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## 1 Overview

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Preface

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

Using Oracle 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 the Oracle Help Center to find guides and videos.

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

You can also read about it instead.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- 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>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</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 Compensation Setup

To start an implementation of compensation a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATIONCONSULTANT_JOB) must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

Compensation Management Offerings and Functional Areas

In the Setup and Maintenance work area, use this offering to plan, allocate, and communicate compensation. Enable the following compensation functional areas for implementation:

- Base Pay
- Individual Compensation
- Workforce Compensation
- Total Compensation Statements

The following table specifies the primary functional areas of this offering. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Pay</td>
<td>Configure payroll elements, compensation frequency values, and other data for quoting and paying base pay.</td>
</tr>
<tr>
<td>Individual Compensation</td>
<td>Configure compensation plans, payroll elements, and other data for allocating off-cycle compensation to individuals and tracking compensation history.</td>
</tr>
<tr>
<td>Workforce Compensation</td>
<td>Create compensation plans and cycles used for compensating a group of workers. Configure the type of compensation allocated, the information displayed to managers, whether budgeting is used, eligibility criteria for the plan or component, and the approval hierarchy.</td>
</tr>
<tr>
<td>Total Compensation Statements</td>
<td>Configure the design, content, and delivery of a compensation statement that includes nontraditional forms of pay such as fringe benefits, cost of benefits, and paid time off, in addition to traditional forms of pay such as base pay and variable compensation.</td>
</tr>
</tbody>
</table>

Related Topics

- Plan Your Implementation
2 Lookups

Workforce Compensation Lookups

You can use lookups in a workforce compensation cycle. Edit these lookups at any time using the Manage Lookups task in the Compensation work area.

Reason Lookups

When you adjust a budget, you include a reason. The budget audit history shows this reason, along with the adjustment and other budget changes. You can add different adjustment values to the CMP_BUDGET_AUDIT_REASONS lookup type. Values that start with CMP show in audit history.

You can start using these reasons right away as they're provided with the application. But you can't change or delete them.

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

Nonmonetary Unit of Measure Lookups

You use nonmonetary units of measure throughout workforce compensation. You can change existing values or add values to the CMP_NONMONETARY_UOM lookup type. These nonmonetary units of measure are provided with the application:

- Days
- Hours
- Items
- Shares
- Units

User-Defined Column Lookups

Enable managers to select from relevant choice lists by creating columns and configuring user-defined lookup types. For example, you create a user-defined column called Up For Promotion. You configure the related user-defined
lookup type to show two values: Yes and No. Managers can use the user-defined column to indicate which workers are up for promotion.

These user-defined column lookup types are provided with the application. Their lookup codes need to be numeric.

- CMP_CWB_CUST_COL_46_LIST
- CMP_CWB_CUST_COL_47_LIST
- CMP_CWB_CUST_COL_48_LIST
- CMP_CWB_CUST_COL_49_LIST
- CMP_CWB_CUST_COL_50_LIST

The provided value is Default.

You can also create lookups, with numeric codes, to go with these columns.

**Salary Component Lookups**

Salary components itemize new or adjusted salary to reflect different reasons for the allocation. You can edit or add components to the Salary Component lookup type during initial implementation and at any later time. The following salary components are predefined:

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

To add to or edit these codes in the CMP_SALARY_COMPONENTS lookup type, search for the Manage Common Lookups task in the Search: Tasks pane or All Tasks tab search area.

**Component Itemization**

Component itemization is for notification purposes only. When component values change, the payroll element holds the new salary value calculated from the component adjustment. Payroll doesn’t receive individual component values for processing.
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.

Overview of Lookups

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

The following table contains an example of a lookup type for marital status (MAR_STATUS) that has lookup codes for users to specify married, single, or available legal partnerships.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Married</td>
<td>Not applicable</td>
</tr>
<tr>
<td>S</td>
<td>Single</td>
<td>Not applicable</td>
</tr>
<tr>
<td>R</td>
<td>Registered Partner</td>
<td>+NL</td>
</tr>
<tr>
<td>DP</td>
<td>Domestic Partner</td>
<td>-FR, AU</td>
</tr>
</tbody>
</table>

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Configuration levels
- Accessing lookups
Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option’s available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

Configuration Level

The configuration level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the configuration level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the predefined lookup codes can’t be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The configuration levels are user, extensible, and system. The following table shows the lookup management tasks permitted at each configuration level.

<table>
<thead>
<tr>
<th>Permitted Task</th>
<th>User</th>
<th>Extensible</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting a lookup type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Inserting new codes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Updating start date, end date, and enabling the lookup code</td>
<td>Yes</td>
<td>Yes, only if the code isn’t predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Deleting codes</td>
<td>Yes</td>
<td>Yes, only if the code isn’t predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Updating tags</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Updating module</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the configuration level must be system or extensible to prevent deletion.
Once the configuration level is set for a lookup type, it can't be modified. The configuration level for newly created lookup types is by default set at the User level.

### Standard, Common, and Set-Enabled Lookups

The following table shows the available types of lookups.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Lists the available codes and translated meanings.</td>
</tr>
<tr>
<td>Set-enabled</td>
<td>Associates a reference data set with the lookup codes.</td>
</tr>
<tr>
<td>Common</td>
<td>Legacy lookups or lookups that have attributes.</td>
</tr>
</tbody>
</table>

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view. Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view. These can also be lookups having attribute columns. Set-enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

### Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

### Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables. To enable lookups based on the following:

- Selecting an Enabled check box
- Specifying an enabled start date, end date, or both
- Specifying a reference data set determinant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

To view the predefined lookups and their lookup codes, use the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the permitted language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

Note: You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Related Topics
- Example of a Set-Enabled Lookup
- What's the difference between a lookup type and a value set
- Example of a Standard Lookup
- Enter or Edit Translated Text

FAQs

How can I edit lookups?

On any of the Manage Lookups pages, you can edit the existing lookup codes of a lookup type or add new lookup codes. You can edit lookups using the following tasks in the Setup and Maintenance work area:
- Manage Standard Lookups
- Manage Common Lookups
- Manage Set-enabled Lookups

Each task contains a predefined set of lookup types that are classified and stored. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its configuration level doesn't support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookup types of a kind, such as common lookups associated with the Manage Common Lookups task.

If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they're are central to an application. However, lookup types defined for a specific application are managed using the task for that application.
How can I access predefined lookups?

Search for predefined lookups using any of the manage lookups tasks.

1. In the Setup and Maintenance work area, go to any of the following tasks that contains the lookups you're looking for:
   - Manage Standard Lookups
   - Manage Common Lookups
   - Manage Set-enabled Lookups

2. Enter any of the search parameters and click Search. If you don't know the lookup type or the meaning, use the Module field to filter search results.
3. Click a lookup type to view its lookup codes.

   Tip: Click the Query By Example icon to filter the lookup codes.

Related Topics

- Use Query By Example
3 Eligibility Profiles

How Eligibility Works With Other Objects

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility. The following figure shows the relationships between eligibility components.

Eligibility Criteria

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

Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.
Associating the Profile with Objects
This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

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

Related Topics
• User-Defined Criteria

Derived Factors
Derived factors define how to calculate certain eligibility criteria that change over time, such as a person’s age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.
Derived Factor Types

Using the Manage Derived Factors task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service
- Compensation
- Hours worked
- Full-time equivalent

Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Example Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age derived</td>
<td>Select a determination rule to specify the day on which to evaluate the person’s calculated age for eligibility. Example: If the determination rule is set to the first of the year, then the person’s age as of the first of the year is used to determine eligibility.</td>
</tr>
<tr>
<td>Full-time equivalent</td>
<td>Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility. Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.</td>
</tr>
</tbody>
</table>

For derived factors pertaining to time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount
Examples of Derived Factors

The following scenarios illustrate how to define different types of derived factors:

Age

Benefits administrators frequently use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person’s age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

<table>
<thead>
<tr>
<th>Derived Factor Name</th>
<th>Greater Than or Equal To Age Value</th>
<th>Less Than Age Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age Under 25</td>
<td>1</td>
<td>25</td>
</tr>
<tr>
<td>Age 25 to 34</td>
<td>25</td>
<td>35</td>
</tr>
<tr>
<td>Age 35 to 44</td>
<td>35</td>
<td>45</td>
</tr>
<tr>
<td>Age 45 to 54</td>
<td>45</td>
<td>55</td>
</tr>
<tr>
<td>Age 55 to 64</td>
<td>55</td>
<td>65</td>
</tr>
<tr>
<td>Age 64 or Older</td>
<td>65</td>
<td>75</td>
</tr>
</tbody>
</table>

The determination rule and other settings for each age band can use the same values, as shown in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determination Rule</td>
<td>First of calendar year</td>
</tr>
<tr>
<td>Age to Use</td>
<td>Person's</td>
</tr>
<tr>
<td>Units</td>
<td>Year</td>
</tr>
</tbody>
</table>
Length of Service

You use the length of service derived factor to determine eligibility based on an employee's length of service. For example, you can create a derived factor to determine if an employee has completed 10 years of service. You can specify the start date of the length of service period using any rule in the Period Start Date Rule list:

- Adjusted service date
- Date of hire
- Original hire date
- Seniority date

If you select Seniority Date, you use the Seniority Date list to select the specific configuration rule, such as the grade seniority date, to determine the date. If you have other special requirements to calculate the length of service, you can use a formula. You indicate the end of the length of service period by using a determination rule, such as end of month, first of month, as of event date, or end of pay period. The following table shows an example of a set of length-of-service bands.

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

<table>
<thead>
<tr>
<th>Derived Factor Name</th>
<th>Greater Than or Equal To Length of Service Value</th>
<th>Less Than Length of Service Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Less Than 1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Service 1 to 4</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Service 5 to 9</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>Service 10 to 14</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>Service 15 to 19</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>Service 20 to 24</td>
<td>20</td>
<td>25</td>
</tr>
<tr>
<td>Service 25 to 29</td>
<td>25</td>
<td>30</td>
</tr>
<tr>
<td>Service 30 Plus</td>
<td>30</td>
<td>999</td>
</tr>
</tbody>
</table>
The determination rule and other settings for each length-of-service band are the same:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Period Start Date Rule</strong></td>
<td>Date of hire</td>
</tr>
<tr>
<td></td>
<td>This sets the beginning of the period being measured.</td>
</tr>
<tr>
<td><strong>Determination Rule</strong></td>
<td>End of year</td>
</tr>
<tr>
<td></td>
<td>This sets the end of the period being measured.</td>
</tr>
<tr>
<td><strong>Age to Use</strong></td>
<td>Person's</td>
</tr>
<tr>
<td><strong>Units</strong></td>
<td>Year</td>
</tr>
<tr>
<td><strong>Rounding</strong></td>
<td>None</td>
</tr>
</tbody>
</table>

**Compensation**

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

<table>
<thead>
<tr>
<th>Derived Factor Name</th>
<th>Greater Than or Equal To Compensation Value</th>
<th>Less Than Compensation Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 20000</td>
<td>0</td>
<td>20,000</td>
</tr>
<tr>
<td>Salary 20 to 34000</td>
<td>20,000</td>
<td>35,000</td>
</tr>
<tr>
<td>Salary 35 to 49000</td>
<td>35,000</td>
<td>50,000</td>
</tr>
<tr>
<td>Salary 50 to 75000</td>
<td>50,000</td>
<td>75,000</td>
</tr>
<tr>
<td>Salary 75 to 99000</td>
<td>75,000</td>
<td>100,000</td>
</tr>
<tr>
<td>Derived Factor Name</td>
<td>Greater Than or Equal To Compensation Value</td>
<td>Less Than Compensation Value</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>Salary 100 to 200000</td>
<td>100,000</td>
<td>200,000</td>
</tr>
<tr>
<td>Salary 200000 Plus</td>
<td>200,000</td>
<td>999,999,999</td>
</tr>
</tbody>
</table>

The determination rule and other settings for each compensation band are the same:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determination Rule</td>
<td>First of year</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>US Dollar</td>
</tr>
<tr>
<td>Source</td>
<td>Stated compensation</td>
</tr>
<tr>
<td>Rounding</td>
<td>Rounds to nearest hundred</td>
</tr>
</tbody>
</table>

**Eligibility Profiles**

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

The following are key aspects of working with eligibility profiles:

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

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
  - Derived factors
  - User-defined formulas
  - User-defined criteria

- Consider whether to combine criteria into one profile or create separate profiles depending on:
  - Whether the object for which you’re creating eligibility accepts only one eligibility profile or more than one
  - Performance considerations

- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

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

Specifying Profile Type, Usage, and Assignment Usage

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

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Type</td>
<td>Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants’ spouses, family members, or other individuals who qualify as dependents. All other profiles are participant profiles.</td>
</tr>
<tr>
<td>Usage</td>
<td>Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents. Selecting Global makes the profile available to multiple business process usages.</td>
</tr>
<tr>
<td>Assignment to Use</td>
<td>Determines the assignment that the eligibility process evaluates for the person</td>
</tr>
<tr>
<td></td>
<td>• Select Specific assignment when the usage is Compensation or Performance.</td>
</tr>
<tr>
<td></td>
<td>• Select a value that includes benefit relationship when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments.</td>
</tr>
<tr>
<td></td>
<td>• Select one of the following values for all other usages, such as total compensation statements:</td>
</tr>
<tr>
<td></td>
<td>• Any assignment - enterprise</td>
</tr>
<tr>
<td></td>
<td>• Employee assignment only - enterprise</td>
</tr>
</tbody>
</table>
### Defining Eligibility Criteria
Criteria defined in an eligibility profile are divided into categories:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>Includes gender, person type, postal code ranges, and other person-specific criteria.</td>
</tr>
<tr>
<td>Employment</td>
<td>Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria.</td>
</tr>
<tr>
<td>Derived factors</td>
<td>Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.</td>
</tr>
<tr>
<td>Other</td>
<td>Other: Includes miscellaneous and user-defined criteria.</td>
</tr>
<tr>
<td>Related coverage</td>
<td>Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

**Viewing the Criteria Hierarchy**

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

**Related Topics**
- User-Defined Criteria

**Single or Multiple Eligibility Profiles**

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

**Allowable Number of Eligibility Profiles**

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

<table>
<thead>
<tr>
<th>Only One Profile</th>
<th>One or More Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Checklist tasks</td>
<td>• Benefits offerings</td>
</tr>
<tr>
<td>• Variable rate profiles</td>
<td>• Individual and workforce compensation plans</td>
</tr>
<tr>
<td>• Variable coverage profiles</td>
<td>• Performance documents</td>
</tr>
<tr>
<td>• Total compensation statements</td>
<td>• Goal plans or mass goal assignments</td>
</tr>
<tr>
<td>• Absence types</td>
<td>• Absence plans</td>
</tr>
</tbody>
</table>

**Efficiency and Performance in the Benefits Hierarchy**

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
• Plans in program
• Plans
• Options in plans that are in programs

However, it’s sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

<table>
<thead>
<tr>
<th>Level</th>
<th>Eligibility Profile Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>Exclude employees who do not have an active assignment.</td>
</tr>
<tr>
<td>Plan type in program</td>
<td>Exclude employees who do not have a full-time assignment.</td>
</tr>
<tr>
<td>Plan</td>
<td>Exclude employees whose primary address is not within a defined service area.</td>
</tr>
</tbody>
</table>

Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

**Related Topics**
- Best Practices for Setting Up Eligibility in a Benefits Hierarchy

Create a Participant Eligibility Profile

This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

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>What is the profile type?</td>
<td>Participant</td>
</tr>
<tr>
<td>What type of object is associated with this profile?</td>
<td>Variable rate for benefits offering</td>
</tr>
<tr>
<td>What types of eligibility criteria are defined in this profile?</td>
<td>Age derived factor (must have been previously defined) Uses Tobacco criteria</td>
</tr>
</tbody>
</table>
Decisions to Consider | In this Example
--- | ---
Should persons meeting these criteria be included or excluded from eligibility? | Included

The following figure shows the tasks to complete in this example:

Prerequisite
- Create derived factors for age bands

Create participant eligibility profile

Add derived factor for age

Add criteria for tobacco use

Associate eligibility profile with variable rate profile

In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

Prerequisites
1. Create an age derived factor for ages less than 30.

Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click Manage Eligibility Profiles to open the Manage Eligibility Profiles page.
2. On the Create menu, select Create Participant Profile.
3. In the Eligibility Profile Definition section, complete the fields as shown in this table.
### Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

1. In the Eligibility Criteria section, select the **Derived Factors** tab.
2. On the Age tab, click **Create**.
3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequence</td>
<td>1</td>
</tr>
<tr>
<td>Age</td>
<td>Select the derived factor that you previously defined for ages under 30</td>
</tr>
<tr>
<td>Exclude</td>
<td>Make sure that it is not selected</td>
</tr>
</tbody>
</table>

### Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

1. Select the **Personal** tab.
2. On the Uses Tobacco tab, click **Create**.
3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequence</td>
<td>1</td>
</tr>
</tbody>
</table>
Field | Value
--- | ---
Tobacco Use | None
Exclude | Make sure that it is not selected

4. Click **Save and Close**.

### Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Benefits Rates** to open the Manage Benefits Rates page.
2. Select the **Variable Rates** tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.
6. Click **Save and Close**.

**Related Topics**
- **Create a Benefit Variable Rate**

### Examples of Eligibility Profiles

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including the Setup and Maintenance work area and the Plan Configuration work area.
2. Associate the eligibility profile with the relevant object, such as a benefit plan.

### Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Usage</td>
<td>Benefits</td>
</tr>
</tbody>
</table>
### Field and Value

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Type</td>
<td>Participant</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Criteria Type</th>
<th>Name</th>
<th>Values</th>
<th>Select Exclude Check Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>Assignment Category</td>
<td>Full-Time</td>
<td>No</td>
</tr>
<tr>
<td>Derived Factor</td>
<td>Age</td>
<td>Select an age derived factor for the age band of 65 and older</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Usage</td>
<td>Compensation, or Global</td>
</tr>
<tr>
<td>Profile Type</td>
<td>Participant</td>
</tr>
<tr>
<td>Assignment to Use</td>
<td>Specific Assignment</td>
</tr>
</tbody>
</table>

The following table provides the values for the eligibility criteria for each rating category.

<table>
<thead>
<tr>
<th>Criteria Type</th>
<th>Name</th>
<th>Values</th>
<th>Select Exclude Check Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>Performance Rating</td>
<td>Select the performance template and rating name, and then select the highest rating value</td>
<td>No</td>
</tr>
</tbody>
</table>
Checklist Task Eligibility

A new hire checklist contains tasks that don’t apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn’t apply to workers in India.

The following table provides the values for the eligibility profile definition.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Usage</td>
<td>Checklist</td>
</tr>
<tr>
<td>Profile Type</td>
<td>Participant</td>
</tr>
</tbody>
</table>

The following table provides the values for the eligibility criteria.

<table>
<thead>
<tr>
<th>Criteria Type</th>
<th>Name</th>
<th>Values</th>
<th>Select Exclude Check Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>Work Location</td>
<td>India</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Related Topics
- How can I restrict benefits enrollment opportunities based on provider location
- How to Configure Grandfathered Benefits

FAQs

What happens if I include multiple criteria in an eligibility profile?
If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.
If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

What happens if I don't select the Required option when I add an eligibility profile to an object?
If you add only one eligibility profile to an object, then the criteria in that profile must be satisfied, even if the Required option isn't selected.
If you add multiple eligibility profiles, the following rules apply:

- If all profiles are optional, then at least one of the profiles must be satisfied.
- If all profiles are required, then all of the profiles must be satisfied.
- If some but not all profiles are required, then all required profiles must be satisfied and at least one optional profile must also be satisfied.
4 Payroll for Third-Party HR

Define Elements, Balances, and Formulas

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

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

**Required Tasks**

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

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

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

**Before You Begin**

The Workforce Deployment and Compensation Management offerings include the Define Elements, Balances, and Formulas task list. Before you start the required payroll tasks, complete the tasks these offerings contain, as shown in the following table.

