Oracle Human Capital Management Cloud
Using Workforce Compensation

19C
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons 🛠️ to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Overview

Overview of Manage Compensation

This overview introduces the main business activities for the Manage Compensation business process within the following task:

- Manage base pay
- Manage individual compensation and personal contributions
- Manage compensation budgets
- Administer and manage workforce compensation
The following figure shows the business activities by task and role.

<table>
<thead>
<tr>
<th>Role</th>
<th>Manage Base Pay</th>
<th>Manage Individual Compensation and Personal Contributions</th>
<th>Manage Compensation Budgets</th>
<th>Administer and Manage Workforce Compensation</th>
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</thead>
<tbody>
<tr>
<td>Compensation Administrator</td>
<td></td>
<td></td>
<td></td>
<td>Maintain Plans, Initiate Cycle, Manage and Transfer Data</td>
</tr>
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<td>Compensation Manager</td>
<td>Manage Individual Base Pay Records</td>
<td>Manage Off-Cycle Compensation Awards for Individuals</td>
<td>Initiate Budgets and Automatically Publish to Line Managers</td>
<td>Manage Models, Override Manager Allocations, or Act as Proxy</td>
</tr>
<tr>
<td>Line Manager</td>
<td>Manage Individual Base Salary, View Salary History</td>
<td>Manage Individual Variable Compensation, View History</td>
<td>Determine Budget Amounts to Distribute or Allocate</td>
<td>Allocate Compensation, View History, Rate Performance</td>
</tr>
<tr>
<td>HR Specialist</td>
<td>Manage Individual Base Salary, View Salary History</td>
<td>Manage Individual Variable Compensation, View History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Worker</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Manage Base Pay**

Line managers and HR specialists can:

- View and change an individual worker’s salary basis
- Adjust base pay
- View salary history
Compensation managers can perform the same tasks for oversights, overrides, or acting as a proxy.

Manage Individual Compensation

Line managers and HR specialists can:

- View, allocate, and adjust individual ad-hoc variable compensation awards or recurring payments
- View compensation history

Compensation managers can perform the same tasks for oversights, overrides, or acting as a proxy.

Manage Personal Contributions

Workers can manage their own enrollment and voluntary contributions in company-sponsored savings and charitable contribution plans.

Manage Compensation Budgets

Compensation managers ensure that manager allocations stay within defined budget amounts by initiating and publishing budgets to line managers.

Line managers then distribute budgets down the reporting hierarchy or allocate budget amounts at the worker level.

Manage Workforce Compensation

Line managers can:

- Allocate, manually or automatically, one or more types of compensation for groups of workers on a focal, anniversary, or periodic basis
- Approve allocations of lower level managers
- Promote and rate worker performance and view compensation history while awarding compensation

Administer Workforce Compensation

Compensation administrators can:

- Run processes to initiate a compensation cycle, refresh HR data, and transfer data to workers' HR records
- Maintain plan configuration for new and current plan cycles

Compensation managers can:

- Manage and override worker information and allocations
- Analyze the results of compensation cycles using administrative reports
To manage compensation in the Manage Compensation business process, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Administrator</td>
<td>Setup and Maintenance</td>
</tr>
<tr>
<td></td>
<td>My Client Groups - Compensation</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Client Groups - Compensation</td>
</tr>
<tr>
<td></td>
<td>My Team - Workforce Compensation</td>
</tr>
<tr>
<td>Line Manager</td>
<td>My Dashboard - Manager Resources</td>
</tr>
<tr>
<td></td>
<td>My Team - Workforce Compensation</td>
</tr>
<tr>
<td>HR Specialist</td>
<td>My Client Groups- Person Management</td>
</tr>
<tr>
<td>Worker</td>
<td>Me - Personal Information</td>
</tr>
</tbody>
</table>

**Related Topics**

- Overview of Base Pay Management
- Overview of Individual Compensation Management
- Overview of Manage Compensation Budgets
- Overview of Administer Workforce Compensation
- Overview of Manage Workforce Compensation
2 Use Integrated Workbooks

Edit Salaries in the Integrated Workbook

You can edit salary data using an integrated Microsoft Excel workbook. You can edit salaries, but you can’t change the associated salary bases.

Download Salaries

You download salaries in the Compensation work area.

1. In the tasks panel tab, click Download Salaries.
2. Select the relevant download parameters. Be sure to include the latest salary start date and local currency if you plan to upload your changes.
   The currency shown comes from the input value of the payroll element associated with the salary basis.
3. Click Preview Download to view the data that matches your download parameters.
4. Click Prepare in Workbook to generate the workbook and populate it with the data that matches your download parameters.

Edit Salary Data

You can change values in cells with a white background. The workbook adds a symbol in the Changed field to mark the rows where you changed values in one of the white cells. If you enter a new base salary, you also need to enter a new salary start date. Make sure that the new base salary and current base salary are different. Otherwise, you get errors when you upload your changes.

The workbook contains five columns to hold data for up to five active salary components of a salary basis. When you have less than five active salary components, only the column cells for those components have values. If you have more than five active salary components, the workbook includes columns and values for only the first five components.

Upload Salary Changes

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

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

Validate Changes

Open the Manage Salaries page, then search for and select a person whose salary you updated.
Resolve Errors

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

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

To view and resolve an error:

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

**Related Topics**

- What’s the difference between Export to Excel and desktop integration for Excel

Import Market Data in the Integrated Workbook

You can enter and edit market survey data and upload it into the application using an integrated Microsoft Excel workbook. Before importing market data, you need to create any missing compensation types. Also add the survey supplier name and contact information.

Create the Import Template

In the Compensation work area, use the seven market data workbooks to import market data. Create the initial market data survey objects in the following order using the Manage Supplier Surveys task:

1. On the Manage Survey Job Structures page, click **Create Import Template** and select one of the five templates.
   
   You can import the job functions, job families, career streams or bands, career levels, and other levels in any order.
2. On the Manage Survey Job List page, click **Create Import Template**.
3. On the Import Survey page, create the template to import your survey.

   You can also use the import survey template to change an existing survey. Changes can include loading new job structures and changing existing ones.

Enter Market Data

Copy the relevant job structures, job list, or survey data from the reports provided by the supplier and paste them into the workbook. The workbook add a symbol in the **Changed** field to mark the rows that you added.

The upload process expects only one supplier code, survey code, or combination of supplier and survey codes per template. If you have multiple codes, create a separate template for each one.

⚠️ **Caution:** Don’t delete or reorder template columns. The upload process might fail.
Upload Market Data

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

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

Validate Changes

To validate the changes:

1. View the new or changed data using the **Manage Supplier Structures** task. With this task, you can open the Manage Survey Job Structures or Manage Survey Job List page.
2. Refresh the page to see the newly imported survey using the **Import Survey** task. Click the survey name to open the Imported Survey Data page.

Resolve Errors

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

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

To view and resolve an error:

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

Manage Budget Sheets and Worksheets in the Integrated Workbook

You can change workforce budget and compensation amounts using the integrated Microsoft Excel workbook. Download the current budget sheet and worksheet data, make your changes, and upload them to the application database.

Download the Workbooks

In the Workforce Compensation work area, on either the budget sheet or worksheet, click **Prepare in Workbook** to create the workbook. The export builds the workbook for your entire organization, not just the workers in the worksheet or the budget sheet. The workbook format and content is independent of anything you did to personalize the budget sheet or worksheet.

For example, the workbook doesn’t apply the filters you set. It also doesn’t freeze, hide or show, reorder or change the size, or sort columns and data to match the budget sheet or worksheet.
Edit Budget or Workbook Data

After the download completes, you can change data in cells with a white background. The workbook adds a symbol in the Changed cell to mark the rows where you changed or entered data in one of the white cells. You can only enter values in amount columns. You can’t enter or change a value in a percentage column. When you upload your changes, the application recalculates the percentage of eligible salary column using the compensation amount you entered in the workbook.

The workbook doesn’t change results of dynamic calculations and fast formulas when you change values that they use. The application recalculates the results after you upload your changes and refresh the page. The recalculation happens only if you have configured the calculations and formulas to recalculate when data changes on the worksheet.

Upload Budget or Worksheet Changes

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

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

Validate Changes

To see the updated data, leave the budget sheet or worksheet and then return. Or if your session expired, sign back in.

Resolve Errors

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

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

To view and resolve an error:

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

Related Topics

- What’s the difference between Export to Excel and desktop integration for Excel

Import External Compensation Data in the Integrated Workbook

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

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

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

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

Generate the Workbook

Create the external data workbook in the Compensation work area.

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

Enter External Data

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

Upload External Data

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

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

Validate Changes

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

Resolve Errors

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

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

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.
New uploads to existing data make date-effective changes to the data.

Related Topics
- External Data Lookups

Manage Stock Grants in the Integrated Workbook
You can add and edit stock grant data and upload it into the application using an integrated Microsoft Excel workbook.

Download the Workbook
You manage stock grants in the Compensation work area.

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

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

⚠️ Caution: Don’t delete or reorder template columns. The upload process might fail.

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

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

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

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

1. Rolls back the change in the application.
2. Sets the workbook row status to Upload Failed
3. Continues to the next workbook row
To view and resolve an error:

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

**Related Topics**
- How can I import stock data sent to me by my supplier

**Set Up Desktop Integration for Excel**

You can create or edit records that you can upload to the application using integrated Excel workbooks. To use these workbooks, you must install an Excel add-in.

**Note:** Every release of Oracle Fusion Applications is likely to have a new version of the Oracle ADF Desktop Integration add-in. When prompted, install the latest version of the add-in. For more information, see Add-In Upgrade Policy for ADF Desktop Integration (2242879.1) on My Oracle Support at https://support.oracle.com.

**Before You Start**

- Make sure you have an Excel and Windows version that’s listed in Supported Platforms for ADF Desktop Integration (2242428.1) on My Oracle Support at https://support.oracle.com.
- If you’re reinstalling the Excel add-in and currently have a version older than 11.1.1.7.3 (4.0.0), then uninstall the existing Oracle ADF Desktop Integration Add-In for Excel the same way you uninstall any program on your computer.

  **Tip:** You can find the version in the control panel where you uninstall programs.

- Optionally install the following from the Microsoft website.
  - Microsoft .NET Framework 4.5.2
  - Microsoft Visual Studio 2010 Tools for Office Runtime (VSTO Runtime)

  The add-in installer does check if you have these already, and would download and install them if needed. But, you can manually install them first, especially if you run into issues installing them as part of installing the Excel add-in.

**Install the Desktop Add-In**

To install the Oracle ADF 11g Desktop Integration Add-In for Excel:

1. Make sure you are signed in to your computer with your account. For example, you can't have someone else sign in as an administrator and make the installation available for everyone using your computer.
2. In the application, look for the client installer in **Navigator > Tools**.
3. Run the installer (**adfdi-excel-addin-installer.exe**) as you would any program that you install on your computer.
Guidelines for Using Desktop Integrated Excel Workbooks

Where available, you can download a desktop-integrated Microsoft Excel workbook and use it to create or edit records. Your edits in the workbook don’t affect the application until you upload the records back into the application.

What You Must Not Do
To ensure that you successfully upload to the application, don’t:

- Rename text from the integrated workbook, for example the worksheet or tab names.
- Add columns.
- Delete any part of the template, for example columns.
- Hide required columns and status columns or headers.

⚠️ Caution: Avoid using the Windows Task Manager and clicking **End Task** to close Excel. Doing so might disable the add-in.

Conventions
Some column headers in the integrated workbook might include `[.]`. This means that you can double-click or right-click within any cell in the column to open a dialog box, which lets you select a value to insert into that cell.

Statuses
To use the Status Viewer:

1. Open the tab for your task in the Ribbon, if available. For example, if you downloaded a workbook to create expense items, the tab is called Create Expense Items.
2. Click **Status Viewer**.
3. In the worksheet, click any table row to see the status of the row, including messages for any errors. The Status Viewer always shows the status of the entire worksheet.

Searches
Some integrated workbooks have searches. To search within the workbook, you must be signed in to the application. When you click the search button, the application prompts you to login if you haven’t already logged in.

Refreshes After Upload
If your changes aren’t reflected after an upload, try the following to refresh the table in the application:

- Use the refresh option for the table
- Apply a filter or search on the table

Related Topics

- How You Use Tables
Troubleshoot Desktop Integration for Excel

The application is integrated with Microsoft Excel so that, where available, you can work with records in a desktop integrated workbook. You might run into issues with the integration, for example, if you can’t open the workbook that you downloaded or the workbook doesn’t look right. You can use the Client Health Check Tool. For more information see Information Center: Troubleshooting Oracle ADF Desktop Integration (2012600.2) on My Oracle Support at https://support.oracle.com.

Use the Client Health Check Tool

Use the health check tool to find out what integration issues you might have and how to resolve them. Ask your help desk if you are unable to find or use the tool.

1. Download the latest version of the health check tool from How to use ADF Desktop Integration Client Health Check Tool (2010222.1) on My Oracle Support at https://support.oracle.com.
2. Run `ClientHealthCheck.exe` as you would other programs on your computer, and review the result for each checked item.
3. Select any item that has a problem, and read the help text.
4. Fix some of the problems by clicking the Fix Problems button. Otherwise, follow the instructions in the help text.
5. If you need more assistance, click the Save Report As button to prepare information for your help desk.
6. Review the report and remove any sensitive information.
7. Contact your help desk and provide your report.
3 Manage Base Pay

Overview of Base Pay Management

View and adjust workers’ base salary. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes. They can:

- View a worker’s salary basis and change it, subject to security and other constraints.
- Adjust base pay by adjusting:
  - Amount
  - Percentage
  - Compa-ratio
  - Other salary factors
- View salary history, as well as graphical analysis of current and new salary.

To manage base pay, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Manager</td>
<td>My Dashboard - Manager Resources</td>
</tr>
<tr>
<td></td>
<td>My Client Groups - Person Management</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Client Groups - Compensation</td>
</tr>
<tr>
<td>HR Specialist</td>
<td>My Client Groups - Person Management</td>
</tr>
</tbody>
</table>

How FTE and Key Salary Fields Work Together

The key salary fields are salary amount, annual salary, and annualized full-time salary.

<table>
<thead>
<tr>
<th>Key Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Amount</td>
<td>The actual salary the employee receives. This amount has the same periodicity as the salary basis, such as <strong>Annual</strong> or <strong>Hourly</strong>. The numeric form of the periodicity, such as <strong>12</strong> or <strong>2080</strong>, is called annualization factor.</td>
</tr>
</tbody>
</table>
Key Field | Description
---|---
**Annual Salary** | The salary amount that’s converted to the annual periodicity for the employee’s FTE (full-time equivalent).

Calculation: (Salary Amount * Annualization Factor)

**Annualized Full-Time Salary** | The salary amount that’s converted to the annual periodicity and calculated as if the employee’s FTE was 1.0.

Calculation: (Salary Amount * Annualization Factor) / FTE

The annual salary and annualized full-time salary amounts are the same for full-time employees and different for part-time employees because of the FTE.

**Sample Salary Info for a Full-Time Employee**

Here’s sample salary information for a full-time employee with an FTE of 1.0.

<table>
<thead>
<tr>
<th>Periodicity</th>
<th>Annual</th>
<th>Monthly</th>
<th>Weekly</th>
<th>Work Hourly</th>
<th>Hourly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annualization Factor</td>
<td>1</td>
<td>12</td>
<td>52</td>
<td>2080</td>
<td>2920</td>
</tr>
<tr>
<td>Salary Amount</td>
<td>156,000</td>
<td>13,000</td>
<td>3,000</td>
<td>75</td>
<td>50</td>
</tr>
<tr>
<td>Annual Salary</td>
<td>156,000</td>
<td>156,000</td>
<td>156,000</td>
<td>156,000</td>
<td>146,000</td>
</tr>
<tr>
<td>Annualized Full-Time Salary</td>
<td>156,000</td>
<td>156,000</td>
<td>156,000</td>
<td>156,000</td>
<td>146,000</td>
</tr>
</tbody>
</table>

**Sample Salary Info for a Part-Time Employee**

Here’s sample salary information for a part-time employee with an FTE of 0.6.

