the salaries for all people added, based on the frequency specified. For example, five new people get 5000.00 EUR (1000.00 EUR each) every other week, so the frequency is bi-weekly. You would enter *1000* in the **Avg Amnt** field.
Currency	When **Headcount Increase Type** is **Avg Amnt,** select the currency that the calculation process uses.

Field or Control	Description
Frequency	When **Headcount Increase Type** is **Avg Amnt,** specify how often the new people are to be paid. During the calculation process, the frequency is converted to match the elementary period type. For example, the elementary period type is monthly, and you enter five new people who get 1000.00 EUR weekly. The system calculates 5000.00 EUR weekly, and then converts it to a monthly frequency using the frequency annualization factor. The monthly figure is 20000.00 EUR. The calculation process adds 20000.00 EUR every month, starting with the triggering period defined for this event. Frequency values come from the Frequency table.
SetID	When **Headcount Increase Type** is **JobCode,** specify the setID for the job code for the new hires. These values come from the SetID table.
Forecasted Job	When **Headcount Increase Type** is **JobCode,** specify a forecasted job for the new hires. Each job code must have its own event. These values come from the Job Code table.
Forecasted Positions	When **Headcount Increase Type** is **Position,** specify a forecasted position for the new hires.

Incentive event setup panel or Incentives Page

Use the Incentive event setup panel or Incentives page (LMS_INCENTIVES) to set up a future award for a group.

Navigation:

- **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Incentive event setup panel** > **Incentive event setup panel**

- **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Incentives** > **Incentives**

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

Field or Control	Description
Number of People	Enter the number of people who receive a lump sum incentive award.
Average Amount	Enter the average amount each person is to receive. For example, if you select *5* for the number of people and *500* for the average amount, the calculation adds 5 times 500.00 EUR, or 2500.00 EUR, to the triggering period.
Structure Effect	Enter the Group ID to receive this award. Refer to the Understanding Technical Details topic for information about the structure effect. See Understanding Technical Details.

Salary Increase event setup or Compensation Increases Page

Use the Salary Increase event setup or Compensation Increases page (LMS_INCREASE) to define a compensation increase event.

Navigation:

- **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Salary Increase event setup** > **Salary Increase event setup**

- **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Compensation Increases** > **Compensation Increases**

This example illustrates the fields and controls on the Compensation Increases page.

Field or Control	Description
Individual Measure	Select if the increase is an individual measure. This check box relates to La Masse Salariale method of analysis. It classifies compensation increases into three categories: general increases (applies to the overall simulated population); increases by category (a category being a subset of the overall simulated population); and individual measure (the compensation increase is an increase for an individual). To simulate general increases, deselect this check box. See Understanding Salary Plans.
Compensation Increase Rate Codes	Define the rate codes to be increased. All people in a group with a compensation package containing specified compensation rate codes receive the increase that is specified on this page as of the triggering period of this event. Select the way to change a person's compensation for a given rate code from these choices: Percent Amount, Change Amount, Change Percent, Change Points, Percent of Points, Currency, and Rate Code Class. Specify any components of pay and any increases. Depending on the component type, fill in the fields as follows. (Fields not related to certain component types are unavailable for selection.) If the component type is flat amount or hourly, enter either a Percent Amount or a Change Amount. If the component type is percentage, enter only a Change Percent. If the component type is points, enter either a Percent of Points or a Change Points.

Headcount decrease event setup or Headcount Decreases Page

Use the Headcount decrease event setup or Headcount Decreases page (LMS_LEAVES) to define a headcount decrease event.

Navigation:

• **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Headcount decrease event setup** > **Headcount decrease event setup**

• **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Headcount Decreases** > **Headcount Decreases**

This example illustrates the fields and controls on the Headcount decrease event setup page.

Field or Control	Description
Description	Enter a description of the headcount decrease event. Specify the group to which this event applies on the Scenario Definition page. For example, if five workers retire as of the date specified by the triggering period, create a group that includes those five workers. At the scenario level, attach this group to the headcount decrease event.

Promotion event setup panel or Promotions Page

Use the Promotion event setup panel or Promotions page (LMS_PROMOTION) to simulate promotions for all people in a group.

Navigation:

• **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Promotion event setup panel** > **Promotions**

• **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Promotions**

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

Field or Control	Description
From	Enter values in the **SetID** and **Job Code** fields for a group's current position.
To	Enter values in the **SetID** and **Job Code** fields for a group's promoted position.

Working Schedule Page

Use the Working Schedule page (LMS_WRK_SCHEDULE) to define work weeks for the calculations.

Navigation:

- **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Working Schedule event setup** > **Working Schedule**

- **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Working Schedules** > **Working Schedule**

This example illustrates the fields and controls on the Working Schedule page.