<table>
<thead>
<tr>
<th>Task</th>
<th>Use To</th>
<th>Why It’s Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Legal Entities</td>
<td>Create payroll statutory units.</td>
<td>Ensures that hiring employees automatically creates payroll relationship records.</td>
</tr>
<tr>
<td>Manage Legal Entity HCM Information</td>
<td>Associate a legislative data group with each payroll statutory unit.</td>
<td>As above.</td>
</tr>
<tr>
<td>Manage Features by Country or Territory</td>
<td>Select Payroll Interface as the extension for any countries or territories where you extract HR data to send to a third-party payroll provider.</td>
<td>Ensures that you use the appropriate element templates to create earnings.</td>
</tr>
</tbody>
</table>
### Configure Legislations for Human Resources

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

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

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

### Manage Elements

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

<table>
<thead>
<tr>
<th>Source Application</th>
<th>Element Purpose</th>
<th>Requirements</th>
</tr>
</thead>
</table>
| Compensation       | • Earnings and deduction elements, such as bonuses, overtime earnings, and voluntary deductions.  
                    • Information elements to load user-defined data to use during a workforce compensation cycle. | Required for compensation plans and base pay, no matter which HR and payroll applications you're using. |
| Benefits           | • Deduction elements to record activity rate calculation results, such as:  
                    o Employee contributions and employer distributions for medical options  
                    o Flex credits for flex benefits  
                    • Earnings elements if you want to disburse unused credits as cash. | Required if you use element entries to communicate benefits rate information to any payroll application.  
**Note:** You must select Payroll Relationship as the employment level. |
| Time and Labor     | Earnings elements with input value of Hours. | Required if you pay worked time based on time card entries. |
Manage Payroll Definitions

Employees' employment terms or assignments include their assigned payrolls. The payroll definition supplies the payroll period frequency and end dates, which some applications use for calculations. This table shows which applications require payroll definitions.

<table>
<thead>
<tr>
<th>Application</th>
<th>Payroll Definition Required?</th>
<th>Usage Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Payroll Interface</td>
<td>Yes</td>
<td>N/A</td>
</tr>
<tr>
<td>Compensation</td>
<td>Yes</td>
<td>N/A</td>
</tr>
<tr>
<td>Benefits</td>
<td>Optional</td>
<td>Required to use the payroll period frequency to calculate communicated rates or values passed to payroll.</td>
</tr>
<tr>
<td>Time and Labor</td>
<td>Optional</td>
<td>Required to pass time entries to payroll calculation cards for payroll processing or for extract to a third-party payroll application.</td>
</tr>
<tr>
<td>Absence Management</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Manage Consolidation Groups

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

Other Payroll-Related Setup Tasks

Your implementation might require other tasks in the Define Elements, Balances, and Formulas task list, as shown in the following table.
### Task | Requirements
--- | ---
Manage Organization Payment Methods | If you want to record personal payment methods for your employees, you must create organization payment methods and associate them with your payroll definitions. Organization payment methods define the combination of payment type and currency to use for payments to employees or external parties.
Manage Element Classifications | Primary element classifications are predefined. If you run the Calculate Gross Earnings process (provided with Global Payroll Interface), you might create subclassifications to feed user-defined balances.
Manage Fast Formulas | You can write formulas for a number of uses, including:
- Validating user entries into element input values
- Configuring compensation, benefit, and accrual plan rules
- Calculating periodic values for gross earnings and defining element skip rules for the Calculate Gross Earnings process (provided with Global Payroll Interface)
Manage Balance Definitions | If you're using Global Payroll Interface, creating earnings elements creates balances automatically. You can edit these generated balance definitions.
If you're using the Calculate Gross Earnings process, you may want to create additional balances for extracts or reporting.
Manage Object Groups | You can create object groups to specify subsets of elements or payroll relationships to include in a report or process, such as the Calculate Gross Earnings process.

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

### Payroll Definitions

Payroll definitions contain calendar and offset information used to determine when you calculate and cost payments. Payroll period types, such as weekly or monthly, determine the interval at which you pay employees. Use the Manage Payroll Definitions task in the Payroll Calculation work area to specify payment frequency, processing schedule, and other parameters for a particular payroll.

Create at least one payroll definition for each payroll period type you use to pay employees. For example, to pay employees semimonthly, create a payroll definition using the semimonthly payroll period type, ensuring that tax calculations and other calculations produce correct results for those employees.

### Creating Payroll Definitions

When you create a payroll definition, the application generates the complete payroll schedule based on the payroll period type, the offsets or calendar adjustments, and the number of years that you specify. Each payroll in the schedule
is assigned a unique name. Assign employees to payroll definition on the Manage Payroll Relationships page. You can configure the payroll calendar by increments of ten or fewer years. Create a payroll definition to replace one that expired or end-dated.

Each payroll must belong to a consolidation group, which the application requires for processing purposes and a legislative data group so make sure these exist before creating your payroll definition.

Modifying Payroll Definitions

When you modify a payroll definition, the application adjusts the payroll schedule based on the values you have modified. Modify an existing payroll definition to increase the number of years and generate more payroll time periods that configure the payroll calendar.

| Note: Payroll names in the payroll schedule are unique. You can edit the generated payroll names, but you must ensure they're unique within the payroll definition. |

Related Topics

- Create Payroll Definitions
- Overview of Payroll Definitions

Elements

Some elements are predefined. You can also create other elements to match your requirements. Each element belongs to a primary classification, according to its purpose, which determines the template you use to create it. Use the template to create the elements and depending on your country extension, you create the associated items required for payroll processing.

Use the elements to represent these components:

- Earnings, such as salary, wages, and bonuses
- Compensation, such as employee stock purchase and insurance plans
- Absences from work
- Tangible items distributed to persons, such as tools, uniforms, mobile phones, or computers
- Statutory deductions, such as taxes, voluntary deductions, contributions to charities or savings plans, and involuntary deductions, such as court orders and pretax deductions
- Employer taxes and other employer liabilities

| Note: You can associate a time card with a results element that has the costing definition. On the Element Summary page, you can use the base element attribute to directly link a time element to the result element. |

Use Predefined Elements

The predefined elements are specific to your country or territory. They typically include deductions for tax and wage attachments. You can't make any changes to these predefined elements. However, you must create eligibility records for them.
Create Element

You can create as many earnings and deduction elements as you require using the Manage Elements task. Create nonrecurring element entries for your workers that aren't assigned to a payroll. The application creates the nonrecurring element entries as a single data entry. Let's assume that, effective 6th March, you create an element entry for a worker. In this case, the element entry has a start and end date of 6th March.

You select the element classification and category that determine the template of questions. You answer the questions to specify the details of the element you want to create. The items that the template generates can include multiple elements, input values, formulas, balances, and other items.

**Note:** The template you use to create elements also depends on the configuration selected for your country or territory on the Manage Features by Country or Territory page. For example, if the country extension is set to Payroll, you use a template that generates all the items required for payroll processing. If the country extension is set to Human Resources or None, you use a basic template that generates the elements only. However, if you select an element classification, such as Standard Earnings, Supplemental Earnings, Direct Payments and Taxable Benefits, the basis template creates input values for Amount, Periodicity, and Full-Time Equivalent.

You can configure any of the generated items to match your specific business requirements. For example, you can add input values, edit the formulas, or add a status processing rule to use a different formula for certain assignment statuses. You must also create element eligibility records for the elements.

This table explains the purpose of the items that you use when creating element.

<table>
<thead>
<tr>
<th>Items</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input Values</td>
<td>Defines the entry values available on each entry of this element, such as hours worked or amount.</td>
</tr>
<tr>
<td>Element Eligibility Records</td>
<td>Defines the eligibility criteria a worker’s employment record must meet to be eligible for the element. For example you can use grade, payroll, salary basis, or organization as eligibility criteria.</td>
</tr>
<tr>
<td>Status Processing Rules</td>
<td>Identifies the formula the payroll run uses to process the element, and how to handle the formula results.</td>
</tr>
<tr>
<td>Related Formulas and Related Elements</td>
<td>Identifies additional elements and formulas created by the template for payroll processing.</td>
</tr>
<tr>
<td>Related Balances</td>
<td>Identifies the balances created by the element template for this element.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Create Earnings Elements for Payroll
- Formula Result Rules for Elements
Element Input Values

An **element's input values** define the entry values available on each entry of an element. Each input value has a unit of measure, such as money or date. Input values can include validations and conditions to control the data entry of the element entry assigned to a person. For example, an earnings element may have an input value for hours worked, which is required and has a unit of measure of number.

When you create an element, some input values are created automatically depending on your country extension and the element classification. You can create additional input values for any element, as needed.

**Input Value Options**

For each input value created, you can modify these attributes:

<table>
<thead>
<tr>
<th><strong>Field Value</strong></th>
<th><strong>What You Do</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Sequence</td>
<td>Enter a number to control the display order of the entry value on element entries.</td>
</tr>
<tr>
<td>Special Purpose</td>
<td>Select how the input value is to be used. For example, you can indicate that it holds a percentage value, a rate, or third-party payee details. This value assists with processing the input value based on what type of information it holds.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Select the value that describes the type of value the entry value can hold, such as number or character.</td>
</tr>
<tr>
<td>Displayed</td>
<td>Select to display the input value on the element entry.</td>
</tr>
<tr>
<td>Allow User Entry</td>
<td>Select to enter values on element entries.</td>
</tr>
<tr>
<td>Required</td>
<td>Select to make the input value a required entry value on the element entry. If you select <strong>Required</strong>, you must also select <strong>Displayed</strong> and <strong>Allow User Entry</strong>.</td>
</tr>
<tr>
<td>Create a Database Item</td>
<td>Select if you want to make the values available for formulas or HCM extract.</td>
</tr>
<tr>
<td>Rate Formula</td>
<td>Select a rate calculation formula, for example to return a value from a user-defined table. This option only applies to the Primary input value for elements associated with rate definitions that have the Element method and a contributor type of Amount. If you select a formula, you must not select <strong>Allow User Entry</strong>.</td>
</tr>
<tr>
<td>Default</td>
<td>Enter a value that appears as the default value for this entry value in element entries, if needed.</td>
</tr>
<tr>
<td>Apply default at runtime</td>
<td>Select to apply the default value when you run the payroll process, rather than when you create the element entry. This selection ensures you use the latest value on the date of the payroll run. You can manually override the default value on the element entry.</td>
</tr>
</tbody>
</table>
### What You Do

<table>
<thead>
<tr>
<th>Field Value</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum</td>
<td>Enter a minimum value, if needed.</td>
</tr>
<tr>
<td>Maximum</td>
<td>Enter a maximum value, if needed.</td>
</tr>
<tr>
<td>Validation Formula</td>
<td>Enter a formula that validates the entry value entered on element entries, if needed.</td>
</tr>
<tr>
<td>Validation Source</td>
<td>Use with the other input value options to select the valid validation method, such as lookups or formulas.</td>
</tr>
<tr>
<td>Lookup Type</td>
<td>Specify a lookup type to provide a list of values for an entry value. This option is available for input values of type Character only.</td>
</tr>
<tr>
<td>Warning or Error</td>
<td>Use when you’re validating the input value or entering a minimum or maximum value. It specifies whether a warning or an error displays if the entry fails the validation condition or doesn’t meet the minimum or maximum value indicated.</td>
</tr>
<tr>
<td>Reference</td>
<td>Use to associate a balance context with the run result.</td>
</tr>
<tr>
<td></td>
<td>For example, you can associate a context, such as jurisdiction, with an element. Create an input value for jurisdiction and select the jurisdiction context in the Reference field. Then the run result value of the input value works as a context value when updating the balance.</td>
</tr>
<tr>
<td></td>
<td>If you select a reference, then the lookup type and validation source values should be automatically set to the reference context. You must provide the Reference field first for the validation source value to be automatically populated.</td>
</tr>
<tr>
<td>Value Set</td>
<td>Specify a value set to provide a dynamic list of values for an entry value. This option is available for input values of type Character only.</td>
</tr>
</tbody>
</table>

**Caution:** Once an element is processed, you can’t update certain input value attributes, such as unit of measure. This restriction ensures that you can’t change attributes that would invalidate prior results.

This table provides examples of the allowable formats, depending on the unit of measure (UOM) specified for the entry value.

<table>
<thead>
<tr>
<th>Unit of Measure</th>
<th>Sample Entry Value</th>
<th>Display in Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Character</td>
<td>C</td>
<td>Complete</td>
</tr>
<tr>
<td>Integer</td>
<td>12345</td>
<td>12,345</td>
</tr>
<tr>
<td>Number</td>
<td>12345.6789</td>
<td>12,345.6789</td>
</tr>
</tbody>
</table>
### Unit of Measure

<table>
<thead>
<tr>
<th>Unit of Measure</th>
<th>Sample Entry Value</th>
<th>Display in Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>0.123456789</td>
<td>0.123456789</td>
</tr>
<tr>
<td></td>
<td>123</td>
<td>123</td>
</tr>
<tr>
<td></td>
<td>0.123</td>
<td>0.123</td>
</tr>
<tr>
<td>Money</td>
<td>12345</td>
<td>12345.00</td>
</tr>
<tr>
<td></td>
<td>-12345.67</td>
<td>&lt;12345.67&gt;</td>
</tr>
<tr>
<td>Hours in decimal format, 1 place</td>
<td>12345</td>
<td>12345.00</td>
</tr>
<tr>
<td>Hours in decimal format, 2 places</td>
<td>12345</td>
<td>12345.00</td>
</tr>
<tr>
<td>Hours in decimal format, 3 places</td>
<td>12345</td>
<td>12345.000</td>
</tr>
<tr>
<td>Hours expressed as a numeric value</td>
<td>12345</td>
<td>12345</td>
</tr>
<tr>
<td>Hours and minutes expressed as numeric values</td>
<td>12345</td>
<td>12345:00</td>
</tr>
<tr>
<td>Hours, minutes, and seconds expressed as numeric values</td>
<td>12345</td>
<td>12345:00:00</td>
</tr>
<tr>
<td>Date</td>
<td>2016-06-21</td>
<td>21-Jun-2016</td>
</tr>
<tr>
<td>Time</td>
<td>13:05</td>
<td>1:05 PM</td>
</tr>
</tbody>
</table>

**Note:** Display values can be derived from the meaning attribute of the view object. For example if you enter C as a value for the Character UOM, it displays as **Complete**. Conversion to display formats is based on the profile option value and locale.

**Related Topics**

- **How Element Setup Affects Entries and Their Values**
- **Use a Value Set for an Element Input Value**
- **Create and Edit Profile Options**

## Element Eligibility

Use element eligibility to determine which people are eligible for an element. To determine eligibility, you select the criteria that people must receive entries of the element.
In these examples, you restrict who can receive an element entry:

- Your enterprise provides company cars only to people in the sales or customer support departments. You create two eligibility records, and use the Department field to specify the eligibility criteria. Select Sales Department for one record and Customer Support for the second record.
- Your enterprise offers a production bonus to people who work full-time in production and are on the weekly payroll. You create one eligibility record and select Full-time regular in the Employment Category field, Production in the Department field, and Weekly in the Payroll field.

### Eligibility Criteria

You can define element eligibility using these criteria.

<table>
<thead>
<tr>
<th>Level</th>
<th>Available Criteria</th>
</tr>
</thead>
</table>
| Payroll Relationship | Payroll Statutory Unit  
|                 | Relationship Type                                                                  |
| Items          | Legal Employer                                                                      |
|                | Department in which the person works                                                |
|                | Job, for example, associate professor or secretary                                   |
|                | Grade                                                                              |
|                | Employment Category                                                                |
|                | People Group                                                                        |
|                | Legal Employer                                                                      |
|                | Department, same as in Items                                                        |
|                | Job, same as in Items                                                               |
|                | Grade                                                                              |
|                | Employment Category                                                                |

**People Group:** To set up logical entity specific people group, on the Create Element Eligibility page, select the required values in these options:

- Legal Employer
- People Group

If you don’t select a legal entity as a criteria, then the application looks for the people group associated at the enterprise level.
<table>
<thead>
<tr>
<th>Level</th>
<th>Available Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>By default, the enterprise level people group is available.</td>
</tr>
</tbody>
</table>

**Note:** You set up all the people groups that are appropriate for your enterprise. For example, you could decide to group people by company within a multi-company enterprise, and by union membership.

- Location of person’s office
- Position, which is a class of job performed in a particular organization, for example, associate professor of chemistry, or finance department secretary.
- Payroll
- All payrolls eligible
- Bargaining Unit
- Collective Agreement
- Union Member

**Tip:** You must define element eligibility for every element, including predefined elements. If you want the element to be available to all workers, add an eligibility name and save the element eligibility record with no additional criteria selected. This is the usual practice for compensation and benefit elements where you determine eligibility using eligibility profiles.

### Multiple Rules of Eligibility

You can define more than one eligibility record for each element, but there must be no overlap between them.

For example, you can create one record for the combination of grade A and the job of accountant. However, you can’t create one record for grade A and a second for the job of accountant. These rules would imply that an accountant on grade A is eligible for the same element twice.

If you have more than one element eligibility record, you can enter different default values and costing information for each eligibility group.

### How You Maintain Elements

After you create and use an element, you’re limited on updates you can make to it. This ensures the integrity of the element for retroactive processing and the balances of the input values. You can’t remove existing input values or add new ones if you have created entries for the element. To add an input value to an element before you create any element entries, set your effective date to the element’s start date.
You can make these changes to an element that has been previously processed:

- Change a required input value to be optional.
- Alter the sequence in which input values appear on the Element Entries page.
- Change the input value validation rules for minimum, maximum, lookup, or formula.
- Change your specification of which input values create database items.
- Change the reporting name. However, the database items created for the element continue to use the original name.

For existing elements that don’t have associated element eligibility, you can now make updates to these attributes in the correction mode.

- Allow multiple entries in same period
- Latest Entry Date
- Output Currency
- Process once per period

Let’s assume that in the correction mode, you make updates to an element attribute that has track changes enabled. In such a case, all of the date effective records get updated with the change.

**Example:**

An element has these two date-effective records:

- 01-Jan-2010 to 31-Dec-2017
- 01-Jan-2018 to 31-Dec-4712
And for that element, the value of **Allow multiple entries in same period** option is **N**. Effective 15-Jun-2018, you change the value of this option from **N** to **Y**. Then, as the figure shows, the application updates both the records with the value **Y**.

**Allow Multiple Entries**

Edit the **Allow multiple entries in same period** option from **N** to **Y** even if element entries and run results exist for that element.

However, you can't edit this option in these scenarios:

- If the element is target of **Stop Entry** rules.
- If the value of the **Standard Link** option is **Y**.
- If the element is a target of indirect formula result rules.

As this figure shows, you can't change the value from **Y** to **N**. This is because such an action invalidates the existing entries and possibly could impact retroactive processing.
Termination Rule
You can update the termination rule of an element even if element entries or run results exists for that element. Such updates don’t affect the existing element entries, but impact only new element entries.