<table>
<thead>
<tr>
<th>Periodicity</th>
<th>Annual</th>
<th>Monthly</th>
<th>Weekly</th>
<th>Work Hourly</th>
<th>Hourly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annualization Factor</td>
<td>1</td>
<td>12</td>
<td>52</td>
<td>2080</td>
<td>2920</td>
</tr>
<tr>
<td>Salary Amount</td>
<td>93,600</td>
<td>7,800</td>
<td>1,800</td>
<td>75</td>
<td>50</td>
</tr>
<tr>
<td>Annual Salary</td>
<td>93,600</td>
<td>93,600</td>
<td>93,600</td>
<td>93,600</td>
<td>87,600</td>
</tr>
<tr>
<td>Annualized Full-Time Salary</td>
<td>156,000</td>
<td>156,000</td>
<td>156,000</td>
<td>156,000</td>
<td>146,000</td>
</tr>
</tbody>
</table>
Hourly Salaries and Salary Amounts

In both examples, the salary amounts don’t change for the **Work Hourly** and **Hourly** salaries. That’s because salaries with hourly periodicities aren’t affected by FTE the way salaries with any of the other periodicities are. The hourly rate is always the hourly rate for any FTE.

Examples of Full-Time Salary and Annualized Salary Calculations

The following scenarios illustrate how the application calculates annual salary and annualized full-time salary. The scenarios use standard working hours, worker’s working hours and full-time equivalent (FTE), salary amount, annualization factor, and frequency.

This topic lists the common assumptions and calculations for the following three scenarios:

- Worker’s hours equal the standard working hours
- Worker’s hours are less than the standard working hours
- Worker’s hours are greater than the standard working hours

Assumptions

All of the examples assume the following:

- Legal employer standard working hours per week is 40.
- Currency is US dollars (USD).
- FTE is calculated by dividing the worker’s working hours per week by the standard working hours per week.
- Annualization factor for hourly workers represents the Legal Employer Standard Working Hours per Week x Weeks per Year.

The standard working hours, working hours, and FTE come from the worker’s employment record. You can view it using the Manage Employment task in the Person Management work area. The annualization factor and the frequency for the salary come from the salary basis associated with the worker’s salary record.

Worker’s Hours Equal the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

<table>
<thead>
<tr>
<th>Calculation Input</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker’s standard working hours</td>
<td>40</td>
</tr>
<tr>
<td>FTE</td>
<td>1</td>
</tr>
</tbody>
</table>
Calculation Input | Value
--- | ---
Annualization factor | 2080

Base Pay | 15 USD

Calculation:

- Annual salary: $15 \times 2080 = 31,200 USD$
- Annualized full-time salary: $15 \times \frac{2080}{1} = 31,200 USD$

Worker’s Hours Are Less Than the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

Calculation Input | Value
--- | ---
Worker’s standard working hours | 20
FTE | 0.5
Annualization factor | 2080
Base Pay | 15 USD

Calculation:

- Annual salary: $15 \times 2080 \times 0.5 = 15,600 USD$
- Annualized full-time salary: $15 \times \frac{2080}{1} = 31,200 USD$

The following table shows the inputs for this scenario for a monthly rate:

Calculation Input | Value
--- | ---
Worker’s standard working hours | 20
FTE | 0.5
Annualization factor | 12
Base Pay | 5,000 USD

Calculation:

- Annual salary: $5,000 \times 12 = 60,000 USD$
• Annualized full-time salary: \(5,000 \times (12/0.5) = 120,000 \text{ USD}\)

The following table shows the inputs for this scenario for an annual rate:

<table>
<thead>
<tr>
<th>Calculation Input</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker's standard working hours</td>
<td>20</td>
</tr>
<tr>
<td>FTE</td>
<td>0.5</td>
</tr>
<tr>
<td>Annualization factor</td>
<td>1</td>
</tr>
<tr>
<td>Base Pay</td>
<td>50,000 USD</td>
</tr>
</tbody>
</table>

Calculation:
• Annual salary: \(50,000 \times 1 = 50,000 \text{ USD}\)
• Annualized full-time salary: \(50,000 \times (1/0.5) = 100,000 \text{ USD}\)

**Worker's Hours Are Greater Than the Standard Working Hours**

The following table shows the inputs for this scenario for an annual rate:

<table>
<thead>
<tr>
<th>Calculation Input</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker's standard working hours</td>
<td>48</td>
</tr>
<tr>
<td>FTE</td>
<td>1.2</td>
</tr>
<tr>
<td>Annualization factor</td>
<td>1</td>
</tr>
<tr>
<td>Base Pay</td>
<td>20,000 USD</td>
</tr>
</tbody>
</table>

Calculation:
• Annual salary: \(20,000 \times 1 = 20,000 \text{ USD}\)
• Annualized full-time salary: \(20,000 \times (1/1.2) = 16,667 \text{ USD}\)

**Related Topics**
• How Many Salary Bases to Create
How You Change an Employee's Salary to Account for a Changed FTE

Typically, when you change the FTE (full-time equivalent) value you also need to change the salary amount. These values are automatically calculated:

- Salary range minimum, midpoint, and maximum
- Annual salary, annualized full-time salary
- Compa-ratio, quartile, quintile, and salary range position

Adjust Salary Amount and Calculated Values Automatically

To automatically adjust the salary amount and calculated values using the new FTE, follow this best practice:

- After you create or change an FTE using the Manage Employment task, create a salary change using the Manage Salary task.
- Be sure to use the same date as the FTE change you just made. The previous FTE and calculations from the assignment remain in effect on the employee’s salary until you add this same-dated change. Then, the salary amount and calculations automatically adjust using the new FTE.

Examples of How FTE and Salary Amounts Changes Work

These examples show how an FTE (full-time equivalent) change effects a salary record depending on the salary basis frequency and whether you use components to itemize the salary adjustment.

Changes to a Monthly Salary Basis

Your actions:

1. Change an employee’s FTE from 1.0 to 0.5 starting on July 1, 2019 using the Manage Employment task.
2. Add a salary change that also starts on July 1, 2019 using the Manage Salary task.

Because you’re using the same start date, you don’t need to adjust the salary amount or related metrics. The adjustments are done automatically using the new FTE of 0.5.

<table>
<thead>
<tr>
<th>Salary Info</th>
<th>Previous Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Amount</td>
<td>10,000</td>
<td>5,000</td>
</tr>
<tr>
<td>Annual Salary</td>
<td>120,000</td>
<td>60,000</td>
</tr>
<tr>
<td>Annualized Full-Time Salary</td>
<td>120,000</td>
<td>120,000</td>
</tr>
</tbody>
</table>
Changes to an Hourly Salary Basis

Your actions:

1. Change an employee’s FTE from 1.0 to 0.5 starting on July 1, 2019 using the Manage Employment task.
2. Add a salary change that also starts on July 1, 2019 using the Manage Salary task.

Because you’re using the same start date, you don’t need to adjust the salary amount or related metrics. The adjustments are done automatically using the annualization factor of 2080 and the new FTE of 0.5. Note that the salary amount isn’t automatically adjusted. That’s because the hourly periodicities aren’t affected by FTE the way all other periodicities are.
Periodicity Conversion

Rate conversion formulas convert amounts to different periodicities for payroll calculations. The following calculations use rate conversion formulas:

- Proration
- Hours multiplied by rates calculation of an element run result
- Rates based on rate definitions

Predefined Periods

The following are the predefined periods for use when setting periodicity.

If these values don’t meet your requirements, you can copy a predefined rate conversion formula and edit its periodicity values.

<table>
<thead>
<tr>
<th>Periodicity</th>
<th>Valid for Payroll Periods</th>
<th>Number of Periods per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annually</td>
<td>Yes</td>
<td>1</td>
</tr>
<tr>
<td>Bimonthly</td>
<td>Yes</td>
<td>6</td>
</tr>
<tr>
<td>Biweekly</td>
<td>Yes</td>
<td>26</td>
</tr>
<tr>
<td>Calendar Monthly</td>
<td>Yes</td>
<td>12</td>
</tr>
<tr>
<td>Daily</td>
<td>No</td>
<td>365</td>
</tr>
<tr>
<td>Hourly</td>
<td>No</td>
<td>2920 (365 days multiplied by 8 hours)</td>
</tr>
<tr>
<td>Lunar Month</td>
<td>Yes</td>
<td>13</td>
</tr>
<tr>
<td>Periodically</td>
<td>No</td>
<td>Payroll frequency determines the number of periods to use in the rate conversion.</td>
</tr>
<tr>
<td>Quarterly</td>
<td>Yes</td>
<td>4</td>
</tr>
<tr>
<td>Semianually</td>
<td>Yes</td>
<td>2</td>
</tr>
<tr>
<td>Semimonthly</td>
<td>Yes</td>
<td>24</td>
</tr>
<tr>
<td>Workday</td>
<td>No</td>
<td>260</td>
</tr>
<tr>
<td>Weekly</td>
<td>Yes</td>
<td>52</td>
</tr>
</tbody>
</table>
### Defining Periodicity

You can define periodicity in the following ways:

<table>
<thead>
<tr>
<th>Object</th>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elements</td>
<td>Manage Elements</td>
<td>The Periodicity input value specifies the frequency of the element value. For example, salary element entries that hold annual salary values have an annual periodicity.</td>
</tr>
<tr>
<td>Payrolls</td>
<td>Manage Payroll Definitions</td>
<td><strong>Period Type</strong> specifies the number of payroll periods. For example, the Monthly Lunar period type includes 13 payroll periods.</td>
</tr>
<tr>
<td>Rates</td>
<td>Manage Rate Definitions</td>
<td>Rate definition can specify the following periodicities:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Return periodicity of the rate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Periodicity of each rate contributor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Periodicity of the calculated sum of the rate contributors</td>
</tr>
</tbody>
</table>

### Rate Conversion Formulas

Rate conversion formulas change the periodicity of an amount.

For example, the Standard Rate Annualized conversion formula can convert an annual salary amount to a weekly amount.

The following table describes the predefined formulas.

<table>
<thead>
<tr>
<th>Rate Conversion Rule</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Rate Annualized</td>
<td>Calculates the annual rate using the input periodicity and converts the amount to an output periodicity and rate.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This rule uses default values, such as 2080 hours or 260 working days, to calculate the annual rate. You select the day or hourly basis during element definition.</td>
<td>To convert a weekly amount to a semimonthly periodicity, the formula:</td>
</tr>
<tr>
<td></td>
<td>1. Multiplies the weekly amount by 52.</td>
<td>1. Multiplies the weekly amount by 52.</td>
</tr>
<tr>
<td></td>
<td>2. Divides the result by 24.</td>
<td>2. Divides the result by 24.</td>
</tr>
<tr>
<td>Standard Rate Daily</td>
<td>Calculates the daily rate using the input periodicity and converts the amount to an output periodicity and rate.</td>
<td>To convert an annual amount to daily periodicity, the formula:</td>
</tr>
<tr>
<td>Rate Conversion Rule</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rate Conversion Rule</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>This rule uses a default value, such as 260</td>
<td>1. Divides the annual amount by 365.</td>
<td>1. Divides the annual amount by 365.</td>
</tr>
<tr>
<td>working days a year, to calculate the daily</td>
<td>2. Multiplies the result by the number of days in the payroll period.</td>
<td>2. Multiplies the result by the number of days in the payroll period.</td>
</tr>
<tr>
<td>working days to calculate the daily rate.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard Working Hours Rate Annualized</td>
<td>Uses the employee’s standard working hours to convert the monetary value</td>
<td>The employee works 40 hours a week with a monthly salary of 1000:</td>
</tr>
<tr>
<td></td>
<td>and working hours to an annual value before calculating the rate.</td>
<td>(1000<em>12)/(40. 00</em>52) = 5.77 an hour</td>
</tr>
<tr>
<td>Assignment Working Hours Rate Annualized</td>
<td>Uses the employee’s working hours to convert the monetary value and working</td>
<td>The employee works 40 hours a week, with 37.5 standard working hours a week, and a monthly salary of 1000:</td>
</tr>
<tr>
<td></td>
<td>working hours to an annual value before calculating the rate.</td>
<td>(1000<em>12)/(37. 50</em>52) = 6.15 an hour</td>
</tr>
<tr>
<td>Periodic Work Schedule Rate Annualized</td>
<td>Uses the employee’s work schedule for the payroll period for daily and</td>
<td>For an employee:</td>
</tr>
<tr>
<td></td>
<td>hourly conversions.</td>
<td>• With a monthly salary of 1000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Assigned a monthly payroll</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The formula checks the work schedule details for the month.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For a daily conversion:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1000 a month/20 days in the month = 50</td>
</tr>
</tbody>
</table>

**Note:** For compensation calculations where the employee is not assigned a payroll, the rate is calculated using the weekly rate calculation. The amount is converted to an annual figure and divided by the number of days or hours in that week based on the work schedule.

The impact of rate conversion rule is summarized below:

**Periodicity:** The conversion rule for periodicity applies to Flat Amount, Hours * Rate, and Days * Rate calculation rules. You can override the periodicity used as the default for the element definition at the element entry level.

**Work Units:** The Work Units conversion rule applies only to flat amount calculation rules for standard and supplemental earnings elements. The selection of which work units to use in reports and payslips determines the conversion calculation. The application creates the element input values using the default values of the rate conversion formulas.

For example, the following table illustrates how the payroll process determines the standard work units for any given pay period:
Proration: The element template includes a new question for proration units. Proration rate conversion rules replace the previous proration methods in the element template. You have greater flexibility, for example, to base proration on calendar days when using work units for conversion.

🔍 **Note:** If the conversion rules do not meet your requirements, you can copy and edit the rules using the Manage Fast Formulas task in the Payroll Calculation work area.

**Related Topics**
- Configure Periodicity Conversion Rules
- Overview of Using Formulas
- Options to Configure Rate Definitions
- Create Conversion Formulas for Proration

### Edit Salaries in the Integrated Workbook

You can edit salary data using an integrated Microsoft Excel workbook. You can edit salaries, but you can’t change the associated salary bases.

#### Download Salaries

You download salaries in the Compensation work area.

1. In the tasks panel tab, click **Download Salaries**.
2. Select the relevant download parameters. Be sure to include the latest salary start date and local currency if you plan to upload your changes.
   
   The currency shown comes from the input value of the payroll element associated with the salary basis.
3. Click **Preview Download** to view the data that matches your download parameters.
4. Click **Prepare in Workbook** to generate the workbook and populate it with the data that matches your download parameters.

#### Edit Salary Data

You can change values in cells with a white background. The workbook adds a symbol in the Changed field to mark the rows where you changed values in one of the white cells. If you enter a new base salary, you also need to enter a new salary start date. Make sure that the new base salary and current base salary are different. Otherwise, you get errors when you upload your changes.
The workbook contains five columns to hold data for up to five active salary components of a salary basis. When you have less than five active salary components, only the column cells for those components have values. If you have more than five active salary components, the workbook includes columns and values for only the first five components.

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

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

Validate Changes
Open the Manage Salaries page, then search for and select a person whose salary you updated.

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

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

To view and resolve an error:

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

Related Topics
- Guidelines for Using Desktop Integrated Excel Workbooks
- What’s the difference between Export to Excel and desktop integration for Excel
- Set Up Desktop Integration for Excel
- Troubleshoot Desktop Integration for Excel

FAQs

What's a salary basis?

The salary basis determines the period in which base pay is expressed, specifies whether salaries can be itemized with components, and identifies any associated grade rate for salary validation. A worker’s salary basis generally remains constant, however it can change. For example:

- A worker changes from an individual contributor to a manager. The salary basis changes from hourly to annual.
• A union contract amendment mandates itemizing a worker’s pay rate. The hourly salary basis that does not use components changes to an hourly salary basis that uses components.