Field or Control	Description
Standard Hours	Enter the number of standard hours per frequency period. For example, 35 hours is standard hours for a weekly frequency. To simulate the effect of a group of people moving from 39 to 35 hours, enter the target frequency (35 hours a week) in this field. The group of people that will change its working schedule is defined at the scenario level.
Frequency	Enter the frequency of the standard hours that you select.

Proration setup panel Page

Use the Proration setup panel page (LMS_PRORATION) to define the proration schemes.

Navigation:

Set Up HCM > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Proration setup panel** > **Proration setup panel**

This example illustrates the fields and controls on the Proration setup panel page.

Field or Control	Description
Time Period ID	The system displays the Time Period ID that you entered.
Period Type	The system displays a period type of either *Monthly* or *Semi-Monthly*.
Type of Elementary Period	Depending on the combination of period type and type of elementary period that you selected, the system displays fields that enable you to rate how to pay per elementary period.
12 Months	Select to weigh each month equally.
13 Months	Select to weigh one month out of a year twice.
14 Months	Select to weigh one month out of a year three times.
15 Months	Select to weigh one month out of a year four times. The system calculates all the ratios, but you can modify them. For instance, if you select 13 Months, you could weight December twice (default calculation) or half-weight June and December. In this case, you would overwrite the default ratios.

Hours rate setup panel Page

Use the Hours rate setup panel page (LMS_HOURS_RATE) to define the overtime rates used for simulating the working schedules event.

Use this page only for the Salary Forecasting calculation process.

Navigation:

Set Up HCM > Product Related > Compensation > Forecast Compensation FRA > Hours rate setup panel > Hours rate setup panel

This example illustrates the fields and controls on the Hours rate setup panel page.

Field or Control	Description
Hours Rate Effective Date	Enter the date these rates are effective.
Sequence	These numbers represent the sequence of counting hours. They are automatically generated.
From and **To**	Enter the first and last number in the range of hours. The first sequence must begin with *0*.
Frequency	Enter the valid frequency for this range of hours.
Rate (%)	Enter the percentage rate for each sequence.

Defining Scenarios

To define scenarios, use the Scenario setup panel (LMS_SCENARIO_GBL) component.

This section discusses how to define scenarios.

Pages Used to Define Scenarios

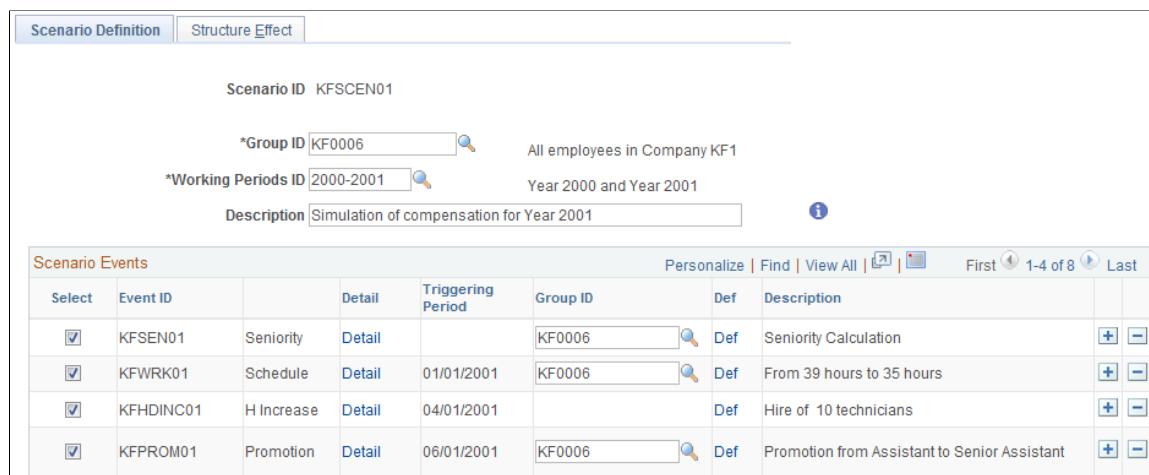| Page Name	Definition Name	Usage
Scenario Definition Page	LMS_SCENARIO	Define scenarios. You associate a working periods ID with a group and a set of events.
Structure Effect Page	LMS_SCENAR_CTG	Define the groups used to assess the structure effect.

Scenario Definition Page

Use the Scenario Definition page (LMS_SCENARIO) to define scenarios.

You associate a working periods ID with a group and a set of events.

Navigation:

- **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Scenario setup panel** > **Scenario Definition**

- **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Scenarios** > **Scenario Definition**

This example illustrates the fields and controls on the Scenario Definition page.

Field or Control	Description
Group ID	Enter a value for this scenario. The group could be your whole organization. For calculation performance reasons, create a smaller group that represents your organization in compensation terms or create a group from a certain department.