In the Latest Entry Date field, you can change a lower element definition date to a higher element definition date. However, you can’t change a higher element definition date to a lower element definition date.

This change isn’t applicable to time definitions that you define.

Output Currency
You can update the Output Currency field to a required currency under these circumstances.

- If the element isn’t used
- There isn’t element eligibility for that element
- No balances exist for this element

Process Once Per Period
Use the Process once per period option to check if the element entry has been processed or not.

As this figure shows, modify this field both from Y to N and N to Y even if element entries or run results exists.

If the value of the option is Y and the element entry is already processed in the period, then the application doesn’t process it again.

If the value of the option is N, then the application processes the element entry even if it’s already processed in the run.
As this figure shows, depending upon the value of the option, the application processes the element entry.

![Diagram showing the process of element entry]

**Maintain Element Eligibility**

After saving an *element eligibility* record, you can only make certain changes. You can’t update the eligibility criteria. This table summarizes the actions you can take.

<table>
<thead>
<tr>
<th>Action</th>
<th>What’s The Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the input value default values and validation</td>
<td>These changes affect all new entries, and updates to existing entries. Changes to runtime defaults affect existing entries too.</td>
</tr>
<tr>
<td>Delete the element eligibility record</td>
<td>The application automatically ends all existing recurring entries when you end the element’s eligibility.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can't delete the element eligibility record if any nonrecurring entries exist at the date you want to end the record. You must delete existing entries before you end the element’s eligibility.</td>
</tr>
</tbody>
</table>

**Create Compensation Payroll Elements**

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

- Recurring base pay, such as annual salaries and hourly earnings
- Recurring payments, such as an allowance
- Nonrecurring payments, such as a bonus or stock grant
Stocks awarded by individual and workforce compensation plans use element entries. Stocks loaded from third-party suppliers using the Manage Stock Grants task don’t use element entries.

- Recurring voluntary deductions, such as savings plans or charitable contributions

Task Summary

To define US LDG elements, complete these tasks.

1. Create the US LDG element.
2. Enter element and report names and specify if the element recurs.
3. Select the calculation rule, default periodicity, and conversion rule if you’re configuring standard earnings elements for use with Oracle Fusion Global Payroll or Payroll Interface.
4. Double-check your selections and submit the element.
5. Make sure that the correct input value has the Primary input value special purpose
6. Hide the generated input values that don’t apply, when the element is used with individual compensation plans.
7. Set minimum and maximum amounts for:
   - Standard earnings elements with a Regular Not Worked secondary classification
   - Supplemental earnings
8. Set up the element so everyone is eligible to use it.

Use the default values except where the procedure indicates otherwise.

Create the US LDG Element

In the Compensation work area, complete these steps using the Manage Elements task.

1. Click the Create icon.
2. On the Create Element dialog box, complete these steps:
   a. Select a US LDG.
   b. Select the primary classification that matches the use of the payroll element. You see different classifications listed depending on the LDG that you selected. This table shows the primary classifications you can use after you select a US LDG.

<table>
<thead>
<tr>
<th>Element Use</th>
<th>Primary Classification</th>
</tr>
</thead>
</table>
| Recurring base pay, such as annual salaries and hourly earnings | Standard Earnings
   - For salary elements, compensation posts the annual salary amount to the element entry, regardless of the salary basis frequency. If you want the element entry to hold the salary amount in the frequency of the salary basis, use an information element. |
| Recurring payments, such as an allowance         | Standard Earnings                                                                      |
| Nonrecurring payments, such as a bonus or stock grant | Supplemental Earnings                                                                  |
c. Optionally select the secondary classification that corresponds to the selected primary classification of the US LDG. When the selections don’t really match your purpose, you can skip this step.

<table>
<thead>
<tr>
<th>Element Use</th>
<th>Secondary Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring base pay, such as annual salaries and hourly earnings</td>
<td>Regular</td>
</tr>
<tr>
<td>Recurring payments, such as an allowance</td>
<td>Regular Not Worked</td>
</tr>
<tr>
<td>Nonrecurring payments, such as a bonus or stock grants</td>
<td>Awards and Prizes, Bonus, another relevant option, or leave it blank</td>
</tr>
<tr>
<td>Recurring voluntary deductions, such as savings plans or charitable contributions</td>
<td>Select the relevant option. Otherwise, leave it blank.</td>
</tr>
</tbody>
</table>

d. Click Continue.

Enter Element and Report Names, Specify If the Element Recurs

On the Basic Information page, complete these steps.

1. Enter a descriptive name that lets you and others easily figure out the use or purpose of the element.

<table>
<thead>
<tr>
<th>Element Use</th>
<th>Sample Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring base pay, such as annual salaries and hourly earnings</td>
<td>US Annual Salary or California Hourly Wages</td>
</tr>
<tr>
<td>Recurring payments, such as an allowance every pay period</td>
<td>Gym Allowance or Car Allowance</td>
</tr>
<tr>
<td>Nonrecurring payments, such as a bonus or stock grant</td>
<td>Quarterly Sales Award or Stock Grant</td>
</tr>
<tr>
<td>Recurring voluntary deductions, such as savings plans or charitable contributions</td>
<td>Red Cross Contribution</td>
</tr>
</tbody>
</table>
2. Complete these basic information fields using the specified values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Name</td>
<td>Enter the name that you want to show on reports, including payslips, for this earnings or deduction payroll element. Reporting names need to be unique for elements that you add to compensation history.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>1/1/1951</td>
</tr>
<tr>
<td>Enter an early date so that the element is available for use immediately in your salary bases, and individual and workforce compensation plans.</td>
<td></td>
</tr>
<tr>
<td>What is the earliest entry date for this element?</td>
<td>First Standard Earning Date</td>
</tr>
<tr>
<td>What is the latest entry date for this element?</td>
<td>This date determines how element entries process after a person is terminated or transferred to another payroll. Select the value that fits your business process.</td>
</tr>
<tr>
<td>At which employment level should this element be attached?</td>
<td>For salary elements, match the employment level to the level where the legal employer holds worker salaries.</td>
</tr>
</tbody>
</table>

3. Specify whether this element recurs each payroll period or requires an explicit entry (nonrecurring).

<table>
<thead>
<tr>
<th>Element Use</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring base pay, such as annual salaries and hourly earnings</td>
<td>Recurring (default)</td>
</tr>
<tr>
<td>Recurring payments, such as an allowance</td>
<td>Recurring (default)</td>
</tr>
<tr>
<td>Nonrecurring payments, such as a bonus or stock grant</td>
<td>Nonrecurring</td>
</tr>
<tr>
<td>Recurring voluntary deductions, such as savings plans or charitable contributions</td>
<td>Recurring (default)</td>
</tr>
</tbody>
</table>

4. To accept the remaining default values, click Next.
Select the Calculation Rule, Default Periodicity, and Conversion Rule

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

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

<table>
<thead>
<tr>
<th>Element Use</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring base pay, such as annual salaries and hourly earnings</td>
<td>Flat amount</td>
</tr>
<tr>
<td></td>
<td>If you want to store percentages for use in calculations of a rates-based salary basis, select Factor.</td>
</tr>
<tr>
<td>Recurring payments, such as an allowance</td>
<td>Flat amount</td>
</tr>
<tr>
<td>Nonrecurring payments, such as a bonus or stock grant</td>
<td>Flat amount</td>
</tr>
<tr>
<td>Recurring voluntary deductions, such as savings plans or charitable contributions</td>
<td>Flat amount or Percentage of Earnings</td>
</tr>
</tbody>
</table>

2. Select the default periodicity, which is the frequency that the application stores the amount in.

<table>
<thead>
<tr>
<th>Element Use</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring base pay, such as annual salaries and hourly earnings</td>
<td>The value should be the same as the salary basis frequency, such as:</td>
</tr>
<tr>
<td></td>
<td>◦ Hourly</td>
</tr>
<tr>
<td></td>
<td>◦ Weekly</td>
</tr>
<tr>
<td></td>
<td>◦ Semimonthly</td>
</tr>
<tr>
<td></td>
<td>◦ Monthly</td>
</tr>
<tr>
<td></td>
<td>◦ Semiannually</td>
</tr>
<tr>
<td></td>
<td>◦ Annually</td>
</tr>
<tr>
<td>Recurring payments, such as an allowance</td>
<td>The typical value is monthly.</td>
</tr>
<tr>
<td>Nonrecurring payments, such as a bonus or stock grant</td>
<td>Typical values are:</td>
</tr>
<tr>
<td></td>
<td>◦ Quarterly</td>
</tr>
<tr>
<td></td>
<td>◦ Annually</td>
</tr>
<tr>
<td></td>
<td>◦ Periodically</td>
</tr>
<tr>
<td>Element Use</td>
<td>Value</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Recurring voluntary deductions, such as savings plans or charitable</td>
<td>Typically the same periodicity as base pay, such as Annually or Monthly</td>
</tr>
<tr>
<td>contributions</td>
<td></td>
</tr>
</tbody>
</table>

### 3. Select the conversion rule for the element.

<table>
<thead>
<tr>
<th>Conversion Rule</th>
<th>Calculation</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Standard Rate Annualized</strong></td>
<td>a. Convert the source amount and periodicity to an annual value using default values of 2080 hours, 260 working days.</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Convert the amount to the required periodicity and rate.</td>
<td></td>
</tr>
<tr>
<td><strong>Standard Rate Daily</strong></td>
<td>a. Calculate a daily rate using default value 260 working days.</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Convert the amount to the required output periodicity and rate.</td>
<td></td>
</tr>
<tr>
<td><strong>Standard Working Hours Rate Annualized</strong></td>
<td>a. Convert the source amount and working hours to an annual value, using the employee’s standard working hours.</td>
<td>Scenario: The employee works 40 hours a week with a monthly salary of 1000 US dollars.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Calculation: ((1000 \times 12) / (40.00 \times 52) = 5.77) an hour</td>
</tr>
<tr>
<td><strong>Assignment Working Hours Rate Annualized</strong></td>
<td>a. Convert the source amount and working hours to an annual value, using the employee’s working hours.</td>
<td>Scenario: The employee works 40 hours a week, with a 37.5 standard working hours a week, and a monthly salary of 1000 US dollars.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Calculation: ((1000 \times 12) / (37.50 \times 52) = 6.15) an hour</td>
</tr>
<tr>
<td><strong>Periodic Work Schedule Rate Annualized</strong></td>
<td>a. Convert the monetary value and work schedule to an annual value, using the employee’s work schedule for the payroll period for daily and hourly conversions.</td>
<td>Scenario for an employee assigned a monthly payroll:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o The employee has a monthly salary of 1000 US dollars.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o The formula checks the work schedule details for the month.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Daily conversion calculation: 1000 a month / 20 days in the month = 50</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For an employee not assigned a payroll:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The calculation uses the weekly rate and converts the result to an annual amount. The calculation then divides the annual</td>
</tr>
</tbody>
</table>
4. Accept the default values for the remaining rules by clicking **Next**. If you use Global Payroll or Payroll Interface, configure additional details for base pay elements, such as proration and retroactive changes.

### Double-Check Your Selections and Submit the Element

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

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

### Review Element Summary Input Values and Set Minimum and Maximum Amounts

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

- Make sure that the expected input value has **Special Purpose** set to **Primary input value**. Review pages and notifications for individual compensation plans show only the primary input value.
- For each input value that doesn't apply to the plan, make sure that the **Displayed** and **Allow User Entry** check boxes aren't selected.

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

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

Optional minimum and maximum value set up:

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

<table>
<thead>
<tr>
<th>Value</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warning</td>
<td>Show a message to users when they enter an amount that is below the minimum value or above the maximum value, if set. This usage enables them to still continue with their submissions.</td>
</tr>
<tr>
<td>Error</td>
<td>Show a message to users when they enter an amount that is below the minimum value or above the maximum value, if set. This usage prevents them from continuing until they enter an amount that's within the specified limits.</td>
</tr>
</tbody>
</table>
Make the Element Eligible for Everyone to Use

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

<table>
<thead>
<tr>
<th>Object</th>
<th>Eligibility Determination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base pay earnings and salary rate elements</td>
<td>The worker's assigned salary basis determines the eligibility</td>
</tr>
<tr>
<td>Individual and workforce compensation plans</td>
<td>Eligibility profiles assigned to the plans and options in plans determine the eligibility for payroll elements</td>
</tr>
</tbody>
</table>

1. In the Elements Overview section, select **Element Eligibility**.
2. On the **Actions** menu, select **Create Element Eligibility**.
3. In the General Information section, **Element Eligibility Name** field, enter the element name with the suffix Open.
   - For example, for the payroll element **Spot Bonus**, the element eligibility name would be **Spot Bonus Open**.
4. Click **Submit**.
5. Click **Done**.

**Related Topics**
- How Element Classification Components Work Together
- Periodicity Conversion
- How Elements Hold Payroll Information for Multiple Features

Options to Determine an Element's Latest Entry Date

An *element's* latest entry date determines how *element entries* process after a person is terminated or transferred to another payroll. The options include: final close, last standard earning date, and last standard process date. These are the predefined options. You can create others that fit your business needs.

**Final Close**

Use this option to let the element stay open for entries beyond a person’s last day worked. For example, you may want the element to stay open to pay a severance package.

**Last Standard Earning Date**

Use this option to stop all element entries on the date the person leaves. You can use this option for recurring entries, such as salary.

**Tip:** If you select the last standard earning date option, also select proration for the element. This ensures that the element is processed up to this date, even if it isn't active at the end of a payroll period.
Last Standard Process Date

The application sets the value for the last standard process date to the last day of the pay period in which the person is termination. However, you can set it to a later period when you terminate the person. The application stops all element entries on the last standard process date or on the date the assignment ends, if it's earlier.

Related Topics

- How Element Setup Affects Entries and Their Values

Element Duration Dates

Element duration dates control when element entries for an employee start or end. View and manage these dates on the Manage Payroll Relationships page when you hire, terminate, add, or transfer an employee's payroll.

In addition to the predefined element duration dates, you may have additional dates that were created as time definitions. Here are the predefined element duration dates:

- First standard earnings date
- Last standard earnings date
- Last standard process date
- Final close date

Element entries end on either the last standard dates or the final close date, depending on the element setup.

Element Duration Dates on the Manage Payroll Relationships Page

You may see multiple sections displaying element duration dates on the Manage Payroll Relationships page. Each section is for a different level of the employment hierarchy: payroll relationship and assignment. In the Assignment section, the first Element Duration Dates section shows the dates associated with the assigned payroll. The second section shows dates associated with the assignment itself. Information in this section overrides information in the section for the assigned payroll.

Date Values

This table provides information about what actions set the date values and which dates they're based on.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Actions Setting Dates</th>
<th>Date Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Standard Earnings Date</td>
<td>Date when standard earnings start accumulating</td>
<td>Hire, add payroll, or transfer payroll</td>
<td>Hire date or the effective date of the change</td>
</tr>
<tr>
<td>Last Standard Earnings Date</td>
<td>Date when standard earnings stop accumulating</td>
<td>End employee assignment or transfer payroll</td>
<td>Termination date. For transfer, last day of the payroll period or one day before transfer date</td>
</tr>
</tbody>
</table>
### Date Field Values

<table>
<thead>
<tr>
<th>Date Field</th>
<th>Set Automatically</th>
<th>Editable</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Standard Earnings Date</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Last Standard Earnings Date</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Last Standard Process Date</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Final Close Date</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>User-defined Time Definition</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Change Date Values

This table shows the dates you can change.

<table>
<thead>
<tr>
<th>Date Field</th>
<th>Description</th>
<th>Actions Setting Dates</th>
<th>Date Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Standard Process Date</td>
<td>Regular payroll process can include elements for normal processing on the last date</td>
<td>End employee assignment or transfer payroll</td>
<td>Last day of the payroll period</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Must be later than or same as LSED or FCD</td>
<td>If you edit this date after termination, then the application doesn't update it with the assignment date</td>
</tr>
<tr>
<td>Final Close Date</td>
<td>Last date a supplemental payroll process can include element entries</td>
<td>None, but you can manually set to limit the length of time that element entries are open for processing, such as the date on which processes skip terminated assignments</td>
<td>End of time, unless manually set</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If date is End of time, date doesn't show in the field</td>
<td>Must be later than or same as LSED</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The End Payroll action doesn't set a final close date</td>
<td>You must set the final close date to end a payroll record</td>
</tr>
</tbody>
</table>

### Related Topics

- How to Set End Dates for Terminations
- How Terminations Affect Payroll Processing
- Use Time Definitions for Severance Pay
Default Values for Element Entries

Specify default values for element entries using the Manage Elements task in the Payroll Calculation work area. Your element setup controls when the default value affects element entries. You can apply the default value only when you create an element entry or at runtime. Another option is to use a formula to provide default values on one or more entry values.

You can do these actions:

• Set a default value for an input value, or select a defaulting formula for the element.
• Override the default value or formula for a specific group of employees that an element eligibility record identifies.
• Override the default value for specific employees on their element entries.

Define Default Values at Element Entry Creation

When you create or edit input values, you can specify a default value. If you don't select the **Apply default at runtime** option, subsequent updates to the default value have no effect on existing element entries. Users can override or change the default value at any time.

Define Default Values at Runtime

To use this method, enter the default value and select the **Apply default at runtime** option for the input value. If the element entry value is left blank, the payroll process uses the current default value from the element or element eligibility record. If you enter a value, the manual entry overrides the default value and updates to the default value don't affect that entry. If you want to restore the default value, clear the entry.

Use a Formula to Provide Default Values

You can create a formula of type element input validation to provide default values for one or more entry values. Select this formula in the Defaulting Formula field for an element or element eligibility record. Here's the order of precedence:

• A formula at the element eligibility level overrides a formula at the element level.
• If you enter a default value for the input value and select a defaulting formula, the formula overrides the default value.

Related Topics

• How Element Setup Affects Entries and Their Values
• Element Input Validation Formula Type

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

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

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

Overview of Using Formulas

Fast formulas are generic expressions of calculations or comparisons that you can reuse with different input variables. This topic summarizes the usage of each formula that corresponds to one or more formula types, which requires specific formula inputs and outputs.

Formulas are translatable. The predefined formulas are alphanumeric and can be in any language. Formula text isn't subject to translation and can handle non-English user-defined elements, input values, or balances. For example, if you define an element name in Chinese, the base element name is stored in Chinese. The database Items are generated using the data in the base tables, so the generated database item contains the Chinese element name, and you can refer to such database items in your formulas.

Note: You can use the Manage Fast Formulas task in the Setup and Maintenance work area of Workforce Deployment, or in work areas relevant to the formula type, such as Payroll Calculation.

Calculate Payrolls

You can write payroll calculations and skip rules for elements to represent earnings and deductions.

You can do these tasks using fast formulas:

- Associate more than one payroll formula with each element to perform different processing for employee assignments with different statuses.
- Define elements and formulas for earnings and deductions with highly complex calculations requiring multiple calls to the database.
- Associate a skip rule formula with an element to define the circumstances in which it's processed.
- Modify the predefined proration formula to control how payroll runs prorate element entries when they encounter an event, such as a mid-period change in an element entry value.