How can I edit multiple salaries at one time?

Use the integrated workbook in the Compensation work area to view and edit salaries for multiple persons. Follow these steps:

1. Use the Export Salaries task to set your export parameters.
2. Click Prepare in Workbook in the Edit Preview section to generate the workbook.
3. Make your edits in the workbook.
4. Upload your changes into the application database.

Why didn't overall salary calculate correctly?

You might have configured one or more rates used by the overall salary rate to enforce a minimum or maximum value. This means that if a rate value is:

• Less than the defined rate minimum, the application applies the minimum value instead
• Greater than the defined rate maximum, the application applies the maximum value instead

Also, the frequency, or periodicity, of rate contributors might be different. For example, the overall salary rate has an annual frequency while a displayed or entered rate has a monthly frequency. The application must convert the monthly frequency to the annual value before adding it to the overall salary.

How can I report on salary rates?

The overall salary amount is available to report on in the current Salary subject area. You must use HCM Extract to report on the breakdown of salary rates.

Before you create an HCM extract, use the Submit a Process and Report task in the Payroll Calculations work area to run the Generate HCM Rates process. The process calculates and stores rates for reporting purposes. Run this process frequently to ensure that the stored rates are current.

Why don't the element entry start and end dates match my salary start and end dates?

The difference occurs because of the Generate HCM Rates process. The process can update salary when a derived rate changes, for example, due to value by criteria. The process creates a salary record, but doesn’t change the primary rate or the corresponding element entry.

Run the Generate HCM Rates process using the Submit a Process and Report task in the Payroll Calculations work area.
How can I extract salary rate values to send to a third-party payroll?

The PAY_RATE_REPORT_VALUES table stores all salary rate values. Use the HCM Extract task in the Setup and Maintenance work area to extract values.

Why do some rates-based salary records display a zero instead of the correct value?

Check the eligibility of the payroll elements using the Manage Elements task in the Compensation work area. The payroll element associated with the rate might have element eligibility defined and the worker might not meet eligibility requirements any longer. We recommend that you define all elements used in salary management with open eligibility.

Why is the element entry for the overall salary rate blank?

Generally, the overall salary is a derived rate and therefore not stored in the element entry. The element entry is just a placeholder. The application stores the overall salary rate and other rate values in the PAY_RATE_REPORT_VALUES table.
Manage Grade Step Progression

You can use grade step progression to move workers automatically from one grade or grade and step to the next level within a grade ladder. The basic process for managing grade step progression is:

1. Create the progression grade ladder and enter general properties.
2. Add grades.
3. Add rules at the ladder, grade, and step level.
4. Run the progression grade ladder process.
5. Review the results and accept the updates.

Complete the perquisites and tasks from the Compensation work area.

Prerequisites

Complete the following tasks before you create the progression grade ladder:

1. Create grades with steps using the Manage Grades task.
2. Add rates to the steps.
3. Define progression rules by creating participant eligibility profiles using the Manage Profiles task.

Create the Ladder and Enter General Properties

Use the Manage Progression Grade Ladder task to complete the following steps:

1. On the Create Progression Grade Ladder page, Progression Ladder tab, select the basic parameters for the ladder.
   
   a. Specify the progression increment, such as grade and steps.
   
   b. Specify the confirmation type.

   This selection determines what actions are available on the Review Proposed Progressions and Salary Updates page after you run the Run Grade Step Progression process.

<table>
<thead>
<tr>
<th>Selection</th>
<th>Action Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>No available actions</td>
</tr>
<tr>
<td>Manual</td>
<td>Accept or reject</td>
</tr>
</tbody>
</table>

   c. Complete any remaining required fields.
2. In the Salary Update Details section, specify whether to include salary updates.
3. Complete any remaining required fields.
Add Grades
To add a grade, follow these steps:

1. On the Create Progression Grade Ladder page, Grades and Steps tab Action menu, select Add Grade.
2. Search and select your grade.
3. Enter the sequence for the place of the grade on the grade ladder.
4. Optionally, click Expand to see any steps you defined for the grade.

Add Rules at the Ladder, Grade, and Step Levels
To add the rules, follow these steps:

1. On the Create Progression Grade Ladder page, Progression Rules tab, add rules that apply to the entire grade ladder.
2. In a grade row, click Grade Rules.
3. Add the rules that apply to the grade.
4. For each step, add the rules that apply.
5. Save and close to return to the Progression Rules tab.
6. Repeat steps 2 through 5 to add rules to the remaining grades in the ladder.

Run the Progression Grade Ladder Process
Use the Run Grade Step Progression task to select the grade ladder and run the process. Note the Process ID.

Review the Results and Accept the Updates
Use the Review Proposed Progressions and Salary Updates task to complete the following steps:

1. Search for and select your Process ID.
2. On the Results page Progressions and Salary Updates tab, view proposed worker progressions and salary updates and the status of each proposal.

Progression Grade Ladders
Progression grade ladders are hierarchies used to group grades and steps and define their sequence. They include the associated progression rules and rates for each grade and step within the ladders. You define progression grade ladders using the Manage Progression Grade Ladders task in the Compensation work area.

Parameters of progression grade ladders are:

- General parameters
- Grades and steps
- Progression rules

General Parameters
You define parameters for the progression process, such as the grade set, progression increment, and confirmation type.
Confirmation types specify how the **Run Grade Step Progression** and **Synchronize Grade Step Rates** processes apply proposed progressions and salary updates. Confirmation types are **Manual** or **Automatic**.

The **Include Salary Updates** selection determines how the **Run Grade Step Progression** process updates the worker assignment and salary records. Select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>What Gets Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Grade or step value on the assignment record</td>
</tr>
<tr>
<td></td>
<td>Salary record with the associated rate from the grade or step</td>
</tr>
<tr>
<td>No</td>
<td>Grade or step value on the assignment, but not the salary amount</td>
</tr>
</tbody>
</table>

For example, if you select **Yes**, then the **Run Grade Step Progression** process populates the salary record with the corresponding grade or step rate from the worker’s grade ladder. This action applies to every employment transaction that changes the worker’s grader ladder, grade, or step, such as when hiring, transferring, or promoting a worker.

**Grades and Steps**

You define grades using the **Manage Grades** task and then add them to the ladder on the Grades and Steps tab. You enter the rates for your grades or steps and specify the sequence for each grade.

**Progression Rules**

You can associate **progression rules** at the ladder, grade, and step levels. You define progression rules using the **Manage Eligibility Profiles** task. The best practice is to associate at least one rule at each level. Absence of a rule indicates that all workers on the grade ladder are eligible for that grade or step.

**Related Topics**

- How You Populate the Grade Ladder with Salary Info
- Salary Basis Types

**Progression Grade Ladder Confirmation Types**

When you create a **progression grade ladder** you use confirmation types to specify how the **Run Grade Step Progression** and **Synchronize Grade Step Rates** processes apply proposed progressions and salary updates. You view the process results on the Review Proposed Progressions and Salary Updates page. View any unapplied progressions and updates and corresponding reasons on the Errors tab of the page. Confirmation types are **Manual** or **Automatic**.

**Manual**

You can decide to accept or reject the proposed progressions and salary updates for individual workers or a group of workers. Accepting a proposed progression and salary update immediately applies the changes to the worker’s assignment and salary records.
Automatic
The process automatically applies the proposed progressions and salary updates to the worker’s assignment and salary records. You can review the updates, but you can’t take any action.

Examples of Applying Progression Rules
You can use progression rules to enable or restrict progression between grades and steps. You associate the rules with progression grade ladders using the Manage Progression Rules tab of the Create or Edit Progression Grade Ladder page. You define the rules using the Manage Eligibility Profiles task. For progression rules, create participant profiles with either Global or Compensation profile usage.

The following scenarios show at what level you apply various rules to enable or restrict progression by:

- Time at certain grades and steps
- Performance rating level
- Ineligible for progression due to rule

Time at Certain Grades and Steps
You want factory workers to progress automatically through steps. You create a grade ladder with step-level rules that define how much time must elapse between progressions. The following table shows how you apply rules within the ladder.

<table>
<thead>
<tr>
<th>Position</th>
<th>Example Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Ladder</td>
<td>Active Workers Only</td>
</tr>
<tr>
<td>Grade</td>
<td>Job Assembly II</td>
</tr>
<tr>
<td>Step 1</td>
<td>Six Months in a Step</td>
</tr>
<tr>
<td>Step 2</td>
<td>Six Months in a Step</td>
</tr>
<tr>
<td>Step 3</td>
<td>Six Months in a Step</td>
</tr>
</tbody>
</table>

Performance Rating Level
You want administrative workers to progress to the next grade level only if their performance evaluation meets or exceeds expectations. You create a grade ladder where the final step for each grade includes a progression rule that evaluates worker performance. The following table shows how you apply rules within the ladder.
### Position | Example Rule
---|---
Grade Ladder | Active Workers Only
Grade | Administrative Clerk I
Step 1 | Six Months in a Step
Step 2 | Six Months in a Step
Step 3 | Six Months in a Step
Meets or Exceeds Evaluation

### Ineligible to Progress Due to Rule

You want programmers to not progress to the next step level unless they have received a technical certificate. You create a grade ladder that requires a certificate to proceed to the next step. The following table shows how you apply rules within the ladder.

<table>
<thead>
<tr>
<th>Position</th>
<th>Example Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Ladder</td>
<td>Active Workers Only</td>
</tr>
<tr>
<td>Grade</td>
<td>Programmer III</td>
</tr>
<tr>
<td>Step 1</td>
<td>Java SE Fundamentals Certificate</td>
</tr>
<tr>
<td>Step 2</td>
<td>Java SE Advanced Certificate</td>
</tr>
<tr>
<td>Step 3</td>
<td>Java SE Optimization Certificate</td>
</tr>
</tbody>
</table>

### Related Topics
- Eligibility Profiles

### Proposed Progression and Salary Updates

After you submit a Run Grade Step Progression or Synchronize Grade Step Rates process, you can review the update on the Review Proposed Progressions and Salary Updates page. The page displays workers with proposed progressions and indicates the status of the transactions.
Statutes
The following table describes each transaction status:

<table>
<thead>
<tr>
<th>Transaction Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted</td>
<td>The process applied the proposed progressions and salary updates to the assignment and salary records. You can't change this status.</td>
</tr>
<tr>
<td>Not Processed</td>
<td>The process evaluated the progression and determined that the worker is eligible to move to the new grade or step. The progression is proposed but not yet accepted or rejected.</td>
</tr>
<tr>
<td>Failed</td>
<td>The service that was writing the update to the assignment or salary record encountered a problem. You can try again to accept the update by manually clicking Accept.</td>
</tr>
<tr>
<td>Suspended</td>
<td>Older batch process runs that contain rows that were in Not Processed status when a subsequent process was run have this processing status. You can no longer act on these rows in the older run.</td>
</tr>
<tr>
<td>Rejected</td>
<td>Someone stopped the process from applying the proposed updates to the worker’s records. For example, you might reject a proposed progression and manually adjust the progression because the worker is eligible for multiple steps within a grade.</td>
</tr>
</tbody>
</table>

Actions
Actions are available only if the progression grade ladder or rate synchronization confirmation type is Manual.

You can accept the updates for workers individually or as a group. Accepting a proposed progression and salary update immediately applies the following for the selected workers:

- A new grade or step to the worker’s assignment
- A new salary amount to the worker’s salary record

You can reject proposed progressions and salary updates for workers individually or as a group. If you reject a proposal and then change your mind, you can undo the action and set the proposal back to not processed.

You can also reject proposed progressions and salary updates for selected workers within a group, and then accept updates for the remaining workers.

Grade Step Progression Processing
Grade step progression has two batch processes. Use these processes to update workers’ assignment and salary records, based on rates and rules associated with a progression grade ladder. Aspects of the grade step progression processing are:

- Run grade step progression process
- Synchronize grade step rates process
- Assignment and salary actions
- Error handing
Run Grade Step Progression Process

The **Run Grade Step Progression** process runs for the specified progression grade ladder. The process determines if the assignments associated with the progression grade ladder are eligible for these changes:

- The new grade or step
- The associated salary changes

The process makes the determination by evaluating each assignment associated with the grade ladder. The process uses the eligibility criteria in the progression rules for the higher steps and grades. If the process determines that the assignment meets the eligibility criteria, then the assignment is eligible to progress to that grade or step.

Synchronize Grade Step Rates Process

The **Synchronize Grade Step Rates** process updates workers’ salary records when the underlying rates for the grades or steps changed. The process propagates the new rates to the existing salary records for all workers whose assignments are currently associated with the progression grade ladder.

Assignment and Salary Actions

When you define a progression grade ladder, you must specify the assignment action. When you configure the **Run Grade Step Progression** process parameters, you can optionally specify the assignment action. When you configure the **Run Grade Step Progression** and **Synchronize Grade Step Rates** processes, you can optionally specify the salary action. This table summarizes where you can set these parameters and identifies any default values:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Progression Grade Ladder Definition</th>
<th>Run Grade Step Progression Process</th>
<th>Synchronize Grade Step Rates Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Action</td>
<td>Yes, required</td>
<td>Yes</td>
<td>NA</td>
</tr>
<tr>
<td>Salary Action</td>
<td>NA</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Error Handling

Sometimes a process finds an error and can’t determine the correct update. The errors appear on the Review Proposed Progressions and Salary Updates page. You handle the transactions with errors outside of the grade step progression process.

Some examples of errors include:

- The progression grade ladder currency is different from salary basis currency
- The proposed salary isn’t greater than the current salary
• The salary basis is not defined as determined by user
• A future-dated assignment exists
• A current or future-dated salary record exists (Run Grade Step Progression process only)
• A step update already exists on the same date (Run Grade Step Progression process only)

Results
The process converts the salary from the progression grade ladder frequency to the salary basis frequency, if necessary. The transaction date parameters on the Progression Grade Ladder page determine the effective date of the proposed assignment and salary records.

<table>
<thead>
<tr>
<th>Grade Ladder Attribute</th>
<th>Batch Process</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progression Grade Ladder Transaction Date</td>
<td>Run Grade Step Progression</td>
<td>Assignment effective date</td>
</tr>
<tr>
<td>Salary Update Transaction Date</td>
<td>Run Grade Step Progression</td>
<td>Salary effective date</td>
</tr>
<tr>
<td>Rate Synchronization Transaction Date</td>
<td>Synchronize Grade Step Rates</td>
<td>Salary effective date</td>
</tr>
</tbody>
</table>

Related Topics
• How Action Components Work Together

Examples of Grade Step Progression Processing
You use two batch processes to update workers’ assignment and salary records, based on rates and rules associated with a progression grade ladder. The following scenarios show how various progression grade ladder and process detail configurations affect processing results.

How the Run Grade Step Progression Process Determines Eligibility
Scenario: A worker is on the Midwest Hourly progression grade ladder Grade A Step 1. The ladder has five grades: A, B, C, D, and E. Each grade has four steps.

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

• If there is more than one progression rule associated with a single grade or step, the worker must meet the criteria in all progression rules, not just one.
• If a grade or step doesn’t have an associated eligibility profile, then all assignments are eligible to progress to that grade or step. It’s important to include progression rules for all steps (for grades with steps) and all grades (for grades without steps).
• If an assignment meets the criteria for more than one grade or step, the proposal is to move the worker to the lowest of the eligible steps. You see a warning message when you review the processing results.
The process doesn't explicitly use ceiling steps. You can use this within your own progression rules to determine if the worker should automatically move above the ceiling.

How the Synchronize Grade Step Rates Process Updates Salary with New Progression Grade Ladder Rates

Scenario: A worker is on the Midwest Hourly progression grade ladder, Grade A, Step 4 as of the hire date. The salary for this step is 30 USD per hour. On January 1, 2018, the rates for Midwest Hourly ladder increased and now Step 4 has a rate of 35 USD per hour.