Field or Control	Description
Working Periods ID	When you select a working periods ID and press **TAB** to move out of the field, the system displays all events applicable for that working periods ID. For certain events, you can limit the population for the event by selecting a Group ID. Note that Scenario *KFSCEN01* applies to all the workers in Group ID *KF0006*.
Scenario Events	All the events defined for this working period ID appear. Each event is listed by Event ID, Triggering Period, and Description. To include the events in calculations, select the corresponding check box. Click the **Detail** link to go to the Event Definition page to make adjustments to an event. Click the **Def** link to go to the Group Definition page and modify a group. Use the **Group ID** fields to restrict an event to a subset of the group that is defined in the previous **Group ID** field. Restrict the population for the following types of events: headcount decrease, promotion, seniority, working schedule. The headcount increase and incentives events do not need a subgroup.

Note: For a compensation increase event, the population to consider is all the workers from the main group (the one defined in the **Group ID** field at the scenario level) who have, in their compensation package, the compensation rate codes defined in the event.

Structure Effect Page

Use the Structure Effect page (LMS_SCENAR_CTG) to define the groups used to assess the structure effect.

Navigation:

*   **Set Up HCM** > **Product Related** > **Compensation** > **Forecast Compensation FRA** > **Scenario setup panel** > **Structure Effect**

*   **Compensation** > **Forecast Compensation FRA** > **Define Forecast Data** > **Scenarios** > **Structure Effect**

This example illustrates the fields and controls on the Structure Effect page.

Field or Control	Description
Scenario Structure Effect Groups	Define a subgroup of your overall population, which you defined in the first **Group ID** field on the Scenario Definition page. Enter groups forming a subset of your overall population. Ensure that the groups do not overlap and that the sum of their populations exactly equals the overall population. For example, organization ABC has several categories of workers: executives, managers, and workers. You want to study how the compensation is changing due to the movement of people from one category to another. The Salary Forecasting module calculates it automatically: Define your overall organization as being all workers in ABC. Then, define three groups to enter on the Scenario Structure Effect page: Group 1 is all executives from ABC, Group 2 is all managers from ABC, and Group 3 is all workers from ABC. Groups 1, 2, 3 do not overlap, and their sum equals the overall population of organization ABC.

Related Links

Technical Details: Compensation Effects

Forecasting Compensation

This section provides an overview of compensation forecasting and discusses how to forecast compensation.

Pages Used to Forecast Compensation

Page Name	Definition Name	Usage
Forecast Compensation Page	LMS_RUN_CNTL_PNL	Initiate compensation forecasting based on specified criteria.
Forecasted Compensation Rpt Page	RUNCTL_LMS_REPORT	Report on compensation scenarios.
Scenario Comparison Rpt Page	RUNCTL_LMS_REPORT	Define forecasted compensation and compare scenarios.
Rate Codes w/out Class Rpt Page (Rate Codes without Class Report Page)	RUNCTL_LMS_RATE_CL	Report on rate codes that do not have a rate code class attached to them.

Understanding Compensation Forecasting

The calculation process divides both the reference period and the analysis period into sections by considering the elementary period type. For each elementary period, the process extracts from the HR database the base compensation (from the PS_COMPENSATION table) and the variable compensation (from PS_VC_AWARDS) for all the workers in the group specified at the scenario level. It also calculates the average headcount and full-time equivalents (FTEs) for each elementary period to create average compensation amounts.

This calculation process considers all the events defined for future elementary periods and calculates forecasted compensation. Any event defined for past or current elementary periods is not considered because data exists for those periods of time in the HR database.

The forecasted compensation amounts are stored in salary forecasting tables so that you can compare the results of several scenarios. Remember that the salary forecasting process does not update core HR transaction tables.

Forecast Compensation Page

Use the Forecast Compensation page (LMS_RUN_CNTL_PNL) to initiate compensation forecasting based on specified criteria.

Navigation:

Compensation > **Forecast Compensation FRA** > **Process Forecast** > **Forecast Compensation** > **Forecast Compensation**

This example illustrates the fields and controls on the Forecast Compensation page.

Field or Control	Description
Scenario ID	Select a scenario ID.
Rate Type	Select a compensation rate type.
Scenario Definition	Click to go to the Scenario Definition page of the selected scenario ID.
Fixed Exchange Rate	Select if this currency has a fixed exchange rate.
Re-Extraction	Select if this process is re-extracting the base compensation from the Human Resource database.
Carry-Over Factor	The carry over effect represents the impact on a given period of all the measures taken during the previous period. Indicate what will be carried over to the next period.
Structure Effect	Select if the variance in the overall compensation is due to internal moves within the organization.

Forecasted Compensation Rpt Page

Use the Forecasted Compensation Rpt page (RUNCTL_LMS_REPORT) to report on compensation scenarios.

Navigation:

Compensation > **Forecast Compensation FRA** > **Process Forecast** > **Forecasted Compensation Rpt** > **Forecasted Compensation Rpt**

This example illustrates the fields and controls on the Forecasted Compensation Rpt page.

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

Related Links

Technical Details: Compensation Effects

Scenario Comparison Rpt Page

Use the Scenario Comparison Rpt page (RUNCTL_LMS_REPORT) to define forecasted compensation and compare scenarios.