Define Calculations for Benefits Administration

You can use formulas to structure your benefit plans. Formulas provide a flexible alternative to the delivered business rules. Use formulas to configure:

- Date calculations, such as enrollment start and end dates, rate or coverage start and end dates, waiting periods and enrollment periods, or action item due dates
- Calculations of rate and coverage amount, minimum and maximum, or upper and lower limits
- Certification requirements
- Partial month and proration calculations
- Eligibility and participation evaluation

For example, you can write a formula to calculate benefits eligibility for those cases where the provided eligibility criterion doesn't accommodate your particular requirements.

Note: For more information, see Benefits Fast Formula Reference Guide (1456985.1) on My Oracle Support at https://support.oracle.com.
Validate Element Inputs or User-Defined Tables

Use lookups or maximum and minimum values to validate user entries.

For more complex validations you can write a formula to check the entry. You can also use a formula to validate entries in user tables.

Edit the Rules for Populating Work Relationship or Payroll Relationship Groups

You can define criteria to dynamically populate a payroll relationship group or work relationship group.

When you create a payroll relationship group or work relationship group formula type, you can choose to use an expression editor or a text editor. The expression editor makes it easy to build criteria to define the group. For more complex conditions, such as validations, you can select the text editor.

Define Configuration for Compensation

Here’s what you can modify using formulas and add flexibility to existing compensation plan configuration:

- Start and end dates for compensation allocations under individual compensation plans
- Person selection, hierarchy determination, column default values, and currency selection for workforce compensation plans
- The source of items displayed in total compensation statements

Define Formulas to Create Rule Templates for Time and Labor

Use formulas with time repository rule templates to create rules. The formulas contain delivered combinations of rule parameters and output results. You can use one formula with multiple rule templates by varying the template configuration.

When creating a rule template, you select a formula name, and then configure the parameter type and display name of the parameters and variables. You don’t have to redo the entire formula statement to determine what details to change to achieve a particular outcome.

Here’s what you can use formulas to apply in Time and Labor:

- Logic for processing or calculating time
- Parameters that enable rules to pass values to the formula for use in calculations
- Output variables that the formula uses to return calculation results to the rules

For example, the Period Maximum Hours Template uses the WFM_PERIOD_MAXIMUM_TIME_ENTRY_RULE formula to compare reported time category hours to defined maximum hours.

Formula Type for Compensation Currency Selection

The Compensation Currency Selection formula determines the currency associated with a workforce compensation component. You select the formula on the Configure Compensation Components page.

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.

<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_ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Assignment 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_COMPONENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Component ID</td>
</tr>
</tbody>
</table>
### 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_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_EXTRACTION_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Extraction 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_EFFECTIVE_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Performance Effective Date</td>
</tr>
<tr>
<td>CMP_IV_PROMOTION_EFFECTIVE_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_CURR_CODE</td>
<td>Char</td>
<td>N</td>
<td>Currency code from the formula</td>
</tr>
</tbody>
</table>

### Sample Formula

This sample formula determines the currency for a plan based on the component ID.

```c
/*----------------------------------------------------------------------
FORMULA NAME : Compensation Currency Selection Formula
FORMULA TYPE : Compensation Currency Selection
DESCRIPTION: It returns the currency code based on component_id.
----------------------------------------------------------------------*/

/****** INPUT VALUES DEFAULTS BEGIN ******
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number)
*/
```
Formula Type for Compensation Default and Override

The Compensation Default and Override formula determines the default values populated in a column for a workforce compensation plan. When you configure the worksheet display for a column in the Configure Column Properties page, Default Values section, you can select this formula.

The following predefined formulas are available for the eligible salary column for this formula type.

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE</td>
<td>Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_MONTH_END_AVERAGE</td>
<td>Eligible salary calculated by averaging salary on the last day of each month in the workforce compensation cycle evaluation period. Uses salary on the last day of the evaluation period for midmonth evaluation end dates.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_NINETY_DAY_MIN</td>
<td>Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period. Returns zero for workers who worked fewer than 90 days.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_USING_FTE</td>
<td>Eligible salary calculated by averaging daily salary adjusted for part-time workers. Accounts for number days that a salary is in effect and FTE during the workforce compensation cycle evaluation period.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_FOR_JOBS</td>
<td>Eligible salary calculated by averaging salary for the number of days a worker holds a specific job code on the assignment. Accounts for the number of days that a salary is in effect during the workforce compensation cycle evaluation period.</td>
</tr>
</tbody>
</table>

Caution: Use these formulas as samples for testing purposes only. Copy and create your own version of a formula for use in your own compensation plans. Modifying the sample formula might provide unexpected results upon upgrade.
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.

<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>Unique numeric identifier for the workforce compensation plan</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_ID</td>
<td>Number</td>
<td>Y</td>
<td>Unique numeric identifier for the fiscal calendar period</td>
</tr>
<tr>
<td>CMP_IV_COMPONENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Unique numeric identifier for the workforce compensation plan component</td>
</tr>
<tr>
<td>CMP_IV_ITEM_NAME</td>
<td>Char</td>
<td>Y</td>
<td>Name for the workforce compensation plan item</td>
</tr>
<tr>
<td>CMP_IV_PERSON_ID</td>
<td>Number</td>
<td>Y</td>
<td>Unique numeric identifier for the worker associated with the workforce compensation plan</td>
</tr>
<tr>
<td>Input Value</td>
<td>Data Type</td>
<td>Required</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------</td>
<td>----------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CMP_IV_PLAN_START_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the workforce compensation plan becomes active</td>
</tr>
<tr>
<td>CMP_IV_PLAN_END_DATE</td>
<td>Date</td>
<td></td>
<td>Date on which the workforce compensation plan becomes inactive</td>
</tr>
<tr>
<td>CMP_IV_PLAN_ELIG_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the workforce compensation plan becomes eligible</td>
</tr>
<tr>
<td>CMP_IV_PERFORMANCE_EFF_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date to use for compensation performance ratings</td>
</tr>
<tr>
<td>CMP_IV_PROMOTION_EFF_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which job, grade, and position changes take effect</td>
</tr>
<tr>
<td>CMP_IV_XCHG_RATE_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the application obtains conversion rates from the GL daily rates table</td>
</tr>
<tr>
<td>CMP_IV_ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Date to use for assignments</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_DEFAULT_VALUE</td>
<td>Number/ Char/Date</td>
<td>Y</td>
<td>Default value from the formula. The date should be in yyyy/mm/dd format</td>
</tr>
<tr>
<td>L_DATA_TYPE</td>
<td>Char</td>
<td>Y</td>
<td>Data type of the column</td>
</tr>
</tbody>
</table>

**Sample Formula**

This sample formula determines the value of a column based on its item name.

```sql
/*************************************************************************/
FORMULA NAME : Compensation Default and Override Formula
FORMULA TYPE : Compensation Default and Override
DESCRIPTION : Defaults the value of a column based on its item_name
```
Formula Type for Compensation Hierarchy Determination

The Compensation Hierarchy Determination formula determines the hierarchy for an associated workforce compensation plan. You select the formula on the Configure Hierarchies page.

Contexts

The following contexts are available to formulas of this type:

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

<table>
<thead>
<tr>
<th>Input Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_ IV_ ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Assignment ID</td>
</tr>
<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_COMPONENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Component ID</td>
</tr>
<tr>
<td>CMP_ IV_PERSON_ID</td>
<td>Number</td>
<td>Y</td>
<td>Worker 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_EXTRACTION_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Extraction 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>
</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_PERSON_ID</td>
<td>Number</td>
<td>Y</td>
<td>Person ID of manager</td>
</tr>
<tr>
<td>L_ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Assignment ID of manager</td>
</tr>
</tbody>
</table>

Or

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>L_PERSON_NUMBER</td>
<td>Number</td>
<td>Y</td>
<td>Person number of manager</td>
</tr>
</tbody>
</table>

You receive the following error if the formula returns an invalid PERSON_NUMBER and the application can't obtain the ASSIGNMENT_ID:

Formula passed in an invalid person number <15465857>. Assignment ID could not be obtained.

**Sample Formula**

This sample formula determines the manager of a person when the assignment_id is passed.

```sql
/*------------------------------*/
FORMULA NAME : Compensation Hierarchy Determination Formula
FORMULA TYPE : Compensation Hierarchy Determination
DESCRIPTION: Hierarchy determination fast formula which is based on assignment_id
------------------------------*/
/*----------------- INPUT VALUES DEFAULTS BEGIN ------------------------*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number)/
----------------- INPUT VALUES DEFAULTS ENDS-------------------------------*/
/*---------------- FORMULA SECTION BEGIN -------------------------------*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
L_PERSON_ID = '0' L_ASSIGNMENT_ID = '0'
if (CMP_IV_ASSIGNMENT_ID = 100000008154060 ) THEN
  ( L_PERSON_ID = to_char(-999) //-999 indicates top level
  //Manager.
  L_ASSIGNMENT_ID = to_char(-999)
)
ELSE
  ( L_PERSON_ID = to_char(100000008153756)
    L_ASSIGNMENT_ID = to_char(100000008154060)
  )
RETURN L_PERSON_ID , L_ASSIGNMENT_ID
/*---------------- FORMULA SECTION END -------------------------------*/
```
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.

<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>
</tbody>
</table>
Input Value | Data Type | Required | Description
--- | --- | --- | ---
CMP_IV_PLAN_ELIG_DATE | Date | Y | Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_DATE | Date | Y | Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE | Date | Y | Promotion Effective Date
CMP_IV_XCHG_RATE_DATE | Date | Y | Currency Conversion Date
CMP_IV_ASSIGNMENT_ID | Number | Y | Assignment ID
CMP_IV_PERSON_ID | Number | Y | Worker ID

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.

```
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)

DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
l_selected = 'Y'
if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
  l_selected = 'N'
else
  l_selected = 'Y'
```


Formula Type for Compensation Default Access Level

The Compensation Default Access Level formula determines the access level for the selected workforce compensation plan hierarchy. You select the formula on the Configure Hierarchies page.

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.

<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_EXTRACTION_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Extraction Date</td>
</tr>
</tbody>
</table>
## Fast Formulas

### Input Value

<table>
<thead>
<tr>
<th>Input Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_IV_HIERARCHY_TYPE</td>
<td>Char</td>
<td>Y</td>
<td>Hierarchy Type</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>UPDATABLE</td>
<td>Char</td>
<td>Y</td>
<td>Updatable</td>
</tr>
<tr>
<td>READONLY</td>
<td>Char</td>
<td>Y</td>
<td>Read-only</td>
</tr>
<tr>
<td>NOACCESS</td>
<td>Char</td>
<td>Y</td>
<td>No Access</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.

``` java
/*-----------------------------------------------
 FORMULA NAME : Compensation Default Access Level
-----------------------------------------------*/
```
FORMULA TYPE : Compensation Default Access Level
DESCRIPTION : Assignment_id based selection fast formula
***************************************************************************/
/*========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)
/*========== INPUT VALUES DEFAULTS ENDS======================*/
/*================ FORMULA SECTION BEGIN =======================*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
l_selected = 'Y'
/* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/
if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
  { l_selected = 'NOACCESS' }
else
  { l_selected = 'UPDATABLE' }
RETURN l_selected
/*================ FORMULA SECTION END =======================*/

Related Topics
• How You Test and Troubleshoot the Default and Override Formula

Formula Type for Total Compensation Item

The Total Compensation Item formula determines compensation information that isn't stored in the other predefined item source types. You select the formula when you manage compensation items on the Create or Edit Compensation Items page.

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 formula of this type.

<table>
<thead>
<tr>
<th>Input Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_IV_PERIOD_ID</td>
<td>Char</td>
<td>Y</td>
<td>Period ID</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_START_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Statement Period Start Date</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_END_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Statement Period End Date</td>
</tr>
</tbody>
</table>

### Return Values

The following return variables are available to formula 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>COMPENSATION_DATES</td>
<td>Date</td>
<td>Y</td>
<td>One to 15 transaction dates delimited by semicolon, maximum 250 characters.</td>
</tr>
<tr>
<td>VALUES</td>
<td>Char</td>
<td>Y</td>
<td>One to 15 transaction values delimited by semicolon, maximum 250 characters. Must be the same number of values as dates.</td>
</tr>
<tr>
<td>ASSIGNMENTS</td>
<td>Char</td>
<td>N</td>
<td>One to 15 transaction assignments delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).</td>
</tr>
<tr>
<td>LEGALEMPLOYERS</td>
<td>Char</td>
<td>N</td>
<td>One to 15 legal employer IDs delimited by semicolon, maximum 250 characters. Must be the same number of</td>
</tr>
<tr>
<td>Return Value</td>
<td>Data Type</td>
<td>Required</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------</td>
<td>----------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>assignments as dates. Can return an empty space with a delimiter (; ;).</td>
</tr>
<tr>
<td>COMPENSATION_DATES1</td>
<td>Date</td>
<td>Y</td>
<td>Second variable for transaction dates from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>VALUES1</td>
<td>Char</td>
<td>Y</td>
<td>Second variable for transaction values from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>ASSIGNMENTS1</td>
<td>Char</td>
<td>N</td>
<td>Second variable for transaction assignments from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>LEGALEMPLOYERS1</td>
<td>Char</td>
<td>N</td>
<td>Second variable for legal employer IDs from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>COMPENSATION_DATES2</td>
<td>Date</td>
<td>Y</td>
<td>Transaction dates from 31 to 45.</td>
</tr>
<tr>
<td>VALUES2</td>
<td>Char</td>
<td>Y</td>
<td>Transaction values from 31 to 45.</td>
</tr>
<tr>
<td>ASSIGNMENTS2</td>
<td>Char</td>
<td>N</td>
<td>Transaction assignments from 31 to 45.</td>
</tr>
<tr>
<td>LEGALEMPLOYERS2</td>
<td>Char</td>
<td>N</td>
<td>Legal employers from 31 to 45.</td>
</tr>
<tr>
<td>COMPENSATION_DATES3</td>
<td>Dates</td>
<td>Y</td>
<td>Transaction dates from 46 to 60.</td>
</tr>
<tr>
<td>VALUES3</td>
<td>Char</td>
<td>Y</td>
<td>Transaction values from 46 to 60.</td>
</tr>
<tr>
<td>ASSIGNMENTS3</td>
<td>Char</td>
<td>N</td>
<td>Transaction assignments from 46 to 60.</td>
</tr>
<tr>
<td>LEGALEMPLOYERS3</td>
<td>Char</td>
<td>N</td>
<td>Legal employers from 46 to 60.</td>
</tr>
</tbody>
</table>
Sample Formula

This sample formula returns one date and one value based on the worker ID.

```java
/*FORMULA NAME : Total Compensation Simple Item Formula*/
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns one date and one value.

/*========== INPUT VALUES DEFAULTS BEGIN=========================*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date), CMP_IV_PERIOD_END_DATE (date)
DEFAULT FOR CMP_IV_PERSON_ID IS '-1'
DEFAULT FOR CMP_IV_PERIOD_START_DATE IS '4712/12/31' (date)
DEFAULT FOR CMP_IV_PERIOD_END_DATE IS '4712/12/31' (date)
/*========== INPUT VALUES DEFAULTS END==========================*/

/*FORMULA SECTION BEGIN========================================*/
COMPENSATION_DATES = '2005/01/01'
VALUES = '500.00'
ASSIGNMENTS = to_char(get_context(HR_ASSIGNMENT_ID,-1))
RETURN COMPENSATION_DATES, VALUES, ASSIGNMENTS
/*FORMULA SECTION END==========================================*/
```

This sample formula returns multiple variables.

```java
/*FORMULA NAME : Total Compensation Multi Item Formula*/
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns multiple variables.

/*========== INPUT VALUES DEFAULTS BEGIN=========================*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date), CMP_IV_PERIOD_END_DATE (date)
/*========== INPUT VALUES DEFAULTS END==========================*/

/*FORMULA SECTION BEGIN========================================*/
COMPENSATION_DATES = '2009/01/01;2009/02/01;2009/03/01'
COMPENSATION_DATES1 = '2009/07/01;2009/08/01;2009/09/01'
COMPENSATION_DATES2 = '2009/10/01;2009/11/01;2009/12/01'
COMPENSATION_DATES3 = '2009/10/01;2009/11/01;2009/12/01'
VALUES = '200.00;200.00;300.00'
VALUES1 = '300.00;500.00;500.00'
VALUES2 = '500.00;500.00;600.00'
VALUES3 = '600.00;600.00;700.00'
ASSIGNMENTS = ';1234567890;1234567890'
ASSIGNMENTS1 = '1234567890;1234567890;1234567890'
ASSIGNMENTS2 = ';1234567890;1234567890'
ASSIGNMENTS3 = '1234567890;;1234567890'
/* RETURNS LAST TWO ASSIGNMENTS */
LEGALEMPLOYERS = '0123456789;0123456789'
LEGALEMPLOYERS1 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS2 = '0123456789;0123456789;0123456789;0123456789'
LEGALEMPLOYERS3 = '0123456789;0123456789'
/*FORMULA SECTION END==========================================*/
```
Example of Writing a Fast Formula Using Formula Text

In this example, you use the text editor to create a fast formula that returns two different ranges of scheduled hours: one range for managers, another range for other workers.

Here are the key decisions when deciding on which formula to create:

<table>
<thead>
<tr>
<th>Key Decisions</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the formula for a specific legislative data group?</td>
<td>No, this is a global formula that can be used by any legislative data group.</td>
</tr>
<tr>
<td>What is the formula type for this formula?</td>
<td>Range of Scheduled Hours</td>
</tr>
<tr>
<td>Are there any contexts used in this formula?</td>
<td>No</td>
</tr>
<tr>
<td>Are there any database item defaults?</td>
<td>Yes, ASG_JOB</td>
</tr>
<tr>
<td>Are there any input value defaults?</td>
<td>No</td>
</tr>
<tr>
<td>What are the return values?</td>
<td>MIN_HOURS, MAX_HOURS, FREQUENCY</td>
</tr>
</tbody>
</table>

Creating a Fast Formula Using the Text Editor to Determine a Manager's Scheduled Hours

1. In the Setup and Maintenance work area, select these options:
   - Offering: Workforce Deployment
   - Functional Area: Payroll
   - Task: Manage Fast Formulas
2. Click **Go to Task**.
3. On the Manage Fast Formula page, click the **Create** icon.
4. On the Create Fast Formula page, complete these fields:
<table>
<thead>
<tr>
<th>Fields for the Fast Formula</th>
<th>Values for the Fast Formula</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formula Name</td>
<td>Manager Range of Scheduled Hours</td>
</tr>
<tr>
<td>Formula Type</td>
<td>Range of Scheduled Hours</td>
</tr>
<tr>
<td>Description</td>
<td>Manager's Range of Hours</td>
</tr>
<tr>
<td>Effective Start Date</td>
<td>1-Jan-2010</td>
</tr>
</tbody>
</table>

5. Click **Continue**.
6. Enter these formula details in the Formula Text section:

```sql
/* DATABASE ITEM DEFAULTS BEGIN */
DEFAULT FOR asg_job IS ' '  
/* DATABASE ITEM DEFAULTS END */

JOB_1 = ASG_JOB
IF JOB_1 = 'Manager' then
(MIN_HOURS = 25
MAX_HOURS = 40
FREQUENCY = 'H')
else
(MIN_HOURS = 20
MAX_HOURS = 35
FREQUENCY = 'H')
return MIN_HOURS, MAX_HOURS, FREQUENCY
```

7. Click **Compile**.
8. Click **Save**.

**Formula Compilation Errors**

Compilation errors are displayed in the Manage Fast Formulas page after you compile the formula. The compiler stops the compilation process when it encounters an error. Error messages display the line number and the type of error.