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

FAQs

Can I delete a progression grade ladder?

Yes, if you haven't associated any workers with the ladder.
5 Manage Individual Compensation

Overview of Individual Compensation Management

Award variable compensation to individual workers outside of the regular compensation cycle, such as a spot bonus, education reimbursement, or car allowance. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes.

They can:

- Award ad hoc bonuses, allowances, and other compensation.
- Initiate and update recurring payments.
- View a worker’s compensation history to help determine if an award is deserved and to view past award amounts.

To manage Individual compensation, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Manager</td>
<td>My Dashboard - Manager Resources</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Client Groups - Compensation</td>
</tr>
<tr>
<td>HR Specialist</td>
<td>My Client Groups - Person Management</td>
</tr>
</tbody>
</table>

Examples of Salary Growth Rate Calculations

The following examples show how the application calculates the average annual salary growth rate and the cumulative salary growth rate. The examples show calculations over three and five year periods. This information appears in compensation history and in salary analytics.

Scenario

The following table shows the salary change information for both examples.

<table>
<thead>
<tr>
<th>Year</th>
<th>Starting Salary</th>
<th>Ending Salary</th>
<th>Annual Growth Rate</th>
<th>Three Year Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>38,000</td>
<td>41,000</td>
<td>7.89</td>
<td>NA</td>
</tr>
<tr>
<td>2011</td>
<td>41,000</td>
<td>43,000</td>
<td>4.88</td>
<td>NA</td>
</tr>
</tbody>
</table>
### Average Annual Growth Rate

Average annual growth rate is the statistical average of the total percentage increase from January to December of each full year. To calculate this average, the application sums the annual growth rate of all the years in the calculation period and divides by the number of years.

The following table shows the calculation using the scenario data.

<table>
<thead>
<tr>
<th>Period</th>
<th>Average Annual Growth Rate</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three year</td>
<td>8.05</td>
<td>(13.95 + 10.20 + 0.00) / 3 = 8.05</td>
</tr>
<tr>
<td>Five year</td>
<td>7.38</td>
<td>(7.89 + 4.88 + 13.95 + 10.20 + 0.00) / 5 = 7.38</td>
</tr>
</tbody>
</table>

### Cumulative Growth Rate

Cumulative growth rate is the total percentage of salary change over the period. To calculate the cumulative rate, the application:

1. Determines the amount of the salary increase for the period by subtracting the period starting salary from the period ending salary
2. Calculates the cumulative rate by dividing the salary increase amount by the starting salary

The following table shows the calculation using the scenario data.

<table>
<thead>
<tr>
<th>Period</th>
<th>Cumulative Growth Rate</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three year</td>
<td>25.58</td>
<td>(54,000 - 43,000) / 43,000 = 25.58</td>
</tr>
<tr>
<td>Five year</td>
<td>42.10</td>
<td>(54,000 - 38,000) / 38,000 = 42.10</td>
</tr>
</tbody>
</table>
FAQs

What's the difference between Other Compensation and Prior Compensation sections?

The Other Compensation section on the Manage Compensation page includes all current individual compensation awards for a worker, including active recurring plans. Current awards are those whose effective end dates are greater than or equal to the current date.

The Prior Compensation section shows up to five years of previous compensation. Recurring awards appear as prior compensation when their end date is earlier than the current date. These plans are view-only.

Why does the history displayed on the Manage Compensation page differ from what I see in compensation history?

The Prior Compensation section on the Manage Compensation page shows the full individual compensation history for a worker for the past five years. Compensation history includes only individual compensation for the payroll elements that you add to the Manage Compensation History page.
6 Manage Personal Information and Contributions

Overview of Personal Info and Contribution Management

View your compensation information and manage your enrollments and contributions for company-sponsored savings and charitable plans using the Me > Personal Information work area. Use the Compensation tab to:

- View information about your salary and any company stock grants.
- Open total compensation statements, which consolidate your compensation information for easy review and printing. The type of information that statements contain varies depending on how your company configures compensation. Not all users can view compensation statements.

Use the Compensation tab on the More Information dialog box to complete the following tasks. To open the dialog box, click the More Information icon on your image:

- Manage personal contributions
- View total compensation statements

View My Compensation Information

Video

Watch: This tutorial shows you how to view your personal compensation information. The content of this video is also covered in text topics.

Topic

Perform the following steps to view your compensation information.

1. On the Home page, click Me, Personal Information to open the My Details page.
2. On the panel tab, click Compensation to open the Salary page.
   This page shows you salary information, such as your annual salary, salary range, and last salary change date and percentage.
3. Click Total Compensation Statement to open the printable Total Compensation Statement.
   The Summary section shows details of your compensation, such as cash compensation and benefits.
4. Click Cash Compensation.
   The graphs and details can display information such as annual salary, bonuses, or commissions.
5. Click Benefits.
You can see all the benefits in which you are enrolled and the distribution between your contributions and the company contributions.

6. Click View Printable Statement to print the compensation statement.

Note the type of compensation information that appears varies depending on how your company configures compensation. Not all users can view compensation statements.
7 Manage Compensation Surveys

Import Market Data in the Integrated Workbook

You can enter and edit market survey data and upload it into the application using an integrated Microsoft Excel workbook. Before importing market data, you need to create any missing compensation types. Also add the survey supplier name and contact information.

Create the Import Template

In the Compensation work area, use the seven market data workbooks to import market data. Create the initial market data survey objects in the following order using the Manage Supplier Surveys task:

1. On the Manage Survey Job Structures page, click **Create Import Template** and select one of the five templates.
   - You can import the job functions, job families, career streams or bands, career levels, and other levels in any order.
2. On the Manage Survey Job List page, click **Create Import Template**.
3. On the Import Survey page, create the template to import your survey.
   - You can also use the import survey template to change an existing survey. Changes can include loading new job structures and changing existing ones.

Enter Market Data

Copy the relevant job structures, job list, or survey data from the reports provided by the supplier and paste them into the workbook. The workbook add a symbol in the **Changed** field to mark the rows that you added.

The upload process expects only one supplier code, survey code, or combination of supplier and survey codes per template. If you have multiple codes, create a separate template for each one.

⚠️ **Caution:** Don’t delete or reorder template columns. The upload process might fail.

Upload Market Data

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

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

Validate Changes

To validate the changes:

1. View the new or changed data using the **Manage Supplier Structures** task. With this task, you can open the Manage Survey Job Structures or Manage Survey Job List page.
2. Refresh the page to see the newly imported survey using the **Import Survey** task. Click the survey name to open the Imported Survey Data page.

**Resolve Errors**

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

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

To view and resolve an error:

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

**Related Topics**

- Set Up Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Troubleshoot Desktop Integration for Excel
8 Allocate Budgets

Overview of Manage Compensation Budgets

You can keep compensation awards in line with your company's financial goals and targets by ensuring that manager allocations stay within defined budget amounts.

Compensation managers can:

- Publish budgets to line managers to either:
  - Distribute budgets down the reporting hierarchy
  - Allocate budget amounts at the worker level
- Enable managers to award compensation within their allocated budget amounts by automatically publishing budget amounts

Line managers can:

- Manually calculate budget amounts
- automatically determine budget amounts using a model
- Determine budget amounts offline by downloading budget details to a spreadsheet

To manage compensation budgets, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Manager</td>
<td>My Team - Workforce Compensation</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Team - Workforce Compensation</td>
</tr>
<tr>
<td></td>
<td>Compensation</td>
</tr>
</tbody>
</table>

Manage Compensation Budgets

Video

Watch: This tutorial shows you how to manage your compensation budgets during the compensation cycle. The content of this video is also covered in text topics.
Topic

Tasks for Managing Compensation Budgets include:

- Allocate budgets to managers and workers
- View the audit trail
- Publish the budgets

In this case, you’re signed in as Henry Jones a manager.

Allocating Budgets to Managers and Workers

1. Click **My Team**.
2. Click **Workforce Compensation**.
3. Click the **1 of 14** link to open the Primary Managed Plans dialog box.
4. Click **Simple Merit and Bonus 2018**.
5. In the Tasks section, click **Manage Budgets**.
6. Select **Simple Bonus Budget 2018**.

   As your Budget Method is All managers, you can view all the managers who report directly to you. You can also expand each one so that you can view all the managers who report to your direct managers. You can then allocate budgets to yourself and all the managers below you.

7. Click to expand the **Brown, Julie** row to see all managers who report to Julie Brown.
8. Click the **Actions** list to view the available actions.

   The available actions depend on how compensation has been implemented.

9. In the **Direct Reports** row, click the **Worker List** icon.

   You can also view all the workers who report directly to you so that you can allocate a budget to yourself or your direct reports. Use the **Actions** list to export the data of all workers or direct reports to Excel, or change their bonus eligibility status. If the budget pool is set up to use worker-level budgeting, you can allocate budgets to each worker.

10. Click **Done**.

Viewing the Audit Trail

1. Click the **Actions** list and select **View Audit Trail**.

   You can look at the audit trail and see changes to your budget or a selected manager’s budget.

2. Click the **Export** list and select **Export with Ability to Import**.

   You can make changes to this budget on this page, or export data to an Excel spreadsheet, change the data, and then upload the revised information to the budget sheet.

3. In the **Brown, Julie** row, click **Budget Distribution Percentage** field.

4. Enter **9**.

   You can enter a budget amount or percentage for each manager. In this case, you’re increasing the budget to 9 percent.

5. Press **TAB** to see the recalculated budget amount.
Publishing the Budgets

1. Click the **Publish** list.
   
   You can publish budgets to selected managers or to all managers. You can also withdraw previously published budgets to make changes to them. In this case, you can publish the budgets.

2. Select **Publish All Budgets**.

3. You can optionally enter comments to your managers, who receive a notification that budgets have been published to them.

4. Click **Submit**.

5. Click **OK**.

6. Click **Save and Close**.

   After the budgets are published, managers can begin allocating compensation to workers.

Budget Publishing

You publish your budget directly to your managers if you use manager-level budgeting and have at least one lower-level manager. The managers continue to push the budget down the hierarchy or they allocate compensation to their managers or workers. To make changes after publishing, you must withdraw or republish the budget. Publish, withdraw, or republish your budget by one of two methods:

- All managers
- Selected managers

**All Managers**

All managers receive their own budgets to manage. If they have lower level managers, they publish the budget to their managers. If they don’t have reporting managers, they allocate compensation directly to their workers.

**Selected Managers**

Only the managers you select receive a budget. The selected managers manage their own budgets.

**Note:** You can combine both methods. For example, one manager you select receives a budget now. Later, you publish the remaining budget to the remaining managers.

Budget Initiation

You can distribute initial budgets for one or more managers in the hierarchy three ways: Initiate budgets manually, run the Start Compensation Cycle process, or use a model to distribute budgets. When a budget is zero or null, managers have read-only access to their budgets. A null budget contains no value. A zero budget means no amount is budgeted.
Initiate Budgets Manually

You can initiate budgets manually on the Budget Pools page by:

- Switching to the manager whose budget you want to initiate
- Clicking the Adjust Budgets button

You can initiate budgets for the first time or adjust budgets previously initiated for a selected manager. The budget amount can be a flat amount or a percentage of total eligible salaries. The selected manager receives the budget amount you initiated or modified.

Run the Start Compensation Cycle Process

When you create a budget pool you can select to automatically publish budgets. The Start Compensation Cycle process distributes budget amounts or budget percentages based on the default values you configured for the following columns on the Configure Budget Page Layout page:

- **Budget Distribution Amount** or **Budget Distribution Percentage** columns on the **Detail Table** tab
- **Budget Amount** or **Budget Percentage** columns on the **Summary Columns** tab
- **Budget Amount** or **Budget Percentage** columns on the **Worker List** tab for worker level budgeting

The following table shows how the Start Compensation Cycle process distributes budgets when budgets are automatically distributed:

<table>
<thead>
<tr>
<th>Budgeting Method</th>
<th>Budget Distributed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager level budgeting</td>
<td>As amounts to all managers with at least one lower level manager under them.</td>
</tr>
<tr>
<td>Worker level budgeting</td>
<td>As amounts or percentages at the worker level. The manager level budgets are the sum of the individual worker budgets.</td>
</tr>
</tbody>
</table>

Use a Model to Distribute Budgets

You can build a model or use an existing model to distribute budget amounts for the first time based on the model criteria. On the Preview Model Results page, you apply the results as budget amounts to all managers in the model population.

Budget Pool Storage Methods

When you set up a compensation budget pool, you select a method to store the budget using the Create or Edit Budget Pool dialog box. The budget method affects the published budgets when you reassign workers or their eligibility changes. You can store your budget by one of two methods:

- Percentages
- Amounts
Percentages

When you store budgets as percentages, the published budgets change when a manager’s total eligible salary changes, such as when you reassign workers or their eligibility changes. For example, you publish a budget to David as ten percent of total eligible salary. David publishes budget percentages for himself and his direct reports as follows:

<table>
<thead>
<tr>
<th>Manager</th>
<th>Total Eligible Salary (USD)</th>
<th>Stored Budget Percentage</th>
<th>Calculated Budget Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>David</td>
<td>100,000</td>
<td>10</td>
<td>10,000</td>
</tr>
<tr>
<td>Rosa</td>
<td>500,000</td>
<td>10</td>
<td>50,000</td>
</tr>
<tr>
<td>Lee</td>
<td>400,000</td>
<td>10</td>
<td>40,000</td>
</tr>
<tr>
<td>Total</td>
<td>1,000,000</td>
<td></td>
<td>100,000</td>
</tr>
</tbody>
</table>

You reassign one of Lee’s workers with an eligible salary of 100,000 to Rosa. Now Lee’s total eligible salary decreases and Rosa’s increases, affecting their calculated budget amount as follows:

<table>
<thead>
<tr>
<th>Manager</th>
<th>Total Eligible Salary (USD)</th>
<th>Stored Budget Percentage</th>
<th>Calculated Budget Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>David</td>
<td>100,000</td>
<td>10</td>
<td>10,000</td>
</tr>
<tr>
<td>Rosa</td>
<td>600,000</td>
<td>10</td>
<td>60,000</td>
</tr>
<tr>
<td>Lee</td>
<td>300,000</td>
<td>10</td>
<td>30,000</td>
</tr>
<tr>
<td>Total</td>
<td>1,000,000</td>
<td></td>
<td>100,000</td>
</tr>
</tbody>
</table>

Amounts

When you store budgets as amounts, the published amounts stay with the manager when you reassign workers or their eligibility changes. For example, you publish a 100,000 budget to David, a higher-level manager. David publishes budgets for himself and his direct reports, Rosa and Lee, as follows:

<table>
<thead>
<tr>
<th>Manager</th>
<th>Total Eligible Salary (USD)</th>
<th>Stored Budget Amount (USD)</th>
<th>Calculated Budget Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>David</td>
<td>100,000</td>
<td>10,000</td>
<td>10</td>
</tr>
<tr>
<td>Rosa</td>
<td>500,000</td>
<td>50,000</td>
<td>10</td>
</tr>
<tr>
<td>Lee</td>
<td>400,000</td>
<td>40,000</td>
<td>10</td>
</tr>
</tbody>
</table>
Allocate Budgets

<table>
<thead>
<tr>
<th>Manager</th>
<th>Total Eligible Salary (USD)</th>
<th>Stored Budget Amount (USD)</th>
<th>Calculated Budget Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>1,000,000</td>
<td>100,000</td>
<td></td>
</tr>
<tr>
<td>David</td>
<td>100,000</td>
<td>10,000</td>
<td>10</td>
</tr>
<tr>
<td>Rosa</td>
<td>600,000</td>
<td>50,000</td>
<td>8.3</td>
</tr>
<tr>
<td>Lee</td>
<td>300,000</td>
<td>40,000</td>
<td>13.3</td>
</tr>
<tr>
<td>Total</td>
<td>1,000,000</td>
<td>100,000</td>
<td></td>
</tr>
</tbody>
</table>

You reassign one of Lee’s workers with an eligible salary of 100,000 to Rosa. Because the budget storage method for the budget pool is Amount the calculations are as shown in this table:

How You Track Off-Cycle Compensation Against a Budget

Associate a workforce compensation plan budget pool with the individual compensation plan.