Navigation:

Compensation > **Forecast Compensation FRA** > **Process Forecast** > **Scenario Comparison Rpt** > **Scenario Comparison Rpt**

This example illustrates the fields and controls on the Scenario Comparison Rpt page.

Field or Control	Description
Scenario Filter	This group box enables you to narrow the choice of scenarios to report by User ID and Run Control ID.

Field or Control	Description
⚡ **Refresh**	Click the **Refresh** icon to display scenarios that meet the scenario filter requirements.
Scenario History Report	This group box displays all scenarios that meet the scenario filter requirements. Scenarios are listed by Scenario ID, Scenario Run Date Time, User ID, Run Control ID, and Description. To run one scenario at a time, select its check box.

Purging Scenario History

All the results from of the calculation of any scenario are stored in the database. Define several scenarios with different sets of events, run the calculation for all scenarios, and compare the results. Then, select the scenario that best mirrors your compensation policy. You may then purge from the database the results of some scenario calculations you are not going to use. When you purge scenario history, the calculation results are purged but not the scenario definition.

Page Used to Purge Scenario History

Page Name	Definition Name	Usage
Purge Scenario History Page	RUNCTL_LMS_PURGE	Run the HR_LMSPURGE Application Engine process to delete the results of all the selected scenario calculation runs.

Purge Scenario History Page

Use the Purge Scenario History page (RUNCTL_LMS_PURGE) to run the HR_LMSPURGE Application Engine process to delete the results of all the selected scenario calculation runs.

Navigation:

Compensation > **Forecast Compensation FRA** > **Process Forecast** > **Purge Scenario History**

This example illustrates the fields and controls on the Purge Scenario History page.

Field or Control	Description
Scenario Filter	This group box identifies the User ID and Run Control IDs by which to search. To search all histories, click the lightning icon.
Scenario History Purge	Chose a scenario to purge by selecting the **Purge** check box. Note that only the results of the scenario calculation are purged; the scenario definition remains in the database. Information appears in all fields here.

Click **Run** to run this request. PeopleSoft Process Scheduler runs the Purge Scenario History process at user-defined intervals.

Viewing Scenario History

Perform forecasting activities in two ways:

- Define different scenario IDs, attach a different set of events to them, and run the calculation process for each scenario ID.

- Define only one scenario ID and change the events associated with this scenario ID each time that you process a new calculation.

Use the Scenario History pages to find which events were used for any scenario calculation. Modify and calculate a scenario repeatedly without recalling the events that were used in each calculation.

Pages Used to View Scenario History

Page Name	Definition Name	Usage
Scenario History Page	LMS_SCENAR_HISTORY	Inquire about the process history of scenarios.

Page Name	Definition Name	Usage
Scenario History Details Page	LMS_SCENARHIST_SEC	View the run control parameters and events for any calculation.

Chapter 11

Viewing and Reporting Summary Salary Data

Viewing Compensation History

This section provides an overview of compensation history and discusses how to view employees' compensation history as administrators.

Pages Used to View Compensation History

Page Name	Definition Name	Usage
Employee Compensation History Page	COMP_SUMMARY	View the history of all pay rate changes the worker has received to date. This reference is useful when planning new increases.
"Rate Code Details Page" (PeopleSoft Human Resources Manage Positions)	WCS_RTCD_DETAILS	View additional information about the compensation rate code from the Comp Rate Code table.

Understanding Compensation History

The Employee Compensation History page shows the starting salary and all subsequent increases a worker has received. It shows the Hire and Rehire actions, and administrative actions that resulted in a change in salary data. It does not display every administrative action; for example, it does not show job movement.

It also shows the number of months since the worker's last increase, as well as how long the worker has been in a salary grade as of today. The details by pay component appear in a grid at the bottom of the page.

Employee Compensation History Page

Use the Employee Compensation History page (COMP_SUMMARY) to view the history of all pay rate changes the worker has received to date as an administrator.

This reference is useful when planning new increases.

Navigation:

- (Classic) **Compensation** > **Base Compensation** > **Review Salary Information** > **Employee Compensation History** > **Employee Compensation History**

- (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select **Compensation Management** > **Employee Compensation History**

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

As an administrator, you can review the details of the salary change history for the selected worker. The information is useful for planning new increases.

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

Field or Control	Description
Seq (sequence)	The sequence number of the salary change action.
Action and **Action Reason**	The action and reason that resulted in a salary change.
Plan, Grade, and **Step**	The worker's salary administration plan, salary grade, and salary step for this effective date, sequence, action, and reason.
Grade Entry Date	The date the worker entered the grade.
Yrs Grade (years in grade)	The number of years the worker has been in this grade.
Comp Rate (compensation rate) and **Frequency**	The worker's compensation rate as of this effective date, sequence, action, and reason, along with the frequency with which it is paid.
Month Last Incr (month last increase)	The number of months since the last increase.