**Common Compilation Errors**

Here's some of the common formula compilation errors.

<table>
<thead>
<tr>
<th>Formula Compilation Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Syntax Error</td>
<td>The formula text violates the grammatical rules for the formula language. For example, if you use IF1 instead of IF in an IF statement.</td>
</tr>
<tr>
<td>Incorrect Statement Order</td>
<td>ALIAS, DEFAULT, or INPUT statements come after other statements.</td>
</tr>
</tbody>
</table>
## Formula Compilation Error

<table>
<thead>
<tr>
<th>Error Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misuse of ASSIGNMENT Statement</td>
<td>Occurs when any of these conditions exist:</td>
</tr>
<tr>
<td></td>
<td>- An ASSIGNMENT assigns a value to a database item.</td>
</tr>
<tr>
<td></td>
<td>- A context is assigned a value externally to a CHANGE_CONTEXTS statement.</td>
</tr>
<tr>
<td></td>
<td>- The formula assigns a value to a non-context variable within a CHANGE_CONTEXTS statement.</td>
</tr>
<tr>
<td></td>
<td>You can use CHANGE_CONTEXTS statements in a formula.</td>
</tr>
<tr>
<td>Misuse of ALIAS Statement</td>
<td>You can use an ALIAS statement only for a database item.</td>
</tr>
<tr>
<td>Missing DEFAULT Statement</td>
<td>A database item that specifies a default value must have a DEFAULT statement.</td>
</tr>
<tr>
<td>Misuse of DEFAULT Statement</td>
<td>You specify a DEFAULT statement for a variable other than as an input or a database item.</td>
</tr>
<tr>
<td>Uninitialized Variable</td>
<td>The compiler detects that a variable is uninitialized when used. The compiler can't do this in all cases. This error often occurs when the formula includes a database item that requires contexts that the formula type doesn't support. The formula treats the database item as a local variable. For example, balance database items require the PAYROLL_REL_ACTION_ID, PAYROLL_ASSIGNMENT_ID and CALC_BREAKDOWN_ID contexts. Typically, you use these statements in formulas of type Oracle Payroll.</td>
</tr>
<tr>
<td>Missing Function Call</td>
<td>The compiler doesn't recognize a function call. The combination of return type, function name, and parameter types doesn’t match any available function.</td>
</tr>
<tr>
<td>Incorrect Operator Usage</td>
<td>An instance of a formula operator use doesn't match the permitted uses of that operator. For example, the + operator has two permitted uses. The operands are both of data type NUMBER, or both of data type TEXT.</td>
</tr>
<tr>
<td>Inconsistent Data Type Usage</td>
<td>The formula uses a formula variable of more than one data type. Or the formula uses a database item or context with the wrong data type. For example, Variable A is assigned a NUMBER value at the start of the formula, but is assigned a TEXT value later in the formula.</td>
</tr>
<tr>
<td>EXIT Statement Not Within WHILE Loop</td>
<td>A condition that eventually becomes false or an EXIT call for exiting the loop doesn't exist.</td>
</tr>
<tr>
<td>Misuse of Context</td>
<td>The formula uses a variable as a context, or a context as a variable. For example, a formula assigns a value to AREA1 as an ordinary variable, but later uses AREA1 as a context in a GET_CONTEXT call.</td>
</tr>
</tbody>
</table>
## Formula Execution Errors

_Fast formula_ execution errors occur when a problem arises while a formula is running. Typically, data-related issues cause these errors either in the formula or in the application database.

### Formula Execution Errors

Here’s some of the formula execution errors.

<table>
<thead>
<tr>
<th>Formula Execution Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uninitialized Variable</td>
<td>When the formula compiler can’t fully determine if a variable or context is initialized, it generates a code to test if the variable is initialized. When the formula runs, the code displays an error if the variable or context isn’t initialized.</td>
</tr>
<tr>
<td>Divide by Zero</td>
<td>Raised when a numeric value is divided by zero.</td>
</tr>
<tr>
<td>No Data Found</td>
<td>Raised when a non-array type database item unexpectedly fails to return any data. If the database item can’t return data, then it should provide a default value. You can specify a default value using a DEFAULT statement. An error in formula function code can also cause this error message.</td>
</tr>
<tr>
<td>Too Many Rows</td>
<td>Raised when a non-array type database item unexpectedly returns more than a single row of data. The cause is an incorrect assumption made about how the data is being accessed. An error in the formula function code can also cause this error message.</td>
</tr>
<tr>
<td>NULL Data Found</td>
<td>Raised when a database item unexpectedly returns a NULL data value. If the database item can return a NULL value, then it provides a default value.</td>
</tr>
<tr>
<td>Value Exceeded Allowable Range</td>
<td>Raised for a number of reasons, such as exceeding the maximum allowable length of a string.</td>
</tr>
<tr>
<td>Invalid Number</td>
<td>Raised when a formula attempts to convert a nonnumeric string to a number.</td>
</tr>
<tr>
<td>User Defined Function Error</td>
<td>Raised from within a formula function. The error message text is provided as part of the formula error message.</td>
</tr>
<tr>
<td>External Function Call Error</td>
<td>A formula function returns an error, but doesn’t provide any additional information to the formula code. The function may have sent error information to the logging destination for the executing code.</td>
</tr>
</tbody>
</table>

**Note:** Some database items can’t return a NULL value. If the database items can return a NULL value, then you can provide a default value for that database item.
<table>
<thead>
<tr>
<th>Formula Execution Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function Returned NULL Value</td>
<td>A formula function returns a NULL value.</td>
</tr>
<tr>
<td>Too Many Iterations</td>
<td>A single WHILE loop, or a combination of WHILE loops has exceeded the maximum number of permitted iterations. This error is raised to terminate loops that can never end, which indicates a programming error within the formula.</td>
</tr>
<tr>
<td>Array Data Value Not Set</td>
<td>The formula tries to access an array index that has no data value. This error occurs in the formula code.</td>
</tr>
<tr>
<td>Invalid Type Parameter for WSA_EXISTS</td>
<td>You specify an invalid data type in the WSA_EXISTS call.</td>
</tr>
<tr>
<td>Incorrect Data Type For Stored Item</td>
<td>When retrieving an item using WSA_GET, the actual data type doesn't match that of the stored item. This error occurs within the calling formula.</td>
</tr>
<tr>
<td>Called Formula Not Found</td>
<td>The called formula isn't found when attempting to call a formula from a formula. This error may occur due to an issue in the calling formula, or because of installation issues.</td>
</tr>
<tr>
<td>Recursive Formula Call</td>
<td>An attempt was made to call a formula from itself. The call could be made directly or indirectly from another called formula. Calling a formula in a recursive manner isn't permitted.</td>
</tr>
<tr>
<td>Input Data Has Different Types in Called and Calling Formulas</td>
<td>When calling a formula from a formula, the input data type within the called formula doesn't match the data type specified in the calling formula.</td>
</tr>
<tr>
<td>Output Has Different Types in Called and Calling Formulas</td>
<td>When calling a formula from a formula, the output data type within the called formula doesn't match the data type specified in the calling formula.</td>
</tr>
<tr>
<td>Too Many Formula Calls</td>
<td>When a formula calls another formula in its text, resulting in a hierarchy. The maximum depth of the hierarchy is 10.</td>
</tr>
</tbody>
</table>

**FAQs**

**When do I run the Compile Formula process?**

When you create or update multiple fast formulas simultaneously, run the Compile Formula process on the Submit a Process or Report page from the Payroll Administration work area.
What's the difference between a formula compilation error and an execution error?

Compilation errors occur on the Manage Fast Formulas page when you compile the formula. An error message explains the nature of the error. Common compilation errors are syntax errors resulting from typing mistakes. You can view error messages on the dashboard or go to the messages tab directly after the process is run.

Execution errors occur when a problem arises while a formula is running. Typically, data-related issues either in the formula or in the application database cause these errors.
6 Approvals

Salary and Compensation Approval Tasks

The Compensation Management business process includes standard approval workflow tasks which are used in various business processes. You can change these approval workflow tasks to meet your business process requirements.

<table>
<thead>
<tr>
<th>Approval Workflow Task</th>
<th>Business Process Task Where Used</th>
<th>Applies to Approval Of</th>
</tr>
</thead>
<tbody>
<tr>
<td>ChangeSalaryApprovalFYITask</td>
<td>Manage Base Pay</td>
<td>Worker salary changes, applying any relevant salary range differentials to compa-ratios</td>
</tr>
<tr>
<td>ChangeSalaryApprovalTask</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ChngEligFYI</td>
<td>Manage Workforce Compensation</td>
<td>Worker eligibility changes</td>
</tr>
<tr>
<td>ChngEligTask</td>
<td></td>
<td>Worker reassignment on the worksheet</td>
</tr>
<tr>
<td>RsgnWorkerFYI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RsgnWorkerTask</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VariableAllocationFYITask</td>
<td>Manage Individual Compensation</td>
<td>Individual allocations, such as bonuses and allowances</td>
</tr>
<tr>
<td>VariableAllocationTask</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You view and edit the approval workflow tasks using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. This task is part of the Define Approval Management for Human Capital Management task list.

For each approval workflow task, you can configure the rules and task.

- Use the Rules tab to define data-driven configuration rules that determine routing.
- Use the Task tab to define event-driven configuration, such as assignment and routing policies, expiration and escalation policies, and notification settings.

The following Rules and Tasks sections contain information about the standard configurations and settings for the delivered approval workflow tasks.

Rules

None of the FYI approval workflow tasks have rules. The non-FYI workflow tasks are configured so that if the rule applies, then notification routing uses the Supervisory list builder and requires a response.

The rules for these tasks use a single level of the supervisory hierarchy:

- ChngEligTask
- RsgnWorkerTask
The rules for these tasks use two levels of the supervisory hierarchy:

- ChangeSalaryApprovalTask
- VariableAllocationTask

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

\[
\text{Task}.\text{payload}.\text{getSalaryApprovalValuesResponse}.\text{result/value}.\text{newChangePercent more than 10.00}.
\]

### Task

The following table shows the default assignment and routing policies vary between FYI and non-FYI tasks.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Configuration</th>
<th>Routing Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>FYI Tasks</td>
<td>Enable auto claim selected.</td>
<td>Used when the task is sent to a group of people. The first person who acts on</td>
</tr>
<tr>
<td></td>
<td></td>
<td>the task, rather than just reviewing it, automatically becomes the task owner.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Without auto claim, the person claiming the task must click Claim before he or</td>
</tr>
<tr>
<td></td>
<td></td>
<td>she can work on the task.</td>
</tr>
<tr>
<td>Non-FYI Tasks</td>
<td>Each task completes when the participant selects Reject.</td>
<td>With this configuration, if the first-level manager rejects the task, the task</td>
</tr>
<tr>
<td></td>
<td></td>
<td>completes and does not proceed to the next level manager for approval. This setting also ensures that the task does not complete when the first-level manager approves it. Rather, the task continues to the next, final level for approval.</td>
</tr>
</tbody>
</table>

The expiration and escalation policy for all tasks is set to **Never Expires**.

Notification settings identify what business process task status causes a notification to be sent, as well as the notification recipient. The following table identifies the settings for the Compensation Management approval workflow tasks.

<table>
<thead>
<tr>
<th>Approval Workflow Task</th>
<th>Business Process Task Status</th>
<th>Notification Recipient</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Assigned</td>
<td>Assignees</td>
</tr>
<tr>
<td>All</td>
<td>Complete</td>
<td>Task initiator</td>
</tr>
<tr>
<td>ChangeSalaryApprovalFYITask</td>
<td>Error</td>
<td>Task owner</td>
</tr>
<tr>
<td>ChangeSalaryApprovalTask</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ChngEligTask</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Oracle Human Capital Management Cloud
Implementing Workforce Compensation

Chapter 6
Approvals

<table>
<thead>
<tr>
<th>Approval Workflow Task</th>
<th>Business Process Task Status</th>
<th>Notification Recipient</th>
</tr>
</thead>
<tbody>
<tr>
<td>RsgnWorkerTask</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VariableAllocationFYITask</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VariableAllocationTask</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All non-FYI workflow tasks are also set to:

- Make notifications actionable
- Send task attachments with email notifications

How You Define Approvals for Human Capital Management

You can manage approval policies using the tasks Manage Approval Transactions for Human Capital Management and Manage Task Configurations for Human Capital Management.

Managing Approval Transactions

Using the Manage Approval Transactions page, you can configure approval policies for many HCM tasks, including, but not limited to, the following:

- Hire
- Promote
- Transfer
- Terminate

You can select approvers for a task, arrange approvers in the required sequence, define approval rules for each approver, and configure conditions for each rule.

Managing Task Configurations

The Manage Task Configurations for Human Capital Management task navigates to the BPM Worklist. You can use the BPM Worklist to review and configure approval policies for HCM tasks; however, we recommend that you use the Manage Approval Transactions for Human Capital Management task. Using either UI, you can configure the following approval details:

- When to issue approval notifications
- Who can access task contents
- What actions are available to approvers
- What to do when errors occur during approval routing
- When tasks expire or when should tasks be escalated
- When approvers can add additional approvers
Note: The HCM Simplified UI does not allow you to modify rules that were created using Advanced Mode in the BPM Worklist. If you originally created your rule conditions using Advanced Mode in the BPM Worklist, you must continue to use the BPM Worklist to make changes.

Approval Flow

Approval Management configuration options for Oracle Fusion Human Capital Management determine most of the actions that are available to the participants in the approval process. For example:

- Either approver can reject the transaction. By default, the approval process stops when the transaction is rejected.
- The second-level manager can push the transaction back to the first-level manager, who then has a second opportunity to review the transaction and either approve or reject it, as appropriate.
- Insertion of approvers in the approval list is permitted.
- Approvers can delegate their approval responsibilities to other approvers.

If you change the default settings of the Approval Management configuration options for a task, then different actions or action outcomes become available to this approval flow.

How You Manage HCM Approval Transactions

Use the Transaction Console to easily monitor daily tasks related to HCM approvals. In the Navigator menu, select Tools then Transaction Console.

The Transaction Console provides diagnostic information and search capabilities that enable HCM Administrators to:

- See the current status of all of the approval tasks in the application.
- Monitor tasks that have failed, and take appropriate actions like withdraw or reassign to resolve stuck transactions.
- Search approval tasks based on user defined criteria.
- Save search criteria.
- Export the queried results to a spreadsheet.
- Set up approval rules and routing policies.
- Set up transaction flows to bypass approvals.

Approval Rules Tab

To view or configure the approval rules for a transaction, search for the transaction and click the Configure button in the Rules column in the search results. This opens the Rules configuration page where you can edit and save approval rules.

Transaction Summary Tab

You can monitor all of the tasks in the application and can search and filter the results based on various criteria. The Transaction Summary tab provides information on whether a process has failed or is pending, and how many instances of the process have failed or are pending. An approval process may fail due to various reasons, for example, if there is a network or database outage or an issue in the approval rules setup. An approval process may also remain in a pending state waiting for approval. For failed processes, you can view the error message generated in the application, and for pending processes, you can view the list of approvers. You can also view the current status of the approval which
shows who the transaction is with or who might have already approved it. You can either withdraw a failed process or configure the approval rules and resubmit the process. If you withdraw the process, then the process is canceled and you can either start or submit a new transaction.

**Bypassing Approvals**

The application automatically initiates the approval process upon submitting a transaction, if the transaction has approvals configured. You can override this behavior by enabling the Bypass Approvals option for the transaction. If you bypass approval for a transaction, the transaction is committed immediately upon submit and is not routed for approval.

<table>
<thead>
<tr>
<th>Note:</th>
</tr>
</thead>
</table>

When you submit a termination transaction, you can select the Deferred processing option to postpone processing the transaction until the termination date. This option is typically used in future-dated terminations. However, if you enable Bypass Approvals for the termination transaction, the Deferred processing option will not be available for selection.

For more information, see Oracle HCM Cloud Common Features Release 13 Transaction Console (2430452.1) on My Oracle Support at https://support.oracle.com.

**The Manager Hierarchy: How It's Maintained**

In many situations, a person's manager hierarchy must be readily available. For example, a person's line manager may be required during an approval process, and business intelligence reports often retrieve data based on a manager hierarchy. This topic describes how the manager hierarchy is maintained.

**How the Manager Hierarchy Is Maintained**

A person's manager hierarchy could be derived from active data tables, but the impact of that approach on performance is unpredictable. Therefore, the complete manager hierarchy for each person is extracted from data tables and stored in a separate manager hierarchy table. This table is known as the denormalized manager hierarchy. The denormalized manager hierarchy ensures that a person's manager hierarchy is both easily accessible and up to date.

**Running the Refresh Manager Hierarchy Process**

Whenever a change is made to a person's manager hierarchy through the application pages, the change is reflected automatically in the denormalized manager hierarchy table. You use the Refresh Manager Hierarchy process to populate the denormalized manager hierarchy table when person records are migrated from other applications.

You run the Refresh Manager Hierarchy process in the Scheduled Processes work area. To run the process, you must have the Human Resource Specialist job role. The process has no default schedule. You can run the process occasionally to perform a complete refresh of the denormalized manager hierarchy. Alternatively, you can specify a schedule to run the process at regular intervals. Refresh Manager Hierarchy processes all types of manager hierarchies.
In addition to performing full refreshes of the manager hierarchy, you can perform incremental refreshes. With this approach, you refresh the hierarchy based on manager changes occurring in the previous N days. Schedule a full refresh every month or quarter and an incremental refresh every day or week, for example.

Approval Management Configuration Options for Oracle Fusion Human Capital Management

Approval Management has the following default configuration options for all applications in the Oracle Fusion Human Capital Management family.

<table>
<thead>
<tr>
<th>Configuration Option</th>
<th>Default Value</th>
<th>Effect of Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad hoc insertion of approvers</td>
<td>True</td>
<td>Ad hoc insertion of approvers in the approval list is allowed. Users who add approvers may also modify or remove the approvers that they add.</td>
</tr>
<tr>
<td>Allow delegate</td>
<td>True</td>
<td>Approvers can delegate their approval responsibilities to other users. One approver replaces another, but the approver list is otherwise unaltered.</td>
</tr>
<tr>
<td>Allow push back</td>
<td>True</td>
<td>An approver can push the transaction back to the previous approver, who thereby has a second opportunity to review the transaction.</td>
</tr>
<tr>
<td>Allow reassign</td>
<td>True</td>
<td>Any approver can reassign the approval to a different approver. The approval list is recalculated based on the new approver.</td>
</tr>
<tr>
<td>Allow request information</td>
<td>True</td>
<td>Approvers can request more information from another approver or the person who submitted the transaction.</td>
</tr>
<tr>
<td>Allow self-approval</td>
<td>False</td>
<td>The person who submits the transaction can’t approve it.</td>
</tr>
<tr>
<td>Allow withdraw</td>
<td>True</td>
<td>The requester or an administrator can withdraw a transaction while the approval process is incomplete. Approvers who have already approved are notified of the withdrawal. The transaction is removed from the worklists of approvers who haven’t yet approved.</td>
</tr>
<tr>
<td>Configuration Option</td>
<td>Default Value</td>
<td>Effect of Default Value</td>
</tr>
<tr>
<td>------------------------------</td>
<td>----------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>On error notify</td>
<td>Human Resources Application Administrator</td>
<td>A Human Resources Application Administrator is notified automatically when an error occurs.</td>
</tr>
<tr>
<td>Period before task expires</td>
<td>None</td>
<td>Approval tasks don’t expire.</td>
</tr>
<tr>
<td>Period before task escalates</td>
<td>None</td>
<td>Approval tasks aren’t escalated to other approvers.</td>
</tr>
<tr>
<td>Escalated approver</td>
<td>None</td>
<td>Approval tasks aren’t escalated to other approvers.</td>
</tr>
<tr>
<td>Repeated approver frequency</td>
<td>Once per approval</td>
<td>An approver receives one notification per transaction, even when the approver appears multiple times in the approver list.</td>
</tr>
<tr>
<td>Re-evaluate approver list</td>
<td>True</td>
<td>The approver list is regenerated after every response.</td>
</tr>
<tr>
<td>Rejection outcome</td>
<td>Stop all</td>
<td>When an approver rejects a transaction, the approval process stops and the transaction is canceled.</td>
</tr>
</tbody>
</table>

**Guidelines for Managing Approval Rules**

Use the Manage Approval Transactions for Human Capital Management task to configure approval policies for HCM tasks such as Hire or Promote. This interface works in conjunction with the BPM Worklist, but enables users to identify approvers and configure approval rules easily for some frequently performed HCM tasks.