1. Minimally set up the workforce compensation plan using the Manage Plans task.
   a. Create the workforce compensation plan.
   b. Configure the workforce compensation plan details.
   c. Configure the workforce compensation budget pool.
   d. Create at least one worksheet compensation component and associate the budget pool with it.
   e. Run the Start Compensation Cycle process.

2. After you start the compensation cycle, associate the budget pool with an individual compensation plan option on the Create or Edit Option dialog box.

You can proxy to the Workforce Compensation work area from the Compensation work area. There you can manually give a budget to someone or use the Budget Pools page to distribute budgets to multiple managers. You can also automatically publish budgets, just as you do for a standard compensation cycle.

Allocation Methods

The allocation method determines how a model calculates budget or compensation amounts and target amounts or ranges for a given worker population. It influences how you apply the model results. The allocation methods available depend upon how the plan is set up. The allocation method you select lets you model amounts by:

- Bringing workers up to a specific compa-ratio or quartile
- Supplying a numeric or text value to a user-defined column
- Supplying a target range or percentage
• Allocating by a specified amount or percentage
• Increasing by a specified amount or percentage

Bringing Workers Up to a Specific Compa-Ratio or Quartile
Increase all workers' budget or compensation amounts by specific criteria. For example:

- Bring all workers in the US whose compa-ratio is less than 80 to a compa-ratio of 100
- Bring all workers in the UK in the Operations department to the third quartile

Supplying a Numeric or Text Value to a User-Defined Column
Enter a numeric or text value in a specific user-defined column. For example:

- Rename user defined numeric column 16 to Corporate Modifier and display:
  - 02 for all workers in the US with a target of 80 percent or higher
  - 05 for all workers in Canada with target of 80 percent or higher
- Rename user-defined text column 1 to Sanity Check and display Verify Salary for all workers whose:
  - Performance rating is high
  - Compa-ratio is less than 80

Supplying a Target Range or Percentage
Define a target range using a flat amount or percentage. For example, define a target bonus range of 3,000 to 5,000 USD for workers in the US who have a job title of Analyst and a grade of 3.

Allocate By a Specified Amount or Percentage
Allocate compensation by a flat amount or percentage. For example, allocate bonuses as follows:

- US workers with an outstanding performance rating a Bonus of 5,000 USD
- UK workers with an average performance rating a Bonus of 2,500 GBP

Increase By a Specified Amount or Percentage
Increase already allocated amounts by a flat amount or percentage of eligible salary. For example, give all workers in France an additional one percent of eligible salary on top of the compensation already allocated to them. To decrease a budget, enter a negative number or percentage.

Budget Funding Level Options
When you use a model to distribute budgets to your managers, you must specify the level of management to which the budget amounts apply. You fund budgets by one of three methods.
Budget Funding

The following table shows the three funding levels and how they distribute budgets.

<table>
<thead>
<tr>
<th>Funding Level</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Managers</td>
<td>Only top level managers who have no manager above them</td>
</tr>
<tr>
<td>Managers One Level Down</td>
<td>Managers one level away from the highest manager in the hierarchy</td>
</tr>
<tr>
<td>All Managers</td>
<td>All managers</td>
</tr>
</tbody>
</table>

Video

Creating Compensation Models

Watch: This tutorial shows you how to set up and use compensation models. The content of this video is also covered in text topics.

Topic

This example shows how to create and preview a performance management salary compensation model. The model allocates a percentage of eligible salary based on job and performance rating, excludes one worker from the model, and applies the results to the budget sheet.

Task Summary

To create the compensation model, complete the following tasks:

1. Create a compensation model.
2. Apply the model to budget sheet.

Use the default values except where otherwise indicated.

Prerequisites

1. Create a workforce compensation plan.
2. Enable modeling.
3. Enable performance ratings.
4. Set up the following rating scales:
   - Rating 1 equals Meets Expectation
   - Rating 2 equals Exceeds Expectations
Creating a Model

1. On the home page, click My Team > Workforce Compensation.
2. In the Workforce Compensation work area, select your plan.
3. Click Manage Models.
4. On the Manage Models page, click Create.
   a. On the Create Model dialog box, enter a model name and select a component.
   b. Click Continue.
5. On the Create Model: Define Model page, configure the performance management salary compensation model.
   a. Complete the fields, as shown in this table, if not already selected.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation Method</td>
<td>Allocate n percent of eligible salary</td>
</tr>
<tr>
<td>Model Access</td>
<td>Limit model access to model creator</td>
</tr>
<tr>
<td>Criteria 1</td>
<td>Job</td>
</tr>
<tr>
<td>Criteria 2</td>
<td>Performance Rating</td>
</tr>
</tbody>
</table>

   b. Click Next.
6. On the Create Model: Select Workers page, specify whom to include and exclude from the performance management salary compensation model.
   a. In the Show field, select Show managers.
   b. In the Include column, deselect Elizabeth Mavery.
   c. On the Exclude Workers dialog box, exclude subordinates.
      i. Select Also exclude subordinates.
      ii. Click OK.
   d. On the Create Model: Select Workers page, finish excluding workers.
      i. Click Exclude Workers Shown.
      ii. Click Next.
7. On the Create Model: Enter Values page, configure the percentages of eligible salary.
   a. In the Percentage of Eligible Salary column, complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Percentage of Eligible Salary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyst - 3, Meets Expectations</td>
<td>3</td>
</tr>
<tr>
<td>Analyst - 4, Exceeds Expectations</td>
<td>4</td>
</tr>
<tr>
<td>Analyst - 5, Outstanding</td>
<td>5</td>
</tr>
</tbody>
</table>

   b. Click Next.
8. On the Create Model: Select Purpose page, specify the purpose of the performance management salary compensation model.
   a. Select **Apply as Budget Amounts**, if not already selected.
   b. Click **Next**.

9. On the Create Model: Review Results page:
   a. View the model results.
   b. Click **Next**.

**Applying Model Results**

1. On the Create Model: Apply page, select **Overwrite existing budgets**, if not already selected.
2. Click **Save and Apply**.
3. On the Warning dialog box, click **Yes**.
4. On the Confirmation dialog box, click **Done**.
5. On the Manage Models page, click **Done**.

**Considerations for Applying Model Results**

After you create a model and preview model results, you apply the results to the worksheet or budget sheet. You replace the existing amounts or supply a target amount or range by applying the model results in one of four ways:

- Apply as budget amounts
- Apply as compensation amounts on the worksheet
- Apply to target amounts
- Apply to target ranges

**Apply as Budget Amounts or Compensation Amounts**

Replace the existing worksheet or budget sheet amounts with the model budget or compensation amounts. You increase the existing amounts if you use one of the following **allocation methods** that you enable during setup:

- Increase amount by n percent
- Increase n amount per person
- Increase n percent of eligible salary

**Apply as Target Amounts or Target Ranges**

Supply a target amount or range for managers to use as a guideline when determining allocations for their workers. For example:

1. Create a model to determine budget target ranges based on length of service and performance rating for an annual bonus plan.
2. Enter different ranges for workers who meet different combinations of length of service and performance rating.
3. Apply the model as target ranges.

**FAQs**
What happens if a manager receives a zero or no budget?

The manager has read-only access and the available budget changes as follows:

- If there is no budget, then there is no available budget.
- If the budget is zero, then no amount is budgeted. The available budget becomes negative when you make allocations.
9 Compensate Workforce

Overview of Manage Workforce Compensation

Managers allocate one or more types of compensation manually or automatically for a group of workers on a focal, anniversary, or periodic basis. Compensation administrators process and transfer approved data to workers' HR records. Line managers perform the following tasks:

- Allocate compensation.
- Promote and rate worker performance while allocating compensation.
- Determine compensation amounts offline by downloading details to a spreadsheet.
- Use a model to automatically calculate and allocate compensation to workers based on selected criteria.
- Generate company-configured compensation change statements to notify workers of a compensation award, job change, or performance rating assignment.
- Analyze proposed changes for equity among peer groups and by manager, alignment with the market, and pay for performance strategies.
- Review and approve work of subordinate manager.

Compensation managers can also perform these tasks for oversight, to override, and to act as a proxy.

To manage workforce compensation, start from the following work areas:

<table>
<thead>
<tr>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Manager</td>
<td>My Team - Workforce Compensation</td>
</tr>
<tr>
<td>Compensation Manager</td>
<td>My Team - Workforce Compensation</td>
</tr>
<tr>
<td></td>
<td>Compensation</td>
</tr>
<tr>
<td>Compensation Administrator</td>
<td>Compensation</td>
</tr>
</tbody>
</table>

Allocate Compensation

Video

Watch: This tutorial shows the steps you can take to manage periodic compensation reviews and award compensation to groups of workers. The content of this video is also covered in text topics.
Topic

Tasks for allocating compensation include:

- View compensation plans
- View the worksheet
- Award a bonus

Viewing Compensation Plans

View the compensation plans that are available to you and action history for a plan.

1. On the Home page, click My Team, Workforce Compensation to open the landing page.
2. Click the 1 of 18 link to open the plans dialog box.
   You can see all of the compensation plans that you have access to.
   Primary Managed Plans are plans in which you have responsibility for submitting the allocation for approval. You can’t submit Secondary Managed Plans and Other Plans for Review for approval.
   Depending on how the plan is set up, you can provide input to another manager or you may just be able to view the plan.
4. Click Action History to open the action history dialog box.
   You not only see what plans are assigned to you, you can also see your access, the status, and approvals. You have a budget assigned to you and the current status is Work in progress. You can take action on your plan or submit the plan for approval.
5. Close the dialog box to return to the landing page.

Compensation plans are configurable. The compensation department has set up this plan with tasks to guide you through this process.

Viewing the Worksheet

View summary analytics, actions you can take on the worksheet, filter your worksheet, and view alerts.

1. Click Reward.
   On the Reward page, you can allocate salary, bonus and stock. The total values for the organization are displayed in the Scoreboard View. You can also switch to the Analytic View to see this information in a more visual format.
2. Click Analytic View.
3. Click Scoreboard View.
4. Click Actions
   There are several actions you can take, such as changing a worker’s eligibility or reassigning a worker to another worksheet manager.
5. Close the Actions menu.
   You can see all the information made available to you to make informed compensation decisions.
6. On the Worksheet section toolbar, click Team, All Workers.
   Within the worksheet, you can filter who you want to see. Using the team filter, you can select just your direct reports, a specific manager, or look at all workers.
7. In the Joseph, Brian row, hover over the **Alert** icon. Alerts are useful when allocating compensation. For example, they can call attention when you enter a value that exceeds the allowed amount, when there is a salary issue, or when a worker terminates.

**Awarding a Bonus**
Award a bonus, submit your worksheet for approval, and send feedback.

1. In the Gilbert, Simon row, in the **Bonus Amount** field, enter 1000.
Entering information on the worksheet is easy. In this plan, columns you can enter information into are shaded so you can identify them quickly. Notice as you entered an amount, the bonus percentage automatically calculates.

2. Scroll to the right.
You can also enter notes or attachments to help justify your entries to your approving manager.

3. Click **Save and Close**.
When you’re finished with your allocations, you can save the worksheet and return to it later, or submit it for approval.

4. Click **Submit for Approval** to open the submit dialog box.
If you submit it, you will not be able to make further updates to the worksheet and your manager is notified that your allocations are ready for review.

5. Click **Submit** to open the Confirmation dialog box.

6. Click **Send Feedback**.
Once you submit your worksheet for approval, you can send feedback. Sending feedback is a great way to inform Compensation Administrators what did and did not work during the compensation cycle. After you fill out the survey, you only need to submit and you have completed your allocations for this cycle.

Note the type of compensation information that appears varies depending on how your company configures compensation.

**Compensation Worksheet Statuses for Managers**
As a manager progresses through a workforce compensation cycle, the manager’s worksheet status changes. The following table shows the manager’s worksheet status and the progress in the workforce compensation cycle.

<table>
<thead>
<tr>
<th>Status</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Available</td>
<td>The manager received a budget.</td>
</tr>
<tr>
<td>Not Started</td>
<td>Manager hasn’t saved any changes to his or her worksheet.</td>
</tr>
<tr>
<td>Work in Progress</td>
<td>Manager saved some changes to his or her worksheet.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Manager submitted his or her worksheet for approval.</td>
</tr>
<tr>
<td>In Approvals</td>
<td>First-level manager approved the manager’s worksheet.</td>
</tr>
<tr>
<td>Fully Approved</td>
<td>Highest-level manager or approver in the approval hierarchy approved the manager’s worksheet.</td>
</tr>
</tbody>
</table>
Create Worksheet Filters

Video

Watch: This tutorial shows you how to create advanced worksheet filters in the workforce compensation worksheet. The content of this video is also covered in text topics.

Topic

Worksheet managers can create advanced worksheet filters to manage their workers in compensation plans. Creating worksheet filters can help you identify workers who meet certain criteria so that you can allocate compensation more easily. Use the following steps to create filters:

1. Click My Team.
2. Click Workforce Compensation.
3. Click the 1 of 13 link.
   You create a filter for the Simple Merit and Bonus 2018 plan.
4. Click the Simple Merit and Bonus 2018 link.
5. Click the Reward icon.
6. Click the Filter icon.
   You can see two filters - Country and Job. You can also see an Edit Advanced Filters icon which allows you to create additional filters. Your administrator determines the filters you can see and whether you’re allowed to create additional filters during setup. If you don’t see these filters, you must contact your administrator to have them enabled.
7. Click the Personalize Layout icon.
8. In the Table Filters section, select Open to have the filters appear automatically.
9. Click Save and Close.
10. Click Edit Advanced Filters icon.
    If the existing filters aren’t what you need, you can use the Advanced Filter option to create your own filters using the columns available in the worksheet.
11. Click the Add Row icon.
    You create a filter to show the workers whose bonus amounts are below the target amount.
12. In the Name field, enter the name of the filter as Bonus less than target.
13. Click the Edit icon.
14. Click Build Condition.
15. From the Column list, select Bonus Amount.
16. In the **Operation** list, select **Is less than**.
17. Click the **Switch to Column** button to compare the value in one worksheet column against the value from another worksheet column.
18. In the **Column** list, select **Bonus Target Amount**.
   If you want to narrow your results even further, click **Next** and add more conditions to this filter.
19. Click **Done**.
   After you create a filter, you can edit it, add additional conditions, or delete any of the existing conditions.
20. Click **Validate** to verify if the expression is valid.
   If there are no errors with the expression, the filter is ready for use.
21. Click **OK**.
22. Click **Apply**.
23. Click **Save and Close**.
24. From the **Advanced Filters** list, select **Bonus less than target**.
25. Click the **Go** icon to apply the filter.

You can see there are no workers whose proposed bonus is less than their target amount.

### Create Advanced Filters for Your Worksheets

This example demonstrates how to create conditions to filter your worksheet. You want to create a filter to see workers who satisfy the following criteria:

- Performance rating is outstanding
- Compa-ratio less than 80

### Task Summary

To create the condition to filter your worksheet, complete the following tasks:

1. Create a condition.
2. Apply it to filter workers on the worksheet.

Use the default values except where otherwise indicated.

### Prerequisites

Your administrator must have:

1. Enabled and configured Compensation Performance Ratings using the Configure Performance Ratings task.
2. Enabled Advanced Filters using the Configure Filters task.
3. Enabled the following columns, if not already enabled, using the Configure Worksheet Display task:
   - Salary Range Compa Ratio - Current
   - Compensation Performance Rating - Current
Creating a Filter

1. In the Workforce Compensation work area, select the plan.
2. On the worksheet task bar, click the Edit Advanced Filters button.