Field or Control	Description
Change Amount	The amount of the worker's increase for this effective date, sequence, action, and reason.
Change Percent	The percent increase for this effective date, sequence, action, and reason.
Compa-Ratio	The worker's new compa-ratio for this effective date, sequence, action, and reason. The system calculates the compa-ratio figure from the data in the Salary Grade table.
Annual Rate	The worker's new annual rate as of this effective date, sequence, action, and reason.
% Range (percent range)	The worker's new percent that is in range for the effective date, sequence, action, and reason. The system calculates the percent in range figure from the data in the Salary Grade table.

Pay Components

The Amounts, Changes, and Conversions tabs display detailed pay information.

Related Links
"Comp Rate Code Table Page" (PeopleSoft Human Resources Administer Compensation)

Running Compensation Change Reports

This section lists the pages used to run compensation change reports.

Pages Used to Run Compensation Change Reports

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

Page Name	Definition Name	Usage
Salary History by Group Page	RUNCTL_CMP014	Run the Salary History by Group report (CMP014).

This report provides the salary changes for the workers in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change. |
| Salary History by Company Page | RUNCTL_PER023 | Run the Salary History by Company report (PER023).

This report displays each salary change for a worker during a specified time period. |
| Employee Compensation Changes Page | RUNCTL_PER013 | Run the Employee Compensation Changes report (PER013).

This report lists workers who have had compensation rate changes within a selected time period. |
| Report Merit Increases Page | RUNCTL_SP_MERIT | Run the Merit Increase report (PER041).

This report lists all workers who have received a merit increase during the period entered on the parameter page. |

Related Links

"Basic PeopleSoft HCM Reports: A to Z" (Application Fundamentals)

Viewing Worker Ranking

This section provides an overview of worker ranking and discusses how to view worker ranking.

Pages Used to View Worker Ranking

Page Name	Definition Name	Usage
Employee Ranking by Job Code Page	JOB_RANKING	View how workers rank in terms of compensation within a job code.

Page Name	Definition Name	Usage
Salary Components Page	COMP_EMPL_RANK_SEC	View the details of the worker's compensation package associated with the current job data row.
Rate Code Details Page	WCS_RTCD_DETAILS	Review detail information about a specific rate code.
Anonymous Ranking Page	JOB_RANKING_NO_EE	View how workers rank in terms of compensation within a job code. To protect privacy, worker identification does not appear on the page.

Understanding Worker Ranking

The system provides two inquiry pages for viewing how workers rank in terms of compensation within a job code. Both pages group workers by salary plan and show the current ranges for the salary plan and grade. Use this information to compare compensation to the minimum, maximum, and midpoints for the grade and to determine whether workers in a job code are being paid equitably in each location.

- The Employee Ranking by Job Code page lists workers by name and worker ID, and it displays their location, annual rate, compa-ratio, and percent in range.

  Use a link to the Salary Components page to view the details of the selected worker's compensation package.

- The Anonymous Ranking page lists worker compensation without displaying names and worker ID numbers to preserve privacy.

  The page sorts worker compensation by currency in descending order of salary amounts, and it displays the location, annual rate, compa-ratio, and percent in range.

Employee Ranking by Job Code Page

Use the Employee Ranking by Job Code page (JOB_RANKING) to view how workers rank in terms of compensation within a job code.

Navigation:

Compensation > **Base Compensation** > **Review Salary Information** > **Employee Ranking by Job Code**

This example illustrates the fields and controls on the Employee Ranking by Job Code page.

Field or Control	Description
Minimum Pay Rate-Annual	The minimum annual salary in the grade.
Midpoint Pay Rate-Annual	The midpoint annual salary in the grade.
Maximum Pay Rate-Annual	The maximum annual salary in the grade.

Ratios Tab

Field or Control	Description
Compa-Ratio	Where workers' salaries lie in relation to the range midpoint for their salary grade.
%Range (percent range)	Where workers' salaries fall within the range for their salary grade.
Components	Click the **Components** icon to access the Salary Components page, where you can view workers' compensation details by pay component.

Related Links

"Classifying Jobs" (Application Fundamentals)

Salary Components Page

Use the Salary Components page (COMP_EMPL_RANK_SEC) to view the details of the worker's compensation package associated with the current job data row.

Navigation:

Click the **Components** icon on ton the Ratios tab in the Compensation Rating section of the Employee Ranking by Job Code page.

This example illustrates the fields and controls on the Salary Components page.

For each salary change, this page displays pay component details from the worker's job and compensation records.

Common Elements Used in This Page

Field or Control	Description
Compensation Rate and **Comp Freq** (compensation frequency)	The worker's annual compensation rate and compensation frequency.

Pay Components

This section of the page displays the details of the compensation package associated with the worker's most current job data row, as displayed on the Employee Ranking by Job Code page.