**Configuring Approval Policies**

For a selected task, you can configure the approval policy by arranging approvers in the required order, defining approval rules for each approver, and submitting the approval policy. The approval policy takes effect immediately and supersedes the current approval policy for the selected task; however, in-progress approvals complete as expected and do not switch to the new policy.

**Approvers**

You can add the following types of approvers:

- Management Hierarchy or Supervisory Hierarchy
- Users
• Approval groups, which you define in BPM Worklist
• Position hierarchy
• Representatives, who are workers with assigned responsibilities, for example Benefits Representative
• Application role
• Job-level based line manager hierarchy
• Self auto approve

When to Use the BPM Worklist
Use the BPM Worklist to:
• Configure notifications, including when notifications are issued
• Configure process details, such as expiration and escalation policies
• Define approval groups
• Define approval rules in advanced mode

You should use the BPM Worklist instead of the HCM Simplified UI if you are configuring complex rules. The simplified UI does not display more than 25 rules and does not allow more than 10 approvers in a single rule.

For any HCM tasks that are not available in the Manage Approval Transactions interface, you can use the BPM Worklist to configure all aspects of approvals. To configure in the BPM Worklist, use the Manage Task Configurations for Human Capital Management task.

Note: The HCM Simplified UI does not allow you to modify rules that were created using Advanced Mode in the BPM Worklist. If you originally created your rule conditions using Advanced Mode in the BPM Worklist, you must continue to use the BPM Worklist to make changes.

Approver Types
You can include any number of approvers of various types in your approval sequence by dragging and dropping them into the approval flow. This topic explains each of the approver types.

Management Hierarchy or Supervisory Hierarchy
You can include the following predefined types of managers in your approval sequence:

• Line manager
• Resource manager
• Project manager
• Regional manager

If your enterprise defines additional types of managers, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Users
You can include one or more Oracle Fusion Applications users in the approval sequence.
Approval Groups
You create approval groups using the BPM Worklist. When defining your approval sequence, you can enter the names of one or more existing approval groups.

Position Hierarchy
If you include a position hierarchy in your approval sequence, then position holders are invited to approve the transaction. For positions with more than one position holder, the transaction is approved by the first position holder to approve.

Responsibility Holders
You can include holders of the following predefined responsibilities in your approval sequence:

- Human Resources Representative
- Benefits Representative
- Union Representative
- Payroll Representative

If your enterprise defines additional responsibility types, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Human Resource (HR) Specialists assign responsibilities to workers using the Manage Areas of Responsibility task. A worker becomes an approver for a transaction if he or she has that responsibility for the transaction subject. For example, if you specify the Benefits Representative as an approver for a promotion, then the Benefits Representative of the worker who is being promoted is invited to approve the promotion.

Note: If you use a responsibility holder, then ensure that responsibility holders are already defined in the application. For example, if you include a HR representative as an approver for an employee process, then all employees must have HR representatives assigned to them.

Application Roles
You can use any of the existing duty roles to include in your approval sequence. If your enterprise defines duty roles for security purposes, then you can enter the duty role to include them in the approval sequence. Users with job or data roles that inherit the duty role become transaction approvers.

Job Level
You can include a job level in your approval sequence.

Job level routings are based on the manager hierarchy defined in Oracle Fusion Human Capital Management. The approval list is generated based on the starting level specified in a rule and continues until an approver with a sufficient job level is found. The approval flow uses the job level defined in the Manage Jobs interface.

Related Topics
- How You Assign Areas of Responsibility
HCM Approval Rules

Using the Manage Approval Transactions for Human Capital Management task, you can specify one or more approval rules for each task. To create more than one approval rule, you either add a rule or duplicate a selected rule and edit it as appropriate. When you create multiple approval rules for a task, they are evaluated in the order of the rule’s priorities. When the priorities are the same for different rules, they are executed in an undefined order, sequentially.

Approval rules comprise one or more IF statements and one or more THEN statements.

IF Statements (Conditions)

IF statements are tests that determine when an approval rule takes effect. For example, you could specify that an approval rule for a promotion takes effect when the worker’s department is Sales or the worker’s job is Area Manager.

You can specify multiple IF statements. If you join multiple statements with “AND” operators, then all statements must be true before the approval rule takes effect. If you join multiple statements with “OR” operators, then at least one of the statements must be true before the approval rule takes effect.

THEN Statements (Actions)

THEN statements specify:

- Who the approvers are
- What actions approvers can take

The following table summarizes the approval actions.

<table>
<thead>
<tr>
<th>Approval Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval required</td>
<td>Notifications are issued to the identified approvers and their response is required.</td>
</tr>
<tr>
<td>Automatic approval</td>
<td>No notifications are issued to the identified approvers. The transaction is either approved or rejected automatically, and the approvers are recorded as having approved or rejected the transaction. The value of the Set Outcome To attribute for manager hierarchies determines whether the transaction is approved or rejected.</td>
</tr>
<tr>
<td>FYI only</td>
<td>Notifications are issued to the identified approvers, but no response is expected.</td>
</tr>
</tbody>
</table>

For more information about creating approval rules, see the Oracle Fusion Middleware User’s Guide for Oracle Business Rules.
Management Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for manager hierarchies of predefined and locally defined types. This topic describes the values that you can specify in the THEN statements of approval rules for manager hierarchies.

Attributes

The following table summarizes the attributes of the manager-hierarchy approval rules and their default values.

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Description</th>
<th>Values</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action Type</strong></td>
<td>Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).</td>
<td>• Approval required</td>
<td>Approval required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Information only</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Automatic approval</td>
<td></td>
</tr>
<tr>
<td><strong>Route Using</strong></td>
<td>Allows users to choose which manager to route through.</td>
<td>• Resource manager</td>
<td>Line Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Line manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Project manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Regional manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Customer—Defined Manager Types</td>
<td></td>
</tr>
<tr>
<td><strong>Approval Chain of</strong></td>
<td>Allows users to choose which approval chain to use.</td>
<td>• Requester</td>
<td>Requester</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• User</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Worker</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Worker’s Current Line Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Worker’s Proposed Line Manager</td>
<td></td>
</tr>
<tr>
<td><strong>Start With</strong></td>
<td>• Identifies both the first approver and the manager hierarchy. By default, approval requests are sent to the requestor’s first-level manager, and the manager hierarchy is the one associated with the requestor’s primary assignment. The requestor is the worker who submits the transaction.</td>
<td>• Manager</td>
<td>Manager</td>
</tr>
<tr>
<td>Changed from Initial Approver</td>
<td></td>
<td>• Employee</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Second Level Manager</td>
<td></td>
</tr>
</tbody>
</table>
### Attribute Name | Description | Values | Default Value
--- | --- | --- | ---
<p>| • If you select a user in Approval Chain of, then the manager hierarchy is the one associated with that user’s primary assignment. For example, when promoting one of your direct reports you could select as initial approver a human resource (HR) specialist who is outside your manager hierarchy; approval requests from this rule would be directed to the manager hierarchy of the HR specialist’s primary assignment. | • Worker’s Current Line Manager | 1 | 1 |
| • If you select a user who is not a manager, then the rule fails. | • 1 or higher | 1 |
| <strong>Number of Levels</strong> | • Controls how far up the selected manager hierarchy approval requests are sent. The first level is based on the <strong>Start With</strong> value. • Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first. | • Worker | Manager |
| <strong>Top Approver</strong> | • Specifies an approver above whom approvals are not routed. • Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first. | • Worker’s Proposed Line Manager | Manager |
| For the top approver value, you can select: | • Worker | • Requester |  |
| • A different manager (first-level or second-level, as appropriate). | • User |  |
| • A user who is a manager from the same manager hierarchy as the initial approver. If you select a user who is not a manager or is from a different manager hierarchy from the initial | • Second Level Manager |  |</p>
<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Description</th>
<th>Values</th>
<th>Default Value</th>
</tr>
</thead>
</table>
| Action Type    | Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved). | • Approval required  
• Information only  
• Automatic approval | Approval required |
| Job Level      | The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value. | Minimum and maximum values relative to:  
• Initial approver  
• Requester | At most 1 relative to initial approver  
At least 1 relative to initial approver |
<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Description</th>
<th>Values</th>
<th>Default Value</th>
</tr>
</thead>
</table>
|                        | • You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction.  
• Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner. | Absolute minimum and maximum values                                                      |                                                   |
| Position Hierarchy     | • The name of the position hierarchy  
• You can select from all position hierarchies in the enterprise                                                                                                                                   | All position hierarchies in the enterprise                                                    | None                                              |
| Starting Position      | • The position of the first approver  
• The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve                                                                 | All positions in the selected position hierarchy                                              | None                                              |
| Changed from Initial Approver |                                                                                                                                                                                                 | Minimum and maximum values relative to:  
• Initial approver  
• Requester  
Absolute minimum and maximum values                                                     | At most 1 relative to initial approver  
At least 1 relative to initial approver                                                      |
| Job Level              | • The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value.  
• You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction.  
• Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner. | Minimum and maximum values relative to:  
• Initial approver  
• Requester  
Absolute minimum and maximum values                                                     | At most 1 relative to initial approver  
At least 1 relative to initial approver                                                      |
### Attribute Name | Description | Values | Default Value
--- | --- | --- | ---
reached, whichever is sooner. | Top Position | All positions in the selected position hierarchy | None

#### Top Position
- The position of the topmost approver
- The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve
- Approval routing stops when either the number of levels or the topmost approver is reached, whichever is sooner

#### Include
- Allows users to choose which approvers to include.
- All Approvers
- First and last approvers
- Last approver only
- All approvers

---

### How You Define an HCM Approval Policy

This example shows how to define an approval policy for employee hires in the Sales department using the Manage Approval Transactions for Human Capital Management task.

If the Department of the new hire is Sales, approvals should route to the first level line manager of the requester and FYI only to the HR Representative of the worker.

If the Department of the new hire is Finance, approvals should route to the second level line manager of the requester and FYI only to the HR Representative of the worker.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>This Example</th>
</tr>
</thead>
</table>
| Who will approve employee hire requests? | - Managers in the Sales department.  
- The human resources representative of any new hire doesn't need to approve but is informed of the hire after the relevant manager has approved. |
| Which approval actions must approvers take? | - Managers must approve the hire.  
- The human resources representative receives an approval notification for all hires, but no response is needed. |
| Can the required level of management approval vary? | The required level of approval varies with the grade of the new hire. |
Decisions to Consider | This Example
--- | ---
The requester’s: |  
- First-level manager approves the trainee grades 1 through 3  
- Second-level manager approves the professional grades 4 and above

Summary of the Tasks

To define the approval policy in this example, you:

1. Navigate to the Manage Approval Rules: Hire an Employee page.  
2. Assemble the approval sequence.  
3. Define the approval rule for trainee grades.  
4. Define the approval rule for professional grades.  
5. Define the approval rule for all grades.

Navigating to the Manage Approval Rules: Hire an Employee Page

1. In the Setup and Maintenance work area, click the Search button and search for the task Manage Approval Transactions for Human Capital Management.  
2. In the Search Results region, click the task name.  
3. On the Manage Approval Transactions page, enter the search term Hire in the Name field.  
4. Click Search.  
5. In the Search Results region, click the Configure button in the Rules column for the transaction Hire an Employee.

Assembling the Approval Sequence

1. On the Manage Approval Rules: Hire an Employee page, confirm that an entry for Line Manager appears in the Approval Sequence region.  
2. In the Approvers region, click the Add icon on the Human Resources Representative entry to add it to the right of the Line Manager entry in the Approval Sequence region.

Defining the Approval Rule for Trainee Grades

1. In the Approval Sequence region, select the Line Manager entry.  
2. Click the Edit icon to edit the rule settings.  
3. In the Name field of the Edit Rule Settings window, enter the rule name SalesHiresTraineeGrades. (The name can’t contain spaces.)  
4. In the IF statement for the SalesHiresTraineeGrades rule, click the Add icon to the right of the first condition to create an additional condition.  
5. Complete the fields of the two condition statements as shown in this table.
In the THEN statement for the SalesHiresTraineeGrades rule, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Approval required</td>
</tr>
<tr>
<td>Route Using</td>
<td>Line Manager</td>
</tr>
<tr>
<td>Approval Chain of Requester</td>
<td>Requester</td>
</tr>
<tr>
<td>Start with Manager</td>
<td>Manager</td>
</tr>
<tr>
<td>Number of Levels</td>
<td>1</td>
</tr>
<tr>
<td>Top Approver</td>
<td>Manager</td>
</tr>
</tbody>
</table>

Defining the Approval Rule for Professional Grades

1. Click Add Rule.
2. Click the Edit icon to edit the rule settings.
3. In the Name field of the Edit Rule Settings window, enter the rule name SalesHiresProfessionalGrades.
4. In the IF statement for the SalesHiresProfessionalGrades rule, click the Add icon to the right of the first condition twice to create two additional conditions.
5. Complete the fields of the three condition statements as shown in this table.

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Operator</th>
<th>Attribute Value</th>
<th>And or Or</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>==</td>
<td>Sales</td>
<td>and</td>
</tr>
<tr>
<td>Grade</td>
<td>&lt;=</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td>&gt;</td>
<td>3</td>
<td>and</td>
</tr>
<tr>
<td>Grade</td>
<td>&lt;=</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>
6. In the THEN statement for the SalesHiresProfessionalGrades rule, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Approval required</td>
</tr>
<tr>
<td>Route Using</td>
<td>Line manager</td>
</tr>
<tr>
<td>Approval Chain of</td>
<td>Requester</td>
</tr>
<tr>
<td>Start with</td>
<td>Second Level Manager</td>
</tr>
<tr>
<td>Number of Levels</td>
<td>1</td>
</tr>
<tr>
<td>Top Approver</td>
<td>Second Level Manager</td>
</tr>
</tbody>
</table>

Defining the Approval Rule for All Grades

1. In the Approval Sequence region, select the Human Resources Representative entry.
2. In the Rules region for the new rule, click the Edit icon to edit the rule settings.
3. In the Name field of the Edit Rule Settings window, enter the rule name SalesHiresAll Grades.
4. In the IF statement for the SalesHiresAllGrades rule, complete the fields of the condition statement as shown in this table.

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Operator</th>
<th>Attribute Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>==</td>
<td>Sales</td>
</tr>
</tbody>
</table>

5. In the THEN statement of the SalesHiresAllGrades rule, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Information Only</td>
</tr>
<tr>
<td>Representative Type</td>
<td>Human Resource Representative</td>
</tr>
<tr>
<td>Representative of</td>
<td>Worker’s Proposed Representative</td>
</tr>
</tbody>
</table>

6. Click Submit.
7 Integrated Workbooks

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

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

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

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

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

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

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

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

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

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

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

To view and resolve an error:

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

Related Topics
- How can I import stock data sent to me by my supplier
- Set Up Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Troubleshoot Desktop Integration for Excel
Overview of Base Pay Configuration

Configure compensation frequency values, grade rate validation data, and payroll elements for quoting and paying base pay. Also manage lookups, actions, and action reasons related to base pay management. Application implementors and compensation administrators use the Base Pay task list in the Compensation work area.

How Salary Works with Payroll Processing

Payroll processing calculates worker salary and annualized salary and pays workers each period using their salary bases and salary records. This figure summarizes how payroll processing uses the salary components and the following sections provide details about the components.
Salary Basis
The salary basis identifies the currency and period of the quoted base pay and the factor used to annualize base pay. It optionally identifies components used to itemize salary adjustments as well as the grade rate and differential profile used to validate salary.

Salary Record
The line manager or HCM specialist uses the salary record to:
- Associate a salary basis with the worker
- Enter or adjust the salary amount and component amounts or percentages

Salary Basis Types
The salary basis type specifies how to determine the salary amount for a worker. You select one of these types:
- Salary amount is determined by user
- Salary adjustment amount is determined by components

Create and manage salary bases using the Manage Salary Basis task in the Compensation work area. Use the Salary amount is determined by the user type for workers whose salaries are determined by grade step progression. When you use the other two types you must handle salary changes manually.

Salary Amount Is Determined by User
HR specialists or line managers enter worker salary amounts, adjustment amounts, or adjustment percentages.

Salary Adjustment Amount Is Determined by Components
Itemize the salary adjustment using components selected for the salary basis or allow managers to select components to use. You itemize the entire salary amount only for the first salary record. For all subsequent salary records, you itemize only the adjustment amount using percentages or amounts.

Example
In the first salary record, the HR specialist defines a 25,000 USD salary, as shown in this table.

<table>
<thead>
<tr>
<th>Component</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>20,000</td>
</tr>
<tr>
<td>Cost of living increase</td>
<td>3,000</td>
</tr>
<tr>
<td>Location</td>
<td>2,000</td>
</tr>
</tbody>
</table>
The following year, the manager adjusts that worker's salary by 4.5 percent, as shown in this table.

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit increase</td>
<td>3</td>
<td>750</td>
</tr>
<tr>
<td>Cost of living increase</td>
<td>1.5</td>
<td>375</td>
</tr>
</tbody>
</table>

**Related Topics**
- Salary Component Lookups

**Salary Basis Configuration Options**

The salary basis identifies the currency and period of the quoted base pay and the factor used to annualize base pay. It optionally identifies components or rates used to itemize salary adjustments and the grade rate used to validate salary. You configure salary bases using the **Manage Salary Basis** task in the Compensation work area. The following sections provide key information to help you correctly configure properties to support salary configurations and processing.

**Frequency and Annualization Factor**

Frequency defines the interval that the application quotes and stores the salary in, such as hourly or annually. The annualization factor is the multiplier that converts the salary amount to an annual salary amount, as shown in these examples.

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Annualization Factor</th>
<th>Salary (USD)</th>
<th>Annual Salary (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annually</td>
<td>1</td>
<td>31,200</td>
<td>31,200</td>
</tr>
<tr>
<td>Monthly</td>
<td>12</td>
<td>2,600</td>
<td>31,200</td>
</tr>
<tr>
<td>Hourly</td>
<td>2080</td>
<td>15</td>
<td>31,200</td>
</tr>
</tbody>
</table>

To match the salary basis frequency to the payroll frequency, select **Payroll period frequency** on the salary basis. A worker who has multiple assignments on different payroll frequencies requires a different salary basis associated with each assignment.