   You might have the option to use View More Filters to access the Edit Advanced Filters page.
3. Click the Add Row button.
4. In the Name field, enter a unique filter name.
5. In the new row, click the Edit button.
6. Click Build Condition.
7. Complete the fields as shown in this table. Click Next after each selection, as required.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Compensation Performance Rating - Current</td>
</tr>
<tr>
<td>Operation</td>
<td>Equals</td>
</tr>
<tr>
<td>Value</td>
<td>Outstanding</td>
</tr>
<tr>
<td>Operation</td>
<td>And</td>
</tr>
<tr>
<td>Column</td>
<td>Salary Range Compa-Ratio - Current</td>
</tr>
<tr>
<td>Operation</td>
<td>Is less than</td>
</tr>
<tr>
<td>Fixed Number</td>
<td>80</td>
</tr>
</tbody>
</table>

8. Click Done to finish the condition.
9. Click Apply to return to the Edit Advanced Filters page.
10. Click Save and Close to return to the worksheet.

Applying the Filter to a Worksheet

1. On the worksheet filters bar, select the filter that you created in the Advanced field.
2. Click the Go button.
3. View your filtered worksheet.
Reassign or Delegate Workers During a Compensation Cycle

During a workforce compensation cycle, you might want a manager other than a worker’s primary worksheet manager to give suggestions or allocate compensation. There are two ways for other managers to give suggestions or allocate compensation for one or more workers:

- Reassignment
- Delegation

Both reassignment and delegation are for the plan cycle only. They don’t affect the primary worksheet manager relationships configured for the plan.

Reassignment

Reassignment moves a worker to another manager’s worksheet so the other manager can allocate compensation. When you reassign a worker to another manager:

- The worker disappears from the primary worksheet manager’s worksheet.
- The other manager makes the allocations and submits the worksheet.

For example, Joe recently joined Meg’s group. He worked for Maria for most of the year covered by the compensation cycle. Meg reassigns Joe to Maria, who then evaluates his performance and allocates compensation.

Delegation

Delegation grants another manager temporary access to a worker who does not report to the other manager or fall within the other manager’s reporting hierarchy. A primary worksheet manager can also use delegation to create a separate worksheet to manage a distinct set of his own workers. When you delegate a worker to another manager:

- The worker remains on the primary worksheet manager’s worksheet.
- The other manager does not have access to:
  - Approvals and communication tasks
  - Download to spreadsheet
  - Worker reassignments and eligibility changes
  - Budgeting, modeling, reporting

- The other manager can suggest but can’t submit allocations.
- The primary worksheet manager:
  - Sees the suggested allocations
  - Makes the final allocations
  - Submits the worksheet
For example:

- Serena works for Roger, but at a different location. Andy is the manager for the remote office and manages Serena’s day-to-day activities. Roger delegates Serena to Andy so he can comment on her performance and suggest a bonus amount. Roger sees the suggested amount and makes the final allocation.
- Robert wants to isolate a unique group of his workers. He selects the workers and delegates them to himself.

Manage Budget Sheets and Worksheets in the Integrated Workbook

You can change workforce budget and compensation amounts using the integrated Microsoft Excel workbook. Download the current budget sheet and worksheet data, make your changes, and upload them to the application database.

Download the Workbooks

In the Workforce Compensation work area, on either the budget sheet or worksheet, click **Prepare in Workbook** to create the workbook. The export builds the workbook for your entire organization, not just the workers in the worksheet or the budget sheet. The workbook format and content is independent of anything you did to personalize the budget sheet or worksheet.

For example, the workbook doesn’t apply the filters you set. It also doesn’t freeze, hide or show, reorder or change the size, or sort columns and data to match the budget sheet or worksheet.

Edit Budget or Workbook Data

After the download completes, you can change data in cells with a white background. The workbook adds a symbol in the **Changed** cell to mark the rows where you changed or entered data in one of the white cells. You can only enter values in amount columns. You can’t enter or change a value in a percentage column. When you upload your changes, the application recalculates the percentage of eligible salary column using the compensation amount you entered in the workbook.

The workbook doesn’t change results of dynamic calculations and fast formulas when you change values that they use. The application recalculates the results after you upload your changes and refresh the page. The recalculation happens only if you have configured the calculations and formulas to recalculate when data changes on the worksheet.

Upload Budget or Worksheet Changes

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

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

Validate Changes

To see the updated data, leave the budget sheet or worksheet and then return. Or if your session expired, sign back in.
Resolve Errors

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

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

To view and resolve an error:

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

Related Topics

- What’s the difference between Export to Excel and desktop integration for Excel
- Set Up Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Troubleshoot Desktop Integration for Excel

Ways to Automatically Rank Workers

If you’re ranking more than just your direct reports, you can automatically rank workers from highest rank to lowest **rank** using one of three methods:

- Rank workers based on their **ranking score**
- Rank workers based on their **ranking percentile**
- Copy direct managers’ rankings

Regardless of the method you select to automatically rank workers, multiple workers could have the same rank in the results. You select whether to either:

- Retain the ties
- Arbitrarily resolve ties

How you handle ties can change the ranking results for any of the three automatic ranking methods.

Rank Workers Based on Their Ranking Score

The ranking score considers the rankings of all managers who ranked the worker and who are in the viewing manager’s organization. A worker’s ranking score:

- Varies according to the manager viewing the score.
- Considers each manager’s position in the hierarchy.

  The rankings of higher level managers have more weight because the ranking compares the worker against a larger population of workers.
The following table compares the different ranking results for the same scores when you retain the ties or arbitrarily resolve the ties.

<table>
<thead>
<tr>
<th>Worker</th>
<th>Score</th>
<th>Retain Ties</th>
<th>Arbitrarily Resolve Ties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maria</td>
<td>100</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Rahul</td>
<td>92</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Maya</td>
<td>92</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Janice</td>
<td>92</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Carlos</td>
<td>32</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Michael</td>
<td>32</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Yan</td>
<td>18</td>
<td>4</td>
<td>7</td>
</tr>
</tbody>
</table>

**Rank Workers Based on Their Ranking Percentile**

The ranking percentile considers the ranking given by a worker’s direct manager when ranking at least ten workers. It places workers in order from highest to lowest within a range of 0 to 100.

Calculation: 100 - (rank / population * 100) = percentile. The population is the total number of workers ranked by the direct manager. For example, if the direct manager ranks a worker five out of the 27 workers she ranked, the percentile is 82.

Calculation: 100 - (5 / 27 * 100) = 82%.

The following table compares workers based on their ranking percentile.

<table>
<thead>
<tr>
<th>Worker</th>
<th>Percentile</th>
<th>Retain Ties</th>
<th>Arbitrarily Resolve Ties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maria</td>
<td>95</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Rahul</td>
<td>92</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Maya</td>
<td>82</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Janice</td>
<td>82</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Carlos</td>
<td>64</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Michael</td>
<td>50</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Yan</td>
<td>47</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>
Copy Direct Managers' Rankings

The ranking score uses rankings given by each worker’s primary worksheet manager exactly as given.

- Multiple workers can have the same ranking.
- Ranking values need not be consecutive.
- Managers can select to give the same ranking to multiple workers or can select to leave gaps in the ranking.

The following table compares the different tie handling results for a manager viewing the rankings that managers in his organization gave to their direct reports.

<table>
<thead>
<tr>
<th>Direct Manager</th>
<th>Worker</th>
<th>Direct Manager's Ranking</th>
<th>Copy Direct Manager's Ranking</th>
<th>Retain Ties</th>
<th>Arbitrarily Resolve Ties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lakshmi</td>
<td>Maria</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Lakshmi</td>
<td>Rahul</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Lakshmi</td>
<td>Maya</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Lakshmi</td>
<td>Janice</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Barry</td>
<td>Carlos</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Barry</td>
<td>Michael</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Barry</td>
<td>Yan</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Barry</td>
<td>Prasad</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>7</td>
</tr>
</tbody>
</table>

Related Topics

- How the Ranking Score is Calculated

Promote Workers During Workforce Compensation Cycle

Video

Watch: This tutorial shows you how to promote workers during a workforce compensation cycle. The content of this video is also covered in text topics.
**Topic**

Tasks for promoting a worker during a workforce compensation cycle include:

- Verify the worker’s eligibility for promotion
- View the worker’s performance in relation to the rest of the team
- Submit the promotion for approval

**Verifying the Worker’s Eligibility for Promotion**

View the job history of the worker you plan to promote. In this case, you’re signed in as Susan, a director, who needs to complete the allocations for this year’s compensation cycle.

1. In the My Team work area, click **Team Compensation**.
2. In the Related Links side panel tab, click **Manage Workforce Compensation**.
3. Click the **1 of 13** link to open the Primary Managed Plans dialog box.
4. Click **Simple Merit and Bonus 2018** to view the details of the plan.
5. Click the **Promote** icon.

   During the compensation cycle, you can promote or change their Grade, Job, or Position.

6. In the **Carnes, Linda** row, click the **Job History** icon.

   Verify that the worker meets the company guidelines to be eligible for the promotion. In this case, the job history indicates that Linda Carnes meets the company guideline that a worker must be a Human Resources Specialist for at least three years to be promoted to a Human Resources Business Partner.

7. Click **Done**.
8. From the **Proposed Job** list, select **Human Resources Business Partner**.
9. From the **Proposed Grade** list, search for and select **Prof06**.
10. Click the **Note** icon.
11. On the **Notes** toolbar, click the **Create** icon.
12. In the Notes field, enter a justification for why you’re promoting the worker. In this case, enter **Linda has been training for 2 years for this position and has repeatedly exceeded expectations each year**.
13. Click **OK**.

   You can optionally add attachments such as the worker’s last performance review or the certifications that the worker has earned.

14. Click **Done**.

**Viewing the Worker’s Performance in Relation to the Rest of the Team**

As you go through your promotions, you can use the analytics in the summary to see how these promotions look across your team before you submit them for approval.

On the By Team tab you can see how many and what percentage of workers in your team are being promoted. In this case, 1 of 5 workers in the team, or 20% of the team, is being promoted.

The following steps show how you can view the promotion in relation to the rest of the team:

1. Click **By Current Job** to see what jobs you’re promoting workers from.
2. Click **By Performance Management Rating**. In this case, you can see that you’re promoting workers with the rating of **Exceeds Expectations**.
3. Click **Organization Averages** to see how the promotion affects the whole organization. You can view all the promotions submitted to your manager. In this case, you can see that only you have submitted a promotion among your manager’s reports.

4. After you have verified all the information, click **Save and Close**.

5. Click **Submit for Approval**.

   By clicking **Submit**, you send your full worksheet for manager approval and not just the promotion. Your manager’s approval will apply also to your subordinates’ worksheets, preventing any further changes. Ensure that you complete your bonus allocations and all the managers who report to you have saved their changes before you submit.

6. Click **Cancel**.

   In this case, you have saved Linda’s promotion for the time being.

### Approve and Submit Compensation Worksheets

#### Video

**Watch:** This tutorial shows you how to review your team’s allocations, approve lower-level managers’ worksheets, and submit your workforce compensation worksheet for approval. The content of this video is also covered in text topics.

#### Topic

Tasks for approving and submitting work in compensation plans include:

- View your approvals
- View the compensation overview
- View the allocation statistics
- Check for alerts or warnings
- Approve and submit the worksheets

In this case, you’re signed in as Henry Jones, a manager.

1. In the My Team work area, click **Workforce Compensation**.
2. Click the **1 of 14** link to open the Primary Managed Plans dialog box.
3. Click **Corporate Bonus Plan 2018** to view the details of the plan.

#### Viewing Your Approvals

1. Select **Approvals**.

   You must take action on a pending worksheet before you can submit your entire worksheet for approval. The approvals tab displays the details of all the managers who report to you. Expand the view to see lower-level managers for each of your direct reporting managers. You can approve a manager’s worksheets and see where the worksheets are in the approval process. You can also look at the status of your entire organization.

2. In the **Jones, Henry** row, click the **Manager’s Team Status** icon.
3. Click the **Detailed Status Report** to see the approval status of your entire team. The **Details** tab gives you the details of the approval status of your entire team.
4. Click **Done**.
   The **Action Required** column shows you who among your managers still needs to take action on the worksheet. In this case, you can see that one of your managers needs to take action on the worksheet.

5. In the **Swift, Linda** row, click the **Access Level** list and show options.
   You can change the worksheet access for lower-level managers. In this case, Linda Swift is a new manager. At the beginning of the compensation cycle, you changed her access to **No updates allowed** and allocated compensation to her team on her behalf since she wasn’t present during the performance time frame.
   In this case, you want Linda to be able to see the compensation you allocated to her team. Therefore, you set her worksheet access to **No Updates Allowed**. If you don’t want a lower-level manager to see the allocations you have made, set the access for that manager to **No Access**.

6. In the **Swift, Linda** row, click to close the **Access Level** list.
   You can request information from managers at any time, even after they have submitted their worksheets for approval. You can also return their submitted worksheets if they need to make changes.
   In order to take any of these actions, you must click to highlight the person that you want to take action on.

### Viewing the Compensation Overview

Use the **Compensation Overview** tab to understand how the allocations look for your entire organization before submitting your own worksheet for approval.

1. Select **Compensation Overview**
   The **Compensation Overview** highlights the number of eligible workers in each of your manager’s teams that were allocated a bonus. See how the total bonuses allocated compares to the budget given to each manager. You can also see how total amounts allocated compare to total budgets, if you use budgets.

2. In the **Component** list, select either **Salary** or **Bonus** to view the figures for each independently. In this case, the plan is only for bonuses.

### Viewing the Allocation Statistics

Use the **Allocations Statistics** analytics to see how the average and highest bonus allocations compare across your lower managers' teams. Select **Allocation Statistics** to see the allocation details.

### Checking for Alerts or Warnings

Check **Alerts** to view outstanding issues that need to be resolved before you submit your worksheet for approval.

1. Select **Alerts**.
2. In the **Jones, Henry** row, click **2** in the **Alert** column.
3. Click the **Question Mark** icon.
   In this case, you can see that the alert is informational and doesn’t require any action.

4. Click **Done**.

### Approving and Submitting the Worksheets

After you have reviewed the worksheets of your lower managers, you can approve them.

1. Select **Approvals**
2. From the **Approve** list, select **All Managers**.
3. Click **Yes**.
4. Click **OK**.
5. Click **Save and Close**.

   After you have approved the worksheets for all you lower managers, you can submit your own worksheet for approval.

6. Click **Submit for Approval**.
7. Click **Submit**.

---

### Manage Multiple Worksheets for Different Hierarchies

**Watch video**

Use the Workforce Compensation page to manage secondary compensation plans and other plans that are available to you.

#### View Secondary Managed Plans

1. On the **Home** page, click **My Team, Workforce Compensation** to open the landing page.
2. Click the **3 of 11** link to open the plans dialog box.
3. In the **Secondary Managed Plans** section, click **Global Compensation Plan 2019**.
4. Click **Allocate Merit**.

   You can review the compensation details of the workers who reported to you during a project.

5. In the **Salary Amount** field, enter the appropriate value.
6. Click **Save and Close**.

#### View Other Plans for Review

1. Click the **10 of 11** link to open the plans dialog box.
2. In the **Other Plans for Review** section, click **Global Compensation Plan 2019**.
3. Click **Allocate Merit**.

   You can review the compensation of workers who used to report to you, but now have transferred to other teams.

4. Click **Save and Close**.

#### Submit Worksheet for Approval

1. Click the **11 of 11** link.
2. In the **Primary Managed Plan 2019** section, click **Global Compensation Plan 2019**.
3. Click **Submit for Approval**.
4. Click **Submit**.
5. Click **OK**.