Amounts Tab

For each salary change, this page displays pay component details from the worker's job and compensation records. On the Amounts tab, the system displays the description of the pay component before the salary change.

Field or Control	Description
Rate Code	The rate code of the salary change.
Seq (sequence)	The rate code sequence number.
Comp Rate (compensation rate), **Currency,** and **Frequency**	The compensation rate, currency, and frequency associated with the rate code.
Points	If the rate code type is *Points,* the system displays the number of points defined for this rate code.
Percent	If the rate code type is *Percent,* the system displays the percent defined for this rate code.
Rate Code Group	If the rate code type is *Percent,* the system displays the rate code group to which the percent applies.

Controls Tab

Field or Control	Description
Default Without Override	If this check box is selected, the compensation rate of the workers assigned to this rate code cannot be manually updated on the Compensation page of the Job Data component. Typically, this option is used for seniority rate codes. It is also used for rate codes that use an absorbable premium on the Salary Plan table after the rate code has been added to a worker compensation package.
Details	Click to access the Rate Code Details page to view additional information about the rate code.

Changes Tab

Field or Control	Description
Change Amount	If the rate code type is *flat amount* or *hourly rate,* the system displays the change amount associated with the rate code.

Field or Control	Description
Change Points and **Change Percent**	If the rate code type is *Points or Percent,* the system displays the change points and the change percent associated with the rate code.

Conversion Tab

Field or Control	Description
Converted Comp Rate (converted compensation rate)	The new compensation rate for the rate code converted to the worker's compensation frequency and currency.
Apply FTE (apply full-time equivalent)	This check box is selected if you elected to apply FTE calculations to frequency calculations of this rate code.

Anonymous Ranking Page

Use the Anonymous Ranking page (JOB_RANKING_NO_EE) to view how workers rank in terms of compensation within a job code.

To protect privacy, worker identification does not appear on the page.

Navigation:

Compensation > **Base Compensation** > **Review Salary Information** > **Anonymous Ranking** > **Anonymous Ranking**

This example illustrates the fields and controls on the Anonymous Ranking page.

The fields on this page are identical to the fields on the Employee Rank by Job Code page with these exceptions:

Field or Control	Description
Min/Annual (minimum annual)	The minimum annual salary in the grade.
Midpt/Annual (midpoint annual)	The midpoint annual salary in the grade.
Max/Annual (maximum annual)	The maximum annual salary in the grade.
Grade Date	The date the worker entered the salary grade.
Yrs Grade (years in grade)	The number of years the worker has been in the grade.

Viewing Job Evaluations

This section provides an overview of job evaluations and discusses how to compare job evaluation criteria among job codes.

Pages Used to View Job Evaluations by Grade

Page Name	Definition Name	Usage
Job Evaluations by Grade Page	JOB_EVALUATIONS	Compare job evaluation criteria among job codes within a salary plan and grade.
Job Evaluations by Grade USF Page	GVT_JOB_EVALUATION	Compare job evaluation criteria among job codes within a salary plan and grade.

Understanding Job Evaluations

A job evaluation is a method of ranking job codes relative to one another. You create job evaluation criteria in the Job Code Table, assigning points for various skills, such as knowledge and experience (Knowhow), accountability, and problem-solving. On the Job Evaluations by Grade inquiry page, you can view the evaluation information along with the managerial level and function of each job code. Job codes are sorted in descending order by total points.

You can also generate the Job Grading by Evaluation Points report (CMP002), which provides similar information.

Job Evaluations by Grade Page

Use the Job Evaluations by Grade page (JOB_EVALUATIONS) to compare job evaluation criteria among job codes within a salary plan and grade.

Navigation:

Compensation > **Base Compensation** > **Review Salary Information** > **Job Evaluations by Grade**

This example illustrates the fields and controls on the Job Evaluations by Grade page.

Current Annual Ranges

The system displays the following information about the salary grade, as you defined it on the Salary Grade Table page:

Field or Control	Description
Minimum, Midpoint, and **Maximum**	Minimum, midpoint, and maximum annual compensation in the grade.

Job Evaluation

Field or Control	Description
Total Points, Job Function, and **Manager Level**	Enter the corresponding values associated with this job code.
Knowhow, Accountability, and **Problem-Solving**	Displays the number of points associated with this criterion for this job code.

Chapter 12

Predefined Source IDs and Result IDs for Configurable Matrices

Predefined Source IDs

This is a list of the predefined source IDs delivered as system data. Use these source IDS to define and maintain inputs used in configurable matrices.