**Rounding Rules and Salary Amounts**

The salary amount rounding rule is used by calculations that include the salary amount, such as when the worker's salary increases based on a percentage. The rule always affects amounts from the point that it's set and onward.
doesn't affect amounts calculated before that point. For consistency across historical and current salary amounts, create another salary basis with the new rounding rule instead of editing an existing salary basis.

Decimal Precision and Rounding

We recommend that you match your salary amount rounding rule place with the salary basis decimal place to display. This table explains what happens when the decimal and rounding rule places don't match.

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

The salary basis decimal place to display is ignored by payroll element entries, which always use the decimal place of the currency definition. For example, US currency is defined to 2 decimal places. If your salary amount displays to 4 places, the element entries round the amount to 2 places.

Currency, Payroll Element, and Input Value

The salary basis holds the overall salary amount, which is passed to the element entry and used to process worker pay each pay period. You associate a payroll element and input value directly with the salary basis. The payroll element determines the salary currency. The legislative data group (LDG) limits the payroll elements that you can associate with the salary basis.

Salary Components (Optional)

You can use salary components on the salary basis to itemize salary adjustments into different reasons, such as merit, adjustment, and location. Component itemization is for reporting purposes only.

Grade Rate, Differential Profile, Salary Ranges, and Metrics

Salary metrics include compa-ratio, minimum, maximum, quartile, and range position. Salary metric calculations use these associated objects:
For example, you transfer an employee with an annual salary amount of 120,000 USD and the grade rate US Prof3 Annual to a new location. The employee’s salary basis includes a differential profile based on location. This table shows how the employee’s salary metrics change based on the employee’s locations.

<table>
<thead>
<tr>
<th>Salary Metrics</th>
<th>Calculated Results for Original Location Using a Differential of 1</th>
<th>Calculated Results for New Location Using a Differential of .8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range</td>
<td>100,000.00 -- 200,000.00 USD annually</td>
<td>80,000.00 -- 160,000.00 USD annually</td>
</tr>
<tr>
<td>Midpoint</td>
<td>150,000.00 USD</td>
<td>120,000.00 USD</td>
</tr>
<tr>
<td>Compa-Ratio</td>
<td>80</td>
<td>100</td>
</tr>
<tr>
<td>Range Position</td>
<td>20</td>
<td>50</td>
</tr>
<tr>
<td>Quartile</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Quintile</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

The legislative data group (LDG) limits the grade rates that you can associate with the salary basis. Also, the grade rate must have the same currency as the payroll element.

**Related Topics**
- Salary Component Lookups
- Grade Rates
- Create Compensation Payroll Elements

**How the Salary Basis Element and Legislative Data Group Affect Base Pay**

When selecting a payroll element and input value for a salary basis, the legislative data group (LDG) determines the elements available and other restrictions apply.

**Legislative Data Group**

You configure each salary basis for a specified legislative data group. If your organization has multiple legislative data groups, you must create a uniquely named salary basis for each unique set of characteristics applicable to each legislative data group.
Payroll Element
You attach a single existing payroll element to each salary basis to hold base pay earnings. The elements that are available to select meet the following criteria:

- Are valid for the selected legislative data group
- Are recurring
- Are classified as either Earning or Information
- Include eligibility definition
  The required element eligibility definition may include eligibility criteria, but criteria aren't required.
- Are defined at either the Assignment or Employment Terms level

Restrictions
You can link recurring elements to multiple salary bases only if you classify them as earnings elements and configure them to enable multiple entries in the same period. You might use the same payroll element when two salary bases with the same frequency use different grade rates. Examples:

- Headquarters-based grades have base pay of X
- Grades for all other locations have base pay of X - 2 percent

Input Value
When you define a base pay payroll element, you specify an input value that holds base pay on a worker's element entry. For both base pay salary and hourly wages the element input value is Amount. Entering or updating a base pay amount for a worker automatically updates the base pay element entry for that person.

The monetary amount or rate recorded in the element entry is the salary value in the worker’s salary information held on the assignment or employment terms. That amount is in the frequency of the worker’s salary basis.

This table shows how the payroll formula processes the input values of base pay element entries received in the frequency of the salary basis:

<table>
<thead>
<tr>
<th>Salary Basis Frequency</th>
<th>Amount Passed to Payroll</th>
<th>Payroll Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annually</td>
<td>Annual amount</td>
<td>Converts the annual amount to the appropriate payroll period amount.</td>
</tr>
<tr>
<td>Hourly</td>
<td>Hourly rate</td>
<td>Multiplies the hourly rate by the number of hours reported for the payroll period.</td>
</tr>
</tbody>
</table>

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

Currency
The element currency automatically determines the salary basis currency, in which the worker is paid.
Salary Components of a Salary Basis

You use salary components to itemize new or adjusted salary to reflect different reasons for the allocation, such as merit or location. To configure the use of salary components, use the Manage Salary Basis task in the Compensation work area.

Component Configuration

This table identifies key settings for salary basis configurations that include salary components.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Basis Type</td>
<td>Salary adjustment amount is determined by components</td>
</tr>
<tr>
<td>Components to Display When Adjusting Salary</td>
<td>Either of these:</td>
</tr>
<tr>
<td></td>
<td>• Select specific components to display during allocation</td>
</tr>
<tr>
<td></td>
<td>• Enable component selection during allocation</td>
</tr>
</tbody>
</table>

You can modify the available salary components by editing the CMP_SALARY_COMPONENTS lookup type using the Manage Lookups task in the Compensation work area.

Component Processing

When salary component values change, the payroll element holds the new salary amount calculated from the component adjustment. Payroll doesn't receive individual component values for processing.

Example

The worker's current salary is 31,200 USD. You enter component adjustment percentages and the application calculates the monetary amounts using the percentages, as shown in this table. It then sums the monetary amounts and the original salary amount to determine the new salary amount of 34,944 USD.

<table>
<thead>
<tr>
<th>Salary Component</th>
<th>Adjustment Percentage</th>
<th>Calculated USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>6</td>
<td>1,872</td>
</tr>
<tr>
<td>Promotion</td>
<td>4</td>
<td>1,248</td>
</tr>
<tr>
<td>Adjustment</td>
<td>2</td>
<td>624</td>
</tr>
</tbody>
</table>
How Many Salary Bases to Create

You must create a separate salary basis, with a unique name, for each unique combination of these characteristics associated with a worker’s base pay:

- Legislative data group
- Frequency of overall salary rate
- Annualization factor
- Payroll element of salary bases without rates
- (Optional) Salary components or rates
- (Optional) Grade rate

Using a descriptive name for the salary basis is a good practice if you require many salary bases in your organization. Examples are CA Hourly Wages, UK Annual Salary with Components, and Adjunct Pay 3 Credit Courses.

Use the following questions to help determine how many salary bases you require.

Legislative Data Group

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

Frequency

How many different frequencies for quoting base pay or overall salary rates are in use? Workers who have multiple assignments or employment terms on different payroll frequencies require a different salary basis be associated with each assignment or employment term. Salary bases that use rates can only be assigned to workers whose legal employers store salary at the assignment level.

Annualization Factor

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

Payroll Element

Do you want to use the same payroll element for different salary bases without rates? You can use the same payroll element in more than one salary basis, if the element meets these requirements:

- A recurring earnings element
- Configured to allow multiple entries in the same period
  
  You can't include these elements in overall salary derived rate definitions or rate definitions of type Element.
- Configured for the same legislative data group
Currency
In how many currencies do you pay worker within a single LDG? You must have one payroll element for each currency within an LDG. You must also have a separate salary basis for each base pay element or overall salary rate element.

Components
Do you want to itemize salary using components or rates? You require one additional salary basis for each additional unique collection of components or rates.

Grade Rates
How many grade rates do you require? The number of salary bases increases by one for each additional grade rate in use.

Related Topics
- Grade Rates
- Salary Component Lookups
- Create Compensation Payroll Elements

How You Populate Salary Info from Grade Ladder Rates
If you define a progression grade ladder to include fixed grade rates or step rates, you can have the rate automatically populate the salary record for manual transactions. Manual transactions include hire, transfer, promotion, or any employment transaction that causes a change to the worker’s grade ladder, grade or step. Use the Manage Salary Records and Manage Progression Grade Ladders tasks in the Compensation work area.

To automatically populate the grade or step rate ensure that the salary basis type for the salary record is Salary amount is determined by user. Set the Include Salary Updates field to Yes on the Manage Progression Grade Ladders task to use this feature. You still must enter a salary basis for a new hire.

Related Topics
- Progression Grade Ladders

Salary Validation Options
Salary validation helps you verify that salary allocations fall within the appropriate range for each worker. You can decide between two methods of validating salaries:
- Grade range validation produces a warning.
- Payroll element validation prevents approval.
Grade Range Validation
Generate a warning message when a manager or compensation professional enters a new or adjusted salary that's outside the worker's grade range. The worker's grade in the grade rate attached to the salary basis defines the minimum and maximum grade range values.

Payroll Element Validation
Prevent approval of a new or adjusted salary that doesn't pass validation configured on the payroll element input value. When you define an input value for the salary element, you can:

- Enter minimum and maximum valid values
- Write and attach a formula to perform validation

To vary the validation for different groups of workers, you can enter validation criteria as part of the element eligibility definition.

Related Topics
- Grade Rates

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 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>
<tr>
<td>Annualization factor</td>
<td>2080</td>
</tr>
<tr>
<td>Base Pay</td>
<td>15 USD</td>
</tr>
</tbody>
</table>

Calculation:

- Annual salary: 15 x 2080 = 31,200 USD
- Annualized full-time salary: 15 x (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:

<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>2080</td>
</tr>
<tr>
<td>Base Pay</td>
<td>15 USD</td>
</tr>
</tbody>
</table>

Calculation:

- Annual salary: 15 x 2080 x 0.5 = 15,600 USD
• Annualized full-time salary: 15 \times (2080/1) = 31,200 USD

The following table shows the inputs for this scenario for a monthly 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>12</td>
</tr>
<tr>
<td>Base Pay</td>
<td>5,000 USD</td>
</tr>
</tbody>
</table>

Calculation:
• Annual salary: 5,000 \times 12 = 60,000 USD
• Annualized full-time salary: 5,000 \times (12/0.5) = 120,000 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 USD
• Annualized full-time salary: 50,000 \times (1/0.5) = 100,000 USD

Worker's Hours Are Greater Than the Standard Working Hours

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

<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: is $20,000 \times 1 = 20,000$ USD
- Annualized full-time salary: $20,000 \times \frac{1}{1.2} = 16,667$ USD

### FAQs

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

The period type on the payroll linked to a worker's assignment or employment terms determines the number of payroll periods in a year.

**Can I use the same payroll element in more than one salary basis?**

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

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

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

**Can managers change the salary basis of a salary record?**

Yes, if you enable edit capability for the salary basis. You can hide or show the edit capability for managers using personalization on the pages where managers enter salary allocations.
What happens if a salary fails grade rate validation?
A warning message informs the manager or compensation professional that the salary is out of the valid range for the worker. The user can ignore the message or revise the salary to fall within the valid range.

Can I update an element mapped to a salary basis in use?
Yes, but the application recognizes the updated element or input value only on the next salary update. At that time, it end dates the element entry associated with the prior salary.
When you update the element mapping, no changes apply to the worker data.

References

Salary Component Lookups
Salary components itemize new or adjusted salary to reflect different reasons for the allocation. You can edit or add components to the Salary Component lookup type during initial implementation and at any later time. The following salary components are predefined:

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

To add to or edit these codes in the CMP_SALARY_COMPONENTS lookup type, search for the Manage Common Lookups task in the Search: Tasks pane or All Tasks tab search area.

Component Itemization
Component itemization is for notification purposes only. When component values change, the payroll element holds the new salary value calculated from the component adjustment. Payroll doesn't receive individual component values for processing.

Related Topics
- Overview of Lookups
9 Grade Step Progression

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 Salary Info from Grade Ladder Rates
- 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 though 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.

<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>Administrative Clerk I</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>
<tr>
<td></td>
<td>Meets or Exceeds Evaluation</td>
</tr>
</tbody>
</table>

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>
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.

Statuses

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
- Results

### 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>
</tbody>
</table>

By default, the process uses the assignment action from the progression grade ladder.
### 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 isn’t 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 Progress</td>
<td>Assignment effective date</td>
</tr>
<tr>
<td>Salary Update Transaction Date</td>
<td>Run Grade Step Progress</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.
10 Individual Compensation Plans

Overview of Individual Compensation

Application implementation managers and compensation administrators use the Individual Compensation task list in the Compensation work area to define Individual compensation and personal contribution plans. Tasks include:

- Configuring compensation plans, payroll elements, HR actions, and other objects to allocate off-cycle compensation to individuals or for personal savings and charitable contributions
- Adding payroll elements used in these plans to compensation history

Individual Compensation Plans

Individual compensation plans define compensation that managers can award to individual workers outside of the regular compensation cycle, such as a spot bonus or education reimbursement. They also enable workers to manage their own contributions to charitable or savings plans. Create individual compensation plans using the Manage Plans task.

The following components comprise the details of a plan:

- Options
- Payroll elements and input values for each option
- Budget pool for each option
- Payment dates
- Eligibility
- Plan access restrictions
- Instruction text

Options

Each plan must have at least one option with which you associate:

- Payroll element details to communicate the payment or distribution details to the payroll processing application
- Optional eligibility requirements to limit who’s eligible for the plan

Examples:

- A company car plan has options consisting of different compensation amounts for each vehicle model.
- A spot bonus plan has options consisting of different fixed monetary amounts.

You can associate each:

- Option with only one payroll element and input value
- Payroll element with only one plan and option
Payroll Elements and Input Values for Each Option
When you set up an element, you configure *input values* that determine the following:

- Compensation information that managers must enter when they award compensation under the plan
- Data that workers must enter when managing their own contributions in a plan
- Default values that aid managers or workers with data entry

Example: You configure an input value to enter the vehicle mileage when issued for a company car plan.

Budget Pool for Each Option
Link to a workforce compensation budget pool so that managers can track off-cycle and on-cycle awards. When they allocate individual compensation, they can see:

- Amounts given from the linked individual compensation plan
- How those amounts reduce a manager’s workforce compensation budget

Eligibility
*Eligibility profiles* control in which compensation plans or options a particular worker is entitled to participate. If adding multiple profiles, you must mark at least one as required. You can attach eligibility profiles to:

- A plan
- An option
- Both a plan and an option

Examples:

- Attach an eligibility profile to the company car plan to include only the sales department.
- Attach additional eligibility profiles to the vehicle model options to restrict luxury models to only executive positions.

Compensation eligibility evaluation processing also uses criteria defined at the element eligibility level to determine whether a person is eligible for a compensation plan. The best practice is to control eligibility either with eligibility profiles or through the element eligibility and not to mix the two methods.

Payment Dates
Select from standard date rules that:

- Specify when plan payments start (and end for recurring compensation)
  
  Example: Next payroll period start date
- Enable the manager or worker to enter start or end date

Plan Access Restrictions
Set critical plan access restrictions that control which users can initiate, update, or discontinue allocations in the individual compensation plan and under what circumstances.
Instruction Text
You can compose optional instruction text to assist managers or workers using the plan as well as include hyperlinks to relevant documents and websites.

Plan Access and Action Options
Plan access restrictions control the situations in which a line manager or worker can create, update, or discontinue allocations or contributions under an individual compensation plan. When you create an individual compensation plan you specify restriction details by action.

Whether to Restrict Access
The first decision you make on the Plan Access tab is whether to restrict access to the plan. Use the No option with caution. For example, if you don’t restrict access to a bonus plan, then individual workers could manage the bonus plan for themselves in their portrait. You would rarely select this option.

<table>
<thead>
<tr>
<th>Restrict Access</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>This plan becomes available to line managers and workers on all pages where you manage individual compensation or personal contributions.</td>
</tr>
<tr>
<td>Yes</td>
<td>To complete the plan access configuration, you must further define the restriction by selecting and adding actions and specifying any time constraints.</td>
</tr>
</tbody>
</table>

Restriction by Action
If you decide to restrict access, you must select at least one action. For each action added, you must specify the period in which the user can start, update, or discontinue allocations or contributions.

Important action options include:
- Specific HR actions
- Manage Individual Compensation
- Manage Contributions
- All

HR actions
Select one or more HR actions in which this plan should be available to the line manager or HR specialist for eligible workers during the corresponding HR transaction. For example, add a transfer action to a moving allowance plan to make it available when transferring a worker.
Manage Individual Compensation

Select this option to make the plan available to line managers in the Manager Resources Dashboard or Person Gallery, if the worker is otherwise eligible. The plans can be either related or unrelated to HR transaction. If you select other HR actions and don’t select this option, the plan is available to the manager only within the selected HR action transaction.

The following table shows examples of the Manage Individual Compensation action usage:

<table>
<thead>
<tr>
<th>Manage Individual Compensation Action Usage</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan is related to HR action</td>
<td>The spot bonus plan has a hire action to make it available for a hiring bonus while in the hire transaction. Add the Manage Individual Compensation action to provide alternative access to the spot bonus plan for use as a hiring bonus.</td>
</tr>
<tr>
<td>Plan is unrelated to HR actions</td>
<td>The Manage Individual Compensation action enables managers to use the spot bonus plan for special recognition, such as rewarding individuals for an important achievement or contribution.</td>
</tr>
</tbody>
</table>

Manage Contributions

Select this option if the plan is a worker contribution plan, such as a savings or charitable contribution plan. Also, specify additional access details, such as a restricted period for enrolling in, modifying, or discontinuing the plan. This action makes the plan available to eligible workers in their portrait.

Don’t select any additional actions for a worker contribution plan.

All

Selecting this option is similar to not restricting access, except that you can specify access details that apply to all actions. This option consists of all actions available in the list, including the Manage Contributions action, which makes the plan available to all workers who are otherwise eligible for the plan.

⚠️ Caution: Use this option with caution because it gives both workers and managers access to the plan. You would rarely select this option.

Examples of Individual Compensation Plans

You can use the Manage Plans task to create various individual compensation plans for one-time or ongoing payments or contributions. These scenarios show you some typical plans and provide the basic steps to set them up.
Spot Bonus

Scenario: Create a plan to make a one-time spot bonus payment.

Basic configuration steps:

1. Set up your payroll element to make a single payment of a manager-entered amount.
2. Process the payroll element once per payroll period.
3. Specify a payment start date. Leave the end date blank to indicate this is a one-time payment.
4. Optionally, add an eligibility profile to limit who the plan can apply to.

Example: Use derived factors to identify full-time employees with a minimum 1-year length of service.

5. Restrict access:
   - By HR action; select the appropriate actions related to hiring, adding, and promoting workers.
   - Add the Manage Individual Compensation action so that your managers can award the bonus in My Teams.

Stock Grant

Scenario: Create a plan to make a one-time stock grant.

Basic configuration steps:

1. Set up your payroll element to make a single payment of a manager-entered amount.
2. Process the payroll element once per payroll period.
3. Specify a grant start date. Leave the end date blank to indicate this is a one-time payment.
4. Optionally, add an eligibility profile to limit who the plan can apply to.

Example: Use derived factors to identify full-time employees with a minimum 5-year length of service.

5. Restrict access:
   - By HR action; select the appropriate actions related to hiring, adding, and promoting workers.
   - Add the Manage Individual Compensation action so that your managers can grant the stock in My Teams.