---

### FAQs
Can I switch to any other manager?

You can switch to any user who is in your security profile. For line managers, this is commonly lower-level managers in your hierarchy.

How can I reassign workers to another manager's worksheet?

Follow these steps:

1. Use the Assign Workers to Another Manager option on the Actions menu or the right-click menu to transfer one or more workers for this cycle only.
2. Select the manager to whom you want to reassign the workers.
3. Specify how to reassign subordinates if the workers are managers.

For example, you reassign a worker to his previous manager's worksheet because the worker reported to that manager during the evaluation period.

What happens if I filter my worksheet by two or more teams?

The summary table information dynamically changes to show the values for the teams you select. When you further filter the worksheet, such as by job, the summary information changes to reflect the filtered data. It continues to display the budget information associated with the managers that you selected in the team filter. The budget information changes when you use worker-level budgeting but not manager-level budgeting. The other data, such as eligible salary and total allocations, change with the filters.

What happens if I switch the display currency?

Switching the display currency on the page has no effect on the processing. The application processes the salary adjustments and lump sum awards in the worker's local currency.

What's the difference between primary managed plans, secondary managed plans, and other plans for review?

Primary managed plans are plans for which you are responsible for managing and allocating compensation to your team. You submit primary managed plans for approval.

Secondary managed plans and other plans for review are plans for which you are not the primary worksheet manager but have at least one worker delegated to you. You can suggest and save allocations for the worker if you are given the ability to update the worksheet. You don’t submit allocations for approval for workers delegated to you. If you don’t have a secondary managed plan or other plan to review, those regions don’t appear in the available plans window.
Why do I have other plans to review?
Another manager has given you temporary access to one or more workers so you can suggest allocations. You can review the other plans in the workforce compensation work area.

What happens if I delegate a worker to another manager?
The other reviewer sees a plan that includes the delegated worker in the Other Plans for Review section of the available plans window. The other reviewer views the worksheet data and suggests allocations. The worker remains on your worksheet. You can accept or override the suggested allocations. When you submit your worksheet, you submit the allocation for the delegated worker.

Can I perform actions for the workers in my other plans to review?
Yes. You can suggest compensation amounts and save your suggested allocations. You can view other data available in the worksheet. The primary worksheet manager of the delegated worker sees the suggested allocations on his own worksheet.

What happens if I approve my lower manager’s worksheet?
The lower manager’s access level changes to Approved and the worksheet goes to the next level for approval. Lower managers can no longer make updates to their worksheets.
10 Administer Workforce Compensation

Overview of Administer Workforce Compensation

Maintain the definitions of compensation plans and global models, maintain and update worker and plan information, run processes, and review administration reports.

Compensation administrators can:

- Update plan data.
- Maintain currency rates and access to plans from the watchlist.
- Run processes to:
  - Start a compensation cycle
  - Transfer data to the HR system
  - Back out, purge, and refresh compensation data

Compensation managers can:

- Create and manage models for use by line managers or by administrators to distribute compensation directly to workers.
- Manage worker data by changing assignment data effective for the current plan cycle only.
- Override line manager allocations, job changes, and performance ratings.
- Analyze plan results.

To administer workforce compensation, select Compensation on the home page.

Related Topics

- Enter Daily Rates Using the Daily Rates Spreadsheet
- Update Currency Rates

Options to Configure Approvals in Compensation

The hierarchy type defined for the plan determines the approvals hierarchy. You can create an alternate approval hierarchy for a manager that overrides the plan hierarchy.

You can also specify:

- Approvals in a different sequence
- Approvals by different people
- When managers can submit their worksheets for approval
- When they can approve their lower managers' worksheets
Decisions to make when configuring approvals are:

- Approval mode
- Submit mode
- Alternate approver hierarchy

### Approval Mode

Approval mode identifies when managers can approve their lower managers’ worksheets. The following table shows the approval mode and timing.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve anytime</td>
<td>Managers can approve their lower managers’ worksheets at any time during the period the worksheet is available to them.</td>
</tr>
<tr>
<td>Manager must first submit</td>
<td>Lower level managers must submit their worksheets upward for approval before a higher level manager can approve them.</td>
</tr>
<tr>
<td></td>
<td>Ensures that higher managers don’t approve worksheets before lower managers have had time to complete them.</td>
</tr>
<tr>
<td>Disable approvals</td>
<td>Approvals are not required. Approve and Return for Correction actions are not available.</td>
</tr>
</tbody>
</table>

### Submit Mode

Submit mode identifies when managers can submit their worksheets. The following table shows the submit mode and timing.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit anytime</td>
<td>Managers can submit their worksheets at any time during the period the worksheet is available to them.</td>
</tr>
<tr>
<td>All managers must be approved</td>
<td>Lower level managers must have their worksheets approved before a higher level manager can submit his own worksheet for approval.</td>
</tr>
<tr>
<td></td>
<td>Ensures that higher managers review and approve allocations of lower managers before submitting allocations for their entire organization for approval.</td>
</tr>
<tr>
<td>Disable submit</td>
<td>Managers can only save their worksheets. The Submit action is not available.</td>
</tr>
</tbody>
</table>

### Alternate Approver Hierarchy

By defining alternate approvers, you replace the standard approval hierarchy for a manager with a new set or sequence of approvers. Features of an alternate approver hierarchy are:

- The alternate approver doesn’t have to be a part of the regular plan hierarchy.
- You can create a brand new approval hierarchy for any manager. Do this by identifying the specific individuals and using the approval sequence to determine the order in which approvals occur.
• The highest sequence is the final approver.

You commonly use alternate hierarchies when approval control transitions from managers to the HR department.

Enter Currency Conversion Rates

Enter currency conversion rates manually on the Manage Active Plans page, Currency Conversion Rates tab in the Compensation work area if you don’t populate the rates through the Manage Daily Rates task. The Transfer Data to HR process posts award amounts in each worker’s local currency. Converted rates are for display only in the worksheet. The application doesn’t use the rates in any further calculations. You can refresh conversion rates on the Manage Daily Rates page. Click Refresh and then Refresh Summary Totals.

Entering the Rate

To enter a new currency conversion rate that converts the corporate currency into a new currency:

1. Add a new row.
2. Search for and select the currency code, such as CAD.
3. Enter the conversion rate.
   
   For example, enter 1.00695 where 1 USD equals 1.00695 CAD.
4. Save the rate.

Repeat these steps to add additional currencies. If you manually override rates after starting a compensation cycle or publishing budgets, run the refresh data process immediately to refresh summary data to use the current rates. Run the processes from the Run Batch Process page.

Examples of Managing Workers After the Compensation Cycle Starts

You can reprocess an individual who was previously found eligible or ineligible and reevaluate eligibility for a plan. You can add to a plan a worker who was not originally found eligible. The following scenarios illustrate when you might want to reprocess or add a worker to a plan after the compensation cycle starts.

Worker Transfers Into an Organization

Maria transfers into your organization after the compensation cycle starts and might be eligible to receive compensation. The process evaluates her eligibility for the plan and cycle based on the plan and cycle you select. If the process finds Maria eligible for the compensation plan, it adds her to the appropriate manager’s worksheet.
Worker's Data is Corrected in HR

Michael was ineligible for a compensation plan because of incorrect data in his employment record. HR corrects the data after the compensation cycle starts. When you reprocess Michael, the process reevaluates his eligibility based on the corrected data. If it finds Michael eligible, it adds him to the appropriate manager’s worksheet.

Worker Leaves an Organization

Janice is eligible for compensation when a cycle starts. A week later, she leaves your organization and is no longer eligible for a compensation award. When you reprocess Janice, the process reevaluates her eligibility, finds her ineligible, and removes Janice from her manager’s worksheet.

Contingent Worker Becomes a Regular Worker

Ravi, a contingent worker, is not eligible to receive compensation when a cycle starts, but manages workers who are eligible. At this time his processing status is Limited, which allows him only to allocate compensation and approve lower managers’ worksheets. A few weeks later, Ravi becomes a regular worker and is now eligible to receive compensation. When you reprocess Ravi, the process reevaluates his eligibility and finds him eligible. Ravi’s eligibility status changes to Eligible and the process adds him to the appropriate manager’s worksheet.

FAQs

What's the difference between primary worksheet managers, secondary managers, and other reviewers?

Primary worksheet managers are the worksheet owners responsible for the final compensation allocated to eligible workers, commonly the supervisors of the workers who appear on the worksheets. Each manager in the primary hierarchy receives a worksheet to allocate compensation to his directs and indirect reports. Primary managers manage budgets and submit their worksheets for approval up the approval hierarchy.

Secondary worksheet managers can view compensation information for workers available to them, including workers at lower levels in the hierarchy. Secondary worksheet managers are not necessarily the workers’ primary worksheet managers but can be. Depending on how the plan is configured, the secondary managers can update and propose compensation and save their worksheet. Or they can only view allocations proposed by the primary worksheet manager. They don’t submit worksheets for approval. Primary worksheet managers consider secondary managers’ proposed allocations and may include them when they submit their worksheets.

Other reviewers are people who are delegated one or more workers by primary worksheet managers. Other reviewers have access similar to secondary managers, but the review hierarchy is only one level.
Why would I add another reviewer to this worker?

The primary worksheet manager may not be familiar with the worker’s performance because the worker receives daily direction from another person or works in a different location than the primary worksheet manager.

What's a Limited to Normal processing method?

This method gives full participation in a workforce compensation plan to a person who has limited participation. When a person isn’t eligible for a plan but has at least one subordinate worker who is eligible, the person’s eligibility is Limited. The person can manage budgets and allocate compensation but can’t receive compensation within the plan.

If the person becomes eligible for the plan after a cycle starts, you can add the person using the Limited to Normal processing method. The process adds the person to a manager’s worksheet and makes the person eligible to receive compensation.

You can use the Administer Workers task to update an individual worker. Or use the Reevaluate Limited Eligibility option on the Refresh Data process to update several workers.

What's the difference between real-time statements and stored statements?

Managers generate real-time statements while in the communications task in a compensation plan. Administrators can generate them in the adminster workers task.

Administrators generate stored statements when they run the Process Workforce Compensation Change Statements process. People can then use these statements if they have the required access. Administrators can select the access visibility option to grant access.
11 Run Batch Processes

Refresh Data Process Options

The Refresh Data process synchronizes workforce compensation data with HR data, updates the plan design, updates the currency conversion rates, and recalculates the summary data. Decisions you make when you run the refresh data process involve the:

- Refresh date
- Refresh options

Refresh Date

The refresh date determines the date used to refresh the data for the selected refresh options. Run the process as often as needed depending on your business requirements. Refresh frequency examples:

- Refresh nightly to ensure that line managers see the most current data including terminated workers, transfers, and other employment changes.
- Refresh only after you make a change to the plan configuration.

The following table shows the refresh date options and the corresponding date used to refresh the data:

<table>
<thead>
<tr>
<th>Refresh Date</th>
<th>Date Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Process Run Date</td>
<td>Date the process runs for all processing, including eligibility.</td>
</tr>
<tr>
<td>Plan Cycle Dates</td>
<td>Following two dates configured on the Plan Cycle dialog box:</td>
</tr>
<tr>
<td></td>
<td>• Eligibility Determination Date for eligibility processing</td>
</tr>
<tr>
<td></td>
<td>• HR Data Extraction Date for all other processing</td>
</tr>
<tr>
<td>Specific Date</td>
<td>Date you enter for all processing, including eligibility.</td>
</tr>
</tbody>
</table>

Predefined alerts use the most appropriate date for the type of alert and are exempt from the Refresh Data processing. In addition, new salary ranges, new compa-ratio, and other metrics associated with a promotion to a new grade use the Promotion Effective Date.

Refresh Options

You can select one or more refresh options to process. Manual primary worksheet manager and worker eligibility changes revert to their original values unless you identify the changes you don’t want overridden on the Administer Workers pages.

The following table shows the refresh options and what is processed:
### Oracle Human Capital Management Cloud

#### Using Workforce Compensation

**Chapter 11**

**Run Batch Processes**

<table>
<thead>
<tr>
<th>Refresh Option</th>
<th>Processing Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full Refresh</strong></td>
<td>Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• All HR data</td>
</tr>
<tr>
<td></td>
<td>• Base and eligible salary</td>
</tr>
<tr>
<td></td>
<td>• Primary, secondary, and other reviewer hierarchies</td>
</tr>
<tr>
<td></td>
<td>• Column defaults</td>
</tr>
<tr>
<td></td>
<td>• Due dates</td>
</tr>
<tr>
<td></td>
<td>• Dynamic columns and alerts, included predefined alerts</td>
</tr>
<tr>
<td></td>
<td>• Summary totals</td>
</tr>
<tr>
<td></td>
<td>Reevaluates eligibility</td>
</tr>
<tr>
<td><strong>Refresh HR Data</strong></td>
<td>Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• All person and HR-related data, except the primary worksheet manager</td>
</tr>
<tr>
<td></td>
<td>• Dynamic columns that include the Refresh Data triggering event</td>
</tr>
<tr>
<td></td>
<td>• Worksheet summary region totals</td>
</tr>
<tr>
<td><strong>Refresh Base and Eligible Salary</strong></td>
<td>Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• Base salary, salary basis, and salary range columns, and anything stored related to these fields, such as base salary frequency, adjusted salary, FTE salary, compa-ratio, and more</td>
</tr>
<tr>
<td></td>
<td>• Local currency, if input currency was used</td>
</tr>
<tr>
<td></td>
<td>• Default values for eligible salary</td>
</tr>
<tr>
<td></td>
<td>• Dynamic columns that include the Refresh Data triggering event</td>
</tr>
<tr>
<td></td>
<td>• Worksheet summary region totals</td>
</tr>
<tr>
<td><strong>Refresh Primary Manager Hierarchy</strong></td>
<td>Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• Primary worksheet manager and rebuilds the hierarchy</td>
</tr>
<tr>
<td></td>
<td>• Worksheet summary section totals</td>
</tr>
<tr>
<td><strong>Refresh Secondary Manager Hierarchy</strong></td>
<td>Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• Secondary manager and rebuilds the hierarchy</td>
</tr>
<tr>
<td></td>
<td>• Worksheet summary section totals</td>
</tr>
<tr>
<td><strong>Refresh Other Reviewer Hierarchy</strong></td>
<td>Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• Manager listed as other reviewer, unless a primary manager selects the reviewer manually on the worksheet</td>
</tr>
<tr>
<td></td>
<td>• Worksheet summary section totals</td>
</tr>
<tr>
<td><strong>Reevaluate Eligibility</strong></td>
<td>Reprocesses a worker’s eligibility at the plan and the component levels. This might establish new eligibility if you track ineligible workers. If you don’t track ineligible workers, you use the Start Workforce Compensation process to add workers into a started plan. Refreshes the following:</td>
</tr>
<tr>
<td></td>
<td>• Dynamic columns that include the Refresh Data triggering event</td>
</tr>
<tr>
<td></td>
<td>• Worksheet summary section totals</td>
</tr>
<tr>
<td><strong>Reevaluate Limited Eligibility</strong></td>
<td>Refreshes the managers that have a status of Limited.</td>
</tr>
</tbody>
</table>
### Refresh Option | Processing Description
--- | ---
**Refresh Column Defaults** | Refreshes the column defaults by running the following refresh options:
- Refresh HR Data
- Reevaluate Eligibility
- Refresh Manager Hierarchy
- Refresh Dynamic Columns
- Refresh Summary Totals

**Refresh Due Dates** | Refreshes due dates configured in the plan cycle, including the hierarchy due dates.

**Refresh Dynamic Columns and Alerts** | Refreshes the following:
- Dynamic columns and alerts that include the Refresh Data triggering event
- Worksheet summary section totals

**Refresh Predefined Alerts** | Refreshes the alerts that include the Refresh Data triggering event.

**Refresh Summary Totals** | Refreshes the following for the summary section data for the plan and period:
- Total count for all managers and directs
- Eligible count for all managers and directs

**Refresh Terminated Worker Data Using Process Date** | Refreshes the terminated worker’s HR data using the batch process date.