SOURCE_ID	SOURCE_TYPE_ID	Label	Description
COUNTRY	ADDRESS	Country	Country of Business Address
SENIORITY_DATE	DATES	Seniority Date	Seniority Date
ANNUAL_RATE	EMPINFO	Annual Rate	Annual Comp Rate
APPOINTMENT_TYPE	EMPINFO	Appt type	Appointment Type
BARGAINING_UNIT	EMPINFO	Unit	Bargaining Unit
BEN_STATUS	EMPINFO	Benefit Status	Benefit Status
BENEFIT_SYSTEM	EMPINFO	Benefit System	Benefit System
BUSINESS_UNIT	EMPINFO	Business Unit	Business Unit
COMPANY	EMPINFO	Company	Company
COMPRATE	EMPINFO	Base Rate	Base Compensation Rate
DEPARTMENT	EMPINFO	Department	Department of Employee
EEO_CLASS	EMPINFO	EEO Class	EEO Classification
EMPL_CLASSIFICATION	EMPINFO	Empl Class	Employee Classification
EMPL_CTG	EMPINFO	Empl Category	Employee Category

SOURCE_ID	SOURCE_TYPE_ID	Label	Description
EMPL_STATUS	EMPINFO	Payroll Status	Employee Payroll Status
EMPL_TYPE	EMPINFO	Employee Type	Employee Type
FLSA_STATUS	EMPINFO	FLSA Status	FLSA Status
GRADE	EMPINFO	Grade	Grade
JOBCODE	EMPINFO	Job Code	Job Code
LOCATION	EMPINFO	Location	Employee Location
PERSON_NAME	EMPINFO	Name	Person Name
SAL_ADMIN_PLAN	EMPINFO	Sal Admin Plan	Salary Administration Plan
STEP	EMPINFO	Sal Step	Salary Grade Step
UNION_CODE	EMPINFO	Union	Union Code
EMPL_GRD_MAXHRLY	EMPRELATED	GradeMaxHourly	Hourly Rate of Grade Maximum
MANAGER_LEVEL	EMPRELATED	Manager Level	Manager Level of Job
GEOAREA	GEOGRAPHY	Geog Area	Geographical Area
POS_SUPV_LVL	POSITION	Pos Supr Level	Position Supervisor Level
PERFRATING	RATING	Perf Rating	Test Perf Rating
COMPA-RATIO	RATIOS	Compa-Ratio	Compa Ratio
JOB-RATIO	RATIOS	Job Ratio	Job Ratio
PERCENT-IN-RANGE	RATIOS	% in Range	Percent in Range
GRD1STEP1_HRLY	STEPRATE	Grd1Step1_Hrly	Hourly Rate of Grade 1 Step 1
COMPCODE	SUPPLIED	CompCode	Comp Code

SOURCE_ID	SOURCE_TYPE_ID	Label	Description
CURRENCY	SUPPLIED	Currency	Currency Code
EMPLID	SUPPLIED	EmplID	Employee ID
SURVEY_JOB_CODE	SUPPLIED	Survey Job Code	Survey Job Code
SURVEY_PROVIDER	SUPPLIED	Survey Provider	Survey Provider
MONTHS_IN_COMPANY	TIMESPAN	MonthsofService	Months in Company

Predefined Result IDs

This is a list of the predefined result IDs delivered as system data. You can also create additional result IDs. Use these values to define outputs for configurable matrices.

Result_ID	RESULT_TYPE_ID	Label	Description
AWARD	SIMPLECHAR	Award	Variable Comp Award
CURRENCY	SIMPLECHAR	Currency	Currency
PROVIDER	SIMPLECHAR	Provider	Survey Provider
PROVIDER_DESCRIPTION	SIMPLECHAR	Provider Desc	Survey Provider Description
SALARY_SURVEY_ DEFAULT	SIMPLECHAR	Survey Default	Salary Survey Default
SOURCE_REFERENCE	SIMPLECHAR	Source Ref	Source Reference
SURVEY_JOBCODE	SIMPLECHAR	Survey Job Code	Survey Job Code
10_PERC	SIMPLENUM	10th Perc	10th Percentile
100_PERC	SIMPLENUM	100th Percentile	100th Percentile
15_PERC	SIMPLENUM	15 Perc	15th Percentile
16_6PERC	SIMPLENUM	16.6 Prcntile	16.6th Percentile

Result_ID	RESULT_TYPE_ID	Label	Description
20_PERC	SIMPLENUM	20th Perc	20th Percentile
25_PERC	SIMPLENUM	25th Percentile	25th Percentile
30_PERC	SIMPLENUM	30th Percentile	30th Percentile
33_3PERC	SIMPLENUM	33.3rd Prcntile	33.3rd Percentile
35_PERC	SIMPLENUM	35th Percentile	35th Percentile
40_PERC	SIMPLENUM	40th Percentile	40th Percentile
45_PERC	SIMPLENUM	45th Percentile	45th Percentile
5_PERC	SIMPLENUM	5th Perc	5th Percentile
50_PERC	SIMPLENUM	50th Percentile	50th Percentile
55_PERC	SIMPLENUM	55th Percentile	55th Percentile
60_PERC	SIMPLENUM	60th Percentile	60th Percentile
65_PERC	SIMPLENUM	65th Percentile	65th Percentile
66_6PERC	SIMPLENUM	66.6th Percntile	66.6th Percentile
70_PERC	SIMPLENUM	70th Percentile	70th Percentile
75_PERC	SIMPLENUM	75th Percentile	75th Percentile
80_PERC	SIMPLENUM	80th Percentile	80th Percentile
83_3PERC	SIMPLENUM	83.3rd Prcntile	83.3rd Percentile
85_PERC	SIMPLENUM	85th Percentile	85th Percentile
90_PERC	SIMPLENUM	90th Percentile	90th Percentile
95_PERC	SIMPLENUM	95th Percentile	95th Percentile

Result_ID	RESULT_TYPE_ID	Label	Description
AMOUNT	SIMPLENUM	Amount	Compensation Amount
BASE	SIMPLENUM	Base	Base Compensation
BASE_MAXIMUM	SIMPLENUM	Base Maximum	Base Maximum
BASE_MEAN	SIMPLENUM	Base Mean	Base Mean
BASE_MEDIAN	SIMPLENUM	Base Median	Base Median
BASE_MINIMUM	SIMPLENUM	Base Minimum	Base Minimum
BASE_MKT_REFERENCE	SIMPLENUM	Base Mkt Ref	Base Market Reference
BONUS_PERCENT	SIMPLENUM	Bonus Percent	Bonus Percentage
DEFAULT_AMOUNT	SIMPLENUM	Default Amount	Default Comp Amount
DEFAULT_PERCENTAGE	SIMPLENUM	Default Percent	Default Percentage
DEFAULT_POINTS	SIMPLENUM	Default Points	Default Points
MAXIMUM_AMOUNT	SIMPLENUM	Max Amount	Maximum Amount
MAXIMUM_PERCENTAGE	SIMPLENUM	Max Percentage	Maximum Percentage
MAXIMUM_POINTS	SIMPLENUM	Max Points	Maximum Points
MEAN_BASE_RATE	SIMPLENUM	Mean Base Rate	Mean Base Rate
MEAN_TOTAL_ COMPENSATION	SIMPLENUM	Mean Total Comp	Mean Total Compensation
MEDIAN_BASE_RATE	SIMPLENUM	Median Base Rat	Median Base Rate
MEDIAN_TOTAL_ COMPENSATION	SIMPLENUM	Med Total Comp	Median Total Compensation
MIDPOINT_RATE	SIMPLENUM	Midpoint Rate	Midpoint Rate - Base Comp
MINIMUM_AMOUNT	SIMPLENUM	Min Amount	Minimum Amount

Result_ID	RESULT_TYPE_ID	Label	Description
MINIMUM_PERCENTAGE	SIMPLENUM	Min Percent	Minimum Percentage
MINIMUM_POINTS	SIMPLENUM	Min Points	Minimum Points
MKT_SOURCE_ REFERENCE	SIMPLENUM	Mkt Source Ref	Market Source Reference
NEW_AMOUNT	SIMPLENUM	New Rate	New Compensation Rate Amount
NEW_POINTS	SIMPLENUM	Points	Compensation Rate Points
PERCENTAGE	SIMPLENUM	Percentage	Compensation Percentage
ROUNDING_THRESHOLD	SIMPLENUM	Rounding Thresh	Rounding Threshold
SURVEY_SALARY	SIMPLENUM	Survey Salary	Survey Salary
TOTAL_COMPENSATION	SIMPLENUM	Total Comp	Total Compensation
TOTAL_COMPENSATION_ REF	SIMPLENUM	Total Comp Ref	Total Compensation Reference
VARIABLE_MARKET_ REFERENCE	SIMPLENUM	Variable MktRef	Variable Market Reference
VARIABLE_MAXIMUM	SIMPLENUM	Variable Maximum	Variable Maximum
VARIABLE_MEAN	SIMPLENUM	Variable Mean	Variable Mean
VARIABLE_MEDIAN	SIMPLENUM	Variable Median	Variable Median
VARIABLE_MINIMUM	SIMPLENUM	Variable Minimum	Variable Minimum
VARIABLE_TARGET_PCT_ REFERENCE	SIMPLENUM	Var Tgt Pct Ref	Variable Target Pct Reference
VARIABLE_TARGET_ PERCENT	SIMPLENUM	Variable TgtPct	Variable Target Percent
SURVEY_DATE	SIMPLEDATE	Survey Date	Survey Date

Result_ID	RESULT_TYPE_ID	Label	Description
INCREMENT_AMOUNT	INCRBYAMT	Incr Amount	Increment Amount
INCREMENT_PERCENT	INCRBYAMT	Incr Percent	Increment Percent
PERCENT_TO_APPLY	PCNTOFBASE	Pct to Apply	Percent to Apply
ANNUAL_RATE_SOURCE	SOURCE	Annual Rate Src	Annual Compensation Rate
EMPL_GRD_MAXHRLY	SOURCE	Annual Rate Src	Annual Compensation Rate
THRESHOLD	THRESHOLD	Threshold	Threshold