**Refresh Active Plan Data** | Refreshes the following plan definition data for the plan and period:
- Components
- Component post as salary option
- Budget pools such as status, budgeting style, submit mode, and approval mode

**Refresh Currency Conversion Rates** | Refreshes the exchange rate data as of the refresh date for the plan and period.

**Lock Worksheet While the Process Runs** | Prevents managers from updating their worksheets while you run the process.

For the Refresh Column Defaults option the process does not override existing column values that are not from HR and don’t have a column default or dynamic calculation defined. The process does include recalculating an eligible salary that is derived using a formula or determined using a dynamic calculation.

**Related Topics**
- How You Configure the Promotion Effective Date in Workforce Compensation
- Options to Track and Display Ineligible Workers
Transfer Data to HR Process Options

The **Transfer Data to HR** process synchronizes workforce compensation data with HR data. Base pay adjustments are posted to salary records, job, and grade. Position changes are posted to HR, and element entries, to payroll. You can process all the transactions at once, or you can break up the transactions through a series of steps.

The following table shows the process steps and describes the options:

<table>
<thead>
<tr>
<th>Number</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1      | Plan Details       | Select the plan fundamentals:  
  - Plan  
  - Cycle  
  - Action  
  - Action Reason |
| 2      | Element Details    | Post elements to element entries. You can select all the elements the plan uses that are not salary.  
You want to transfer all elements at the same time. You can't reprocess workers who are already processed in this step. |
| 3      | Salary Details     | Post salary allocations as components or single entries. You can post salary separately from the other transfer items.  
You want to transfer all worker salary updates at the same time. |
| 4      | Stock Option Details | Record stock granted from the plan to the stock history. Stock history is visible from a worker’s compensation history. You can display stock history in total compensation statements. You can post stock separately from the other transfer items.  
You want to transfer all stock updates at the same time. |
| 5      | Promotion Details  | Post changes to job, position, or grade to HR. You can post promotions separately from the other transfer items.  
If you want to mark a worker’s salary update as a promotion, the best practice is to process promotions in a separate batch and include salary updates and any bonuses in that process. |
| 6      | Other Details      | Define other details, as required. Select a specific manager hierarchy to process |
Number | Step | Description
--- | --- | ---
7 | Submit Process | Submit your process.

### Formula Type for Compensation Person Selection

The Compensation Person Selection formula determines the person selected for an associated workforce compensation plan. You select the formula when you run the Start Workforce Compensation Cycle process.

### Contexts

The following contexts are available to formulas of this type:

- DATE_EARNED
- EFFECTIVE_DATE
- END_DATE
- START_DATE
- HR_ASSIGNMENT_ID
- HR_TERM_ID
- JOB_ID
- LEGISLATIVE_DATA_GROUP_ID
- COMPENSATION_RECORD_TYPE
- ORGANIZATION_ID
- PAYROLL_ASSIGNMENT_ID
- PAYROLL_RELATIONSHIP_ID
- PAYROLL_TERM_ID
- PERSON_ID

### Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

### Input Variables

The following input variables are available to formulas of this type.
### Input Values

<table>
<thead>
<tr>
<th>Input Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_IV_PLAN_ID</td>
<td>Number</td>
<td>Y</td>
<td>Plan ID</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_ID</td>
<td>Number</td>
<td>Y</td>
<td>Period ID</td>
</tr>
<tr>
<td>CMP_IV_PLAN_START_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Start Date</td>
</tr>
<tr>
<td>CMP_IV_PLAN_END_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan End Date</td>
</tr>
<tr>
<td>CMP_IV_PLAN_ELIG_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Eligibility Date</td>
</tr>
<tr>
<td>CMP_IV_PERFORMANCE_EFF_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Performance Effective Date</td>
</tr>
<tr>
<td>CMP_IV_PROMOTION_EFF_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Promotion Effective Date</td>
</tr>
<tr>
<td>CMP_IV_XCHG_RATE_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Currency Conversion Date</td>
</tr>
<tr>
<td>CMP_IV_ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Assignment ID</td>
</tr>
<tr>
<td>CMP_IV_PERSON_ID</td>
<td>Number</td>
<td>Y</td>
<td>Worker ID</td>
</tr>
</tbody>
</table>

### Return Values

The following return variables are available to formulas of this type.

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>L_SELECTED</td>
<td>Char</td>
<td>N</td>
<td>Y or N</td>
</tr>
</tbody>
</table>

### Sample Formula

This sample formula determines if a person is selected for a workforce compensation plan based on their assignment_id.

```plaintext
/**************************************************************************/
* FORMULA NAME : Compensation Selection Formula                         *
* FORMULA TYPE : Compensation Person Selection                          *
* DESCRIPTION: Assignment_id based selection fast formula               *
**************************************************************************/

/**------------- INPUT VALUES DEFAULTS BEGIN -----------------------------*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)        
/**------------- INPUT VALUES DEFAULTS ENDS--------------------------------*/

/**------------- FORMULA SECTION BEGIN ------------------------------------*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
l_selected = 'Y'
/* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/
if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
```
l_selected = 'N'
}
else
{
  l_selected = 'Y'
}
RETURN l_selected

How You Restrict Processing of Workers During Transfer of Data

When you run the Transfer Data to HR process, you can limit processing to only those workers whose manager’s worksheet is at a specific level of the approval process. You select a **Workers Approved at Least N Managers Up** level on the Other Details process page. This option enables you to process workers whose allocation is approved at the specified level, even if worksheets at higher levels of the hierarchy are still pending approval.

Worksheet Approval Status

A primary worksheet manager submits his worksheet for approval. The manager’s worksheet has a status of "In Approvals" when both of the following occur:

- The manager one level up approves the worksheet, either by explicit approval or submitting his own worksheet for approval.
- The worksheet is pending approval by any manager higher in the approval hierarchy.

Workers whose manager’s worksheet has the status of "In Approvals" at the level you selected are not processed.
Examples

The following diagram shows a partial management hierarchy, with the worker’s worksheet manager at level 0, the director, vice president (VP), and chief executive officer (CEO) at levels 1, 2, and 3 respectively in the approval chain.

You select a **Workers Approved at Least N Managers Up** level of "1". The worksheet has to be approved by the approver only one level above the worker’s primary worksheet manager for the workers to be processed. In the diagram, the director must have approved the manager’s worksheet. The manager’s worksheet must be Approved or In Approvals for the worker to be processed.

You select a **Workers Approved at Least N Managers Up** level of "3". The worksheet must be approved by the approver three levels above the worker’s primary worksheet manager for the workers to process. In the diagram, the CEO has to approve the VP’s worksheet for the worker to be processed. The VP’s worksheet must be Approved or In Approvals for the worker to be processed.

To process the Director and VP and the workers that report directly to them, their worksheets must be fully approved since there are not three levels above them.
How You Handle Processing of Terminated Workers

Workers with a termination date between the cycle evaluation start date and HR data extraction date are included in the cycle as long as they meet all eligibility criteria. The Start Compensation Cycle process uses the worker’s termination date to extract HR data rather than the HR Data Extraction date.

When the cycle is over, the Transfer Data to HR process creates element entries and salary records to process lump sum awards and salary adjustments. The effective date of the award must be earlier than or equal to the worker’s termination date. The Transfer Data to HR process fails if a salary adjustment or lump sum effective date is later than the worker’s payroll last standard process date.

FAQs

What happens if I post single entries as components?

The Transfer Data to HR process itemizes each worker’s salary adjustment into salary components. For example, you allocate the salary adjustment for a worker as follows:

- Merit component = 5,000 USD
- Promotion component = 2,000 USD
- Adjustment component = 1,000 USD

When you post single entries as components, the Transfer Data to HR process posts an 8,000 USD base salary increase to the worker’s salary record itemized into:

- Merit = 5,000 USD
- Promotion = 2,000 USD
- Adjustment = 1,000 USD

If you don’t post single entries as components, the Transfer Data to HR process posts an 8,000 USD increase to the worker’s salary record without any record of the component division.

How can I process stock during a workforce compensation cycle?

Follow these steps when you run the Transfer Data to HR process:

1. Enter stock grants at the **Stock Grant Details** step
2. Select the worker population by defining the worker inclusion criteria at the **Other Details** step

The process posts the information to the stock history table and it’s available in compensation history. You don’t have to set up payroll elements.
Why are the worker inclusion counts shown in the Statistics dialog box not what I expected?

The statistics include workers using the manager hierarchy and worker inclusion criteria. The statistics don’t include workers using the person selection formula.

Why can’t workers see their workforce compensation statements?

If workers can’t see their statements, ensure that the following settings are correct:

- Worker statements are enabled on the Configure Global Settings page.
- The expiration date on the Process Worker Statements batch process is later than the process date.
- The Visibility field on the Process Worker Statements batch process dialog box is set to include workers.

Why can’t I see my plan in the list of values for the Start Compensation Cycle process?

Your user role does not have access to view the plan. Verify the following:

- The Configure Plan Access task for the plan doesn’t restrict access for the compensation administrator role.
- Your user has the compensation administrator role or the proper security to run the compensation batch processes.
12 Manage External Data

External Data Lookups

You can categorize data from third-party or legacy applications based on a lookup. You can edit or add new values to the External Data lookup type during initial implementation and at any later time. For example, you create a lookup code for your 401K plan data. The following external data lookups are predefined:

- Data from a legacy application
- Data from a third-party supplier

Use the Manage Lookups task in the Compensation work area to add or edit the lookup codes for the CMP_EXTERNAL_DATA_RECORD_TYPE lookup type.

Related Topics

- Overview of Lookups

Add External Compensation Data

This example demonstrates how to add a single row of external data and then use the data in workforce compensation and total compensation statements.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you want to use one of the delivered lookup codes or add a unique code?</td>
<td>Add a unique code</td>
</tr>
<tr>
<td>Do you want to import or manually add the external data?</td>
<td>Manually add</td>
</tr>
<tr>
<td>Do you want to use the data for workforce compensation or total compensation statements?</td>
<td>Both</td>
</tr>
</tbody>
</table>
| What do your external data user-defined columns represent? | Column 01 is Beginning Balance  
  Column 02 is Ending Balance |

Task Summary

To import external compensation data, complete the following tasks. Use the default values except where otherwise indicated.

1. Add a lookup code.
2. Add external data.
3. Configure the worksheet columns.
4. Configure the compensation items.

Prerequisites
1. Install the Oracle ADF Desktop Integration Add-in for Excel.
2. Configure a workforce compensation plan.
3. Create a total compensation statement.

Adding a Lookup Code
1. In the Compensation work area Tasks panel tab under Common Configuration, click Manage Lookups to open the Manage Lookups page.
2. Search for the CMP_EXTERNAL_DATA_RECORD_TYPE lookup type.
3. In the CMP_EXTERNAL_DATA_RECORD_TYPE: Lookup Codes section, click Add.
4. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lookup Code</td>
<td>FID_401K</td>
</tr>
<tr>
<td>Display Sequence</td>
<td>1</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/01</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/20</td>
</tr>
<tr>
<td>Meaning</td>
<td>Fidelity 401K</td>
</tr>
<tr>
<td>Description</td>
<td>Data from Fidelity 401K provider</td>
</tr>
</tbody>
</table>

5. Click Save.

Adding External Data
1. In the Compensation work area Tasks panel tab under Common Configuration, click Manage External Data to open the Manage External Data page.
2. In the Search Results section, click Add.
3. In the Person Name field, select the person for whom you're adding the external data.
4. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Fidelity 401K</td>
</tr>
</tbody>
</table>
Configuring the Worksheet Columns

1. In the Compensation work area Tasks panel tab under Workforce Compensation, click Manage Plans to open the Manage Workforce Compensation Plans page.
2. Click the configured workforce compensation plan to open the Define Workforce Compensation page.
3. For Configure Worksheet Display, click Go to Task to open the Configure Worksheet Display page.
4. For a compensation type tab, click Configure to open the Configure Worksheet Page Layout page.
5. Select the Detail Table tab.
7. Enable User-Defined Numeric Column 16. Because the external data in this example is numeric, you select a numeric type column.
8. In the Display Name field, enter Beginning Balance.
9. Click the Configure Column Properties button to open the Configure Column Properties page.
10. In the Default Values section, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Data Record Type</td>
<td>Fidelity 401K</td>
</tr>
<tr>
<td>External Data Column</td>
<td>Column 01</td>
</tr>
</tbody>
</table>

11. Click OK to return to the Configure Worksheet Page Layout page.
13. In the Display Name field, enter Ending Balance.
14. Click the Configure Column Properties button to open the Configure Column Properties page.
15. In the Default Values section, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Data Record Type</td>
<td>Fidelity 401K</td>
</tr>
</tbody>
</table>
Configuring the Compensation Items

Add the two compensation items. Repeat steps 2 and 3 to create the second compensation item.

1. In the Compensation work area Tasks panel tab under Total Compensation Statements, click **Manage Compensation Item** to open the Manage Compensation Items page.
2. In the Search Results section, click **Create** to open the Create Compensation Item dialog box.
3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Item One Value</th>
<th>Item Two Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item Name</strong></td>
<td>Beginning Balance</td>
<td>Ending Balance</td>
</tr>
<tr>
<td><strong>Source Type</strong></td>
<td>External Data</td>
<td>External Data</td>
</tr>
<tr>
<td><strong>Record Type</strong></td>
<td>Fidelity 401K</td>
<td>Fidelity 401K</td>
</tr>
<tr>
<td><strong>Column</strong></td>
<td>Column 01</td>
<td>Column 02</td>
</tr>
<tr>
<td><strong>Type of Compensation</strong></td>
<td>Monetary</td>
<td>Monetary</td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>US Dollar</td>
<td>US Dollar</td>
</tr>
</tbody>
</table>

4. Click **Save and Close** to return to the Manage Compensation Items page. The first time, repeat steps 2 and 3 to create the second compensation item. The second time, click **Save and Close**.

**Related Topics**
- Import Market Data in the Integrated Workbook

Import External Compensation Data in the Integrated Workbook

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

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

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

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

Generate the Workbook

Create the external data workbook in the Compensation work area.

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

Enter External Data

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

Upload External Data

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

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

Validate Changes

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

Resolve Errors

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

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

To view and resolve an error:

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

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

Related Topics

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

FAQs

How can I add external compensation data to use in workforce compensation and total compensation statements?

You can add external data from a third-party or legacy application on the Manage External Data page. Click Prepare Import Spreadsheet to use the Oracle ADF Desktop Integration Add-in for Microsoft Excel to import the data. Or, manually add the data in the Search Results section.

How can I add external compensation data for multiple assignments?

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

**allocation method**
User-selected way that a model automatically calculates workforce compensation budget amounts, compensation amounts, or targets.

**compa-ratio**
Salary as a percentage of salary range midpoint. 100 denotes salary at midpoint.

**grade step progression**
The advancement of workers through a sequence of grades or steps within a progression grade ladder, according to progression rules.

**HR**
Abbreviation for human resource.

**progression grade ladder**
A hierarchy used to group grades and define their sequence. It includes the associated rates and progression rules for each grade and step within the ladder.

**progression rule**
A set of criteria used to determine whether a worker is eligible to advance to a specific grade or step within a progression grade ladder.

**quartile**
Salary range divided into four equal parts. Quartile 1 is the lowest.

**rank**
Worker's assigned rank indicating where the individual stands with respect to others in a manager’s organization, where 1 is the highest performing, or most valuable, worker.

**ranking percentile**
Value given to a worker that represents the percentile rank among total workers ranked in a manager’s organization, where 100 is the highest ranked worker.

**ranking score**
Calculated value between 0 and 100 using all rankings given to a worker by all managers subordinate to the worker’s manager.