Car Allowance

Scenario: Create an ongoing car allowance plan with 2 payment options.

Example: Your regional sales managers are eligible for a car allowance. The radius of their territory in relation to headquarters determines the allowance amount. This table shows you the setup for each option.
### Radius from Headquarters vs. Monthly Allowance (US dollars)

<table>
<thead>
<tr>
<th>Radius from Headquarters</th>
<th>Monthly Allowance (US dollars)</th>
<th>Option Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than or equal to 100 miles</td>
<td>300</td>
<td>Recurring payroll element for territories within a 100-mile radius and an input value of 300</td>
</tr>
<tr>
<td>Greater than 100 miles</td>
<td>500</td>
<td>Recurring payroll element for territories outside of a 100-mile radius and an input value of 500.</td>
</tr>
</tbody>
</table>

Basic configuration steps; they are common to both plans:

1. Process the payroll elements once a month.
2. Enable your managers to enter start and end dates based on agreements with their workers. For example, a manager starts payment on the first of the month or the first payroll period after a promotion. The manager ends payment at the end of 1 year.
3. Attach an eligibility profile that limits eligibility to your employees with the Regional Sales Manager job.
4. Select actions related to hiring, adding, promoting, and transferring workers, to restrict access by HR action.
5. Add the Manage Individual Compensation so that your managers can award or update the car allowance in My Teams.

**Tip:** You can add instructions that inform managers of how the payment policy is based on radius.

### Worker Charity or Savings

Scenario: Create a plan that your workers use to manage their own contributions.

Basic configuration steps:

1. Set up a plan option for contributions of either amount or percentage.
2. Set up a payroll element with a corresponding input value of either a flat amount or percentage, to contribute per payroll period.
3. Enter a start date, typically January 1 of the next calendar year or after open enrollment.
4. Select the access action Manage Contributions to let your workers manage their instances of the plan. You can define periods where your workers can enroll for the first time, update existing contributions, or discontinue contributions. For example, enable your workers to always create allocations. Restrict allocation updates and discontinuations to a specified period, such as an open enrollment period of 15-30 November.
5. Add instructions that clarify specific plan policies for your workers, as needed.
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.

FAQs

Why can't I add an action to restrict access to an individual compensation plan?

When All is currently selected as the action value on the Create Individual Compensation Plan page, Plan Access tab, the Add action is disabled. To make the plan available only for specific HR actions, replace the value of All by selecting a specific action. After selecting the first HR action, you can add rows and select additional actions. Specify access details for each individual HR action that you select.

Use the All option with caution because it gives both workers and managers access to the plan. You would rarely select this option. After you replace the value of All, the plan is available only in the transactions that you select.

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

Role based security determines access to the work area where individual compensation can be awarded or updated. Restriction by HR action provides a more granular way to control when users can add, edit, or delete individual compensation under the plan based on the HR action.
11 Compensation History

Compensation History Categories

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

Salary

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

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

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

Stock

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

Other Compensation

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

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

How You Configure the Compensation History Summary Table

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

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

Automatic Compensation History Setup

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

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

Manual Compensation History Setup

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

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

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

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.

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.
Optionally install the following from the Microsoft website.
   o Microsoft .NET Framework 4.5.2
   o 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. Click Navigator > Tools > Download Desktop Integration.
3. Run the addfdi-excel-addin-installer.exe installer as you would run 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.

Statues
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.

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

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

Best Practices for Configuring Workforce Compensation Plans

Decisions you make when you set up a Workforce Compensation plan impact the worksheet response time when managers allocate compensation. Tabbing, scrolling, and real-time values calculations affect the worksheet performance. While you can’t avoid real-time value calculations completely, you can make sure you’re using them effectively.

Alerts and Dynamic Calculations

Real-time calculations occur when you select the Change worksheet data trigger on the Configure Alerts or Manage Dynamic Calculations pages. The more you use this trigger or the more conditions within a calculation, the longer the worksheet takes to respond.

Every time a manager tabs out of a field, the application evaluates each condition in each item with that trigger enabled. For example, you have four columns with a dynamic calculation, with five conditions each. The application evaluates 20 conditions, regardless of whether or not the column being populated has a dynamic column configured for it.

To lessen the impact, only configure dynamic columns where you really want to test worksheet performance, and then add additional dynamic columns as needed.

Separate Plans for Different Roles

You should consider your audience when you set up calculated columns. For example, if you want to calculate values in columns for administrators to view on the Administer Workers task, you can create a separate plan for those values. Then, use the cross referencing feature to supply the value to the manager’s worksheet. This set up decreases the number of dynamic columns processed during batch processing and worksheet data changes.

Separate Worksheet Tasks

The overall number of columns enabled in the worksheet can also affect performance. You can disable all the Personal and Employment columns on the Compensation task type. Then, enable a Detail Table Only task type to show all the personal and employment information for workers. Managers have access to the information within the plan with fewer columns on the allocation sheet means less scrolling and better performance.

Validate Plan and Test Worksheet Performance

When you complete your setup and before you start my plan, validate the plan to ensure the evaluation order is correct for any dynamic columns. Improperly sequenced dynamic columns can have unexpected results, cause confusion.
Conclusion

Workforce Compensation is flexible and can accommodate a wide variety of requirements. However, some of these accommodations can make it difficult for users by slowing the performance.

Some things to keep in mind when you set up your plans are:

- Use default methods, like external data, to refrain from doing calculations in Fast Formula. While this doesn’t improve worksheet performance, it improves the batch processes performance.
- Create an administrative plan for all the calculations. Then you can return the results to the managers’ plan by cross referencing the columns.
- Limit the number of dynamic calculations and alerts that use the Change worksheet data trigger.
- Enable Detail Tables for personal and employment information so that managers can see information within the plan without navigating to HR or scrolling through the worksheet.
- Validate the plan after you complete your setup to make sure dynamic columns have the evaluation orders properly sequenced.
- Test performance in the production environment by starting the plan, setting the status to Administrative, and checking the worksheet performance.

Workforce Compensation Security

A combination of plan configuration, a person’s user role, and a person’s security profile controls workforce compensation security.

Plan Configuration

Selections you make when you configure the plan affect security in the following ways:

- Plan hierarchy controls manager worksheet access and the workers a manager can see within each plan.
- Plan access overrides delivered security by limiting plan access to certain roles.
- Plan status controls manager access to plans, including whether a plan is available to only administrators.

User Roles

User roles control access to plans as follows:

- Delivered job roles and duty roles contain elements used to act on and manage workforce compensation plans.
- You can create your own roles to give or remove access to specific compensation tasks.
Person Security Profile

A person’s security profile:

- Controls the managers the person can switch to in the Workforce Compensation work area
- Controls people the person can search for and act on in the Administer Workers page in the Compensation work area
- Determines the workers included in the full administrative download

For more information about workforce compensation security see Security and Workforce Compensation (Doc ID 1556468.1).

FAQ

How can I Set Up Models So That Managers Can Use Them on Their Worksheets?

When you configure your workforce compensation plan worksheet page display, enable the three modeling options on the Actions tab. On the Configure Modeling page, select the allocation methods and model usage options. Now, managers can open, create, and apply models on their worksheets.
13 Workforce Compensation Plan Details

Options to Choose Employment Record for Compensation Cycle

The type of employment record selected for a plan determines the employment records evaluated by the start compensation cycle process and which records the compensation cycle uses. Use the Configure Plan Details page to select the employment records.

Determine the record to use by selecting one of the four options:

- Primary assignments
- All assignments
- Employment terms
- Any assignment or employment term with a salary

Primary Assignments
The start compensation cycle process includes and evaluates eligibility for primary assignments only. If a worker has multiple assignments, the worker appears only on the primary assignment manager's worksheet, if the plan uses a manager hierarchy.

All Assignments
The start compensation cycle process includes and evaluates eligibility for all assignments.

- If a worker has multiple assignments, the worker may appear on one manager's worksheet more than once.
- If the manager on each assignment is different, the worker may appear on multiple managers' worksheets.

Employment Terms
The start compensation process includes and evaluates eligibility for employment terms of legal employers that use the three-tier employment model. If the plan uses a manager hierarchy, workers appear on the primary assignment manager's worksheet.

The process does not evaluate workers whose legal employer uses a two-tier employment model.

Any Assignment or Employment Term with a Salary
The start compensation process includes and evaluates eligibility for all assignments with a salary record and employment terms with a salary record.

- If the plan uses a manager hierarchy, workers appear on the primary assignment manager's worksheet.
- If a worker has multiple assignments with a salary record, the worker may appear on one manager's worksheet more than once with a different base salary for each assignment.
- If the manager on each assignment is different, the worker may appear on multiple managers’ worksheets with different salaries for each.

The process does not evaluate assignments and employment terms that don’t have a salary record associated.

How Actions and Reasons, Salary Components, and Plan Components Work Together

Salary components and plan components work with actions and reasons to classify compensation transactions. This figure shows how the salary components and plan components work with actions and reasons to classify compensation transactions.
Actions and Reasons in Workforce Compensation

When you set up a workforce compensation plan, you must select an action and optional action reason on the Configure Plan Details page. They're associated with all salary and assignment records when you transfer data to HR after the cycle is complete. Other HR transactions use the same action framework.

You have one action and ten action reasons to use with workforce compensation plans. You can expand this list to add additional actions and reasons.

The action provided is Allocate Workforce Compensation. Action reasons provided are:

- Anniversary
- Career Progression
- Cost of Living Adjustment
- Market Adjustment
- Mass Adjustment
- Merit
- Outstanding Performance
- Performance
- Periodic Review
- Promotion

Example: You set up a plan where managers allocate only merit increases during the compensation cycle, as follows:

- The action is Allocate Workforce Compensation.
- The action reason is Merit.

The batch process updates salary records after the compensation cycle is over. Now, the Allocate Workforce Compensation action and Merit action reason appears in the worker's history for that salary record.

Actions and Reasons in Individual Compensation

Individual salary transactions also have an action and optional action reason associated with them. The action and action reason identify the reason for the salary adjustment.

Examples:

- You adjust the salary while promoting a worker or if a worker relocates.
  - The action is Transfer or Relocation.
  - The action reason is the same.

- A compensation or HR specialist adjusts a worker's salary:
  - The action reason is Change Salary.
  - The reason is Adjustment.
Salary Components

You can itemize a worker’s salary record using salary components. These salary components associate an adjustment amount with a specific reason.

The following table shows how a manager might determine a worker’s salary adjustment.

<table>
<thead>
<tr>
<th>Salary Component</th>
<th>Change Percentage</th>
<th>Change Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>5</td>
<td>5,000</td>
</tr>
<tr>
<td>Cost of Living Adjustment</td>
<td>2</td>
<td>2,000</td>
</tr>
<tr>
<td>Promotion</td>
<td>1</td>
<td>1,000</td>
</tr>
<tr>
<td>Total Adjustment</td>
<td>8</td>
<td>8,000</td>
</tr>
</tbody>
</table>

The worker’s salary total salary increase is 8,000 USD and the salary record stores the itemization of that eight percent into the components shown.

The Salary Component lookup type contains some commonly used salary components. You can also add new components to the lookup at any time.

Workforce Compensation Plan Components

When you create workforce compensation plans, you define up to five components that represent compensation awarded in the plan, and indicate whether they represent salary.

Plan components can be:

- The same type of compensation, such as Merit, Cost of Living Adjustment, and Market Adjustment, all of which adjust a worker’s salary.
- Different types of compensation within the same plan, such as Salary, Bonus, and Stock.

Optional Plan Component Mapping to Salary Components

Workforce compensation plan components are informational only. To transfer plan component itemization of salary adjustments to the salary records, you must map the plan components to salary components. Map plan components to salary components using the Element Mapping section on the Configure Column Properties page.

Related Topics

- How Action Components Work Together
- Salary Component Lookups
- Options to Configure the Element Mapping Section
Plan Statuses

Plan status identifies the state of the plan and any plan cycles already started or completed. Use the Configure Plan Details page to select the plan status. The two plan statuses are:

- Active
- Inactive

Active Plan Status

The plan is available for use and you can start a plan cycle. Line managers can access the plan from the Workforce Compensation work area at any time during the period that the worksheet is available to managers. Compensation managers can access the plan from the Compensation work area to view plan data even after you transfer the data to HR.

Inactive Plan Status

The plan is no longer available for use and isn’t available to view or update. Compensation administrators can change the status back to Active from the Configure Plan Details page. Use this status to create and test plans, or for obsolete plans. You can purge only plans with this status from the application.
14 Plan Eligibility

How Eligibility Works With Other Objects

You add eligibility criteria to an *eligibility profile*, and then associate the profile with an object that restricts eligibility. The following figure shows the relationships between eligibility components.

![Diagram showing the relationships between eligibility components](image)

**Eligibility Criteria**

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

**Eligibility Profile**

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

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

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

Related Topics

- User-Defined Criteria
- Derived Factors
- Eligibility Profiles

Options to Track and Display Ineligible Workers

When you configure workforce compensation plan eligibility, you can use two check boxes to track ineligible workers and hide them on the worksheet. Tracking and hiding are two different choices that work together to control how ineligible workers appear on the worksheet.
Ineligible Worker Tracking and Hiding

These points describe what happens when you track ineligible workers:

- The application creates a worksheet record for workers found ineligible during the start workforce compensation or refresh process.
- The ineligible workers appear on the worksheet and the Administer Workers page in the Compensation work area.
- Ineligible workers are shown as **Ineligible** and all entry fields are not editable.
- Managers or administrators can request a worker's eligibility change.

When you don't track ineligible workers administrators must process the workers to include them in the plan. Whether or not you track ineligible workers, you can hide ineligible workers from the worksheet.

Worksheet Effects

The following table shows how enabling and disabling the two check boxes affects which workers appear on the worksheet.

<table>
<thead>
<tr>
<th>Track Ineligible Workers</th>
<th>Hide Ineligible Workers</th>
<th>Worksheet Effects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabled</td>
<td>Enabled</td>
<td>Workers found ineligible by the start workforce compensation or refresh process do not appear in the worksheet. Eligible workers made ineligible mid-cycle drop off the worksheet.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Disabled</td>
<td>Workers found ineligible by the start workforce compensation or refresh process appear in the worksheet. Eligible workers made ineligible mid-cycle remain on the worksheet.</td>
</tr>
<tr>
<td>Disabled</td>
<td>Enabled</td>
<td>Workers found ineligible by the start workforce compensation or refresh process do not appear in the worksheet. Eligible workers made ineligible mid-cycle drop off the worksheet.</td>
</tr>
<tr>
<td>Disabled</td>
<td>Disabled</td>
<td>Workers found ineligible by the start workforce compensation or refresh process do not appear in the worksheet. Eligible workers made ineligible mid-cycle remain on the worksheet.</td>
</tr>
</tbody>
</table>
FAQs

What happens if I track ineligible workers?
The worksheet displays ineligible workers but managers can't allocate compensation, promote workers, or rate worker performance. Managers or administrators can change an ineligible worker’s status to eligible.
If you also select to hide ineligible workers, then the worksheet doesn’t display the ineligible workers on the worksheet.
You select to track, show, or hide ineligible workers on the Configure Eligibility page.

What happens if I include recently terminated workers in the Start Compensation Cycle process?
Terminated workers appear on the worksheet if their termination date is between the cycle evaluation start date and the HR data extract date and you don’t hide ineligible workers. They must also meet the plan eligibility requirements. Individuals who don’t meet these criteria aren’t included on the worksheet or in the Start Compensation Cycle process if you don’t track ineligible workers. You select to hide ineligible workers on the Configure Plan Eligibility page.

What happens if my eligibility requirements are different for the components than for the plan?
The application evaluates the plan-level eligibility before component level eligibility.
• A worker must be eligible for the plan to be eligible for a component.
• Each component can have distinct eligibility requirements.
• A worker who is eligible for the plan might or might not be eligible for one or more components in the plan.
You configure eligibility on the Configure Plan Eligibility and Configure Compensation Components pages.

What happens if I don't select the Required option when I add an eligibility profile to an object?
If you add only one eligibility profile to an object, then the criteria in that profile must be satisfied, even if the Required option isn’t selected.
If you add multiple eligibility profiles, the following rules apply:
• If all profiles are optional, then at least one of the profiles must be satisfied.
• If all profiles are required, then all of the profiles must be satisfied.
• If some but not all profiles are required, then all required profiles must be satisfied and at least one optional profile must also be satisfied.
## 15 Plan Cycles

### Plan Cycle Dates

Plan cycle dates are the dates within a workforce compensation plan cycle that determine a variety of aspects, such as access and eligibility. A plan can have multiple plan cycles, each with a unique set of dates. You can configure several dates for a plan cycle using the Create or Edit Plan Cycles dialog box. The following table describes the plan cycle dates.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Period Start and End</td>
<td>Period in which you evaluate compensation. Informational only.</td>
</tr>
<tr>
<td>Plan Access Start and End</td>
<td>Period in which managers can see active plans in read-only mode.</td>
</tr>
<tr>
<td>Worksheet Update Period Start and End</td>
<td>Period in which managers and administrators can update active plans.</td>
</tr>
<tr>
<td>HR Data Extraction</td>
<td>Date as of which the application initially extracts person and assignment data from HR and places it in the compensation tables for use during the compensation cycle.</td>
</tr>
<tr>
<td>Eligibility Determination</td>
<td>Date on which the application evaluates workers' records for eligibility.</td>
</tr>
<tr>
<td>Currency Conversion</td>
<td>Date as of which the application obtains conversion rates from the GL daily rates table to convert monetary amounts into different currencies.</td>
</tr>
<tr>
<td>Performance Rating</td>
<td>Date to use for compensation performance ratings. Using the same date in multiple plans makes the same ratings available to all of those plans when managers give compensation performance ratings.</td>
</tr>
<tr>
<td>Default Promotion Effective</td>
<td>Date on which job, grade, and position changes take effect. Using the same date in multiple plans makes the promotions available to all of those plans when managers promote workers. Managers can override this date in the worksheet or you can set the date when running the Transfer Data to HR process.</td>
</tr>
<tr>
<td>Default Due</td>
<td>Date by which all managers are to submit their worksheets. Informational only. Configure different dues dates by hierarchy level. Optionally you can notify managers when a date changes.</td>
</tr>
</tbody>
</table>
How You Configure the Promotion Effective Date in Workforce Compensation

You can define a default effective date for all workers promoted through a workforce compensation plan. You can enable managers to override the default date for individual workers they promote during the compensation cycle. The application uses the default effective date to obtain:

- New salary range
- New compa-ratio
- Other new salary metrics when a promotion involves a change to a worker’s grade

To define the Promotion Effective Date configure the following:

- Default promotion effective date for the plan cycle
- Worksheet column properties of the Promotion Effective Date column

Default Promotion Effective Date for the Plan Cycle

When you set up a plan, you configure the default promotion effective date using the Create Plan Cycles dialog box. The Promotion Effective Date column uses this default date for all workers in the worksheet.

Worksheet Column Properties of the Promotion Effective Date Column

You can display the Promotion Effective Date column in the worksheet. When you configure the column properties for the Promotion Effective Date column using the Configure Column Properties page you can:

- Enable managers to override the default date for individual workers they promote during the compensation cycle.
- Specify whether the Promotion Effective Date column is subject to refresh by the Refresh Data process. The following table compares the refresh results when the promotion effective date column is subject to refresh and when it's not:

<table>
<thead>
<tr>
<th>Subject to Refresh</th>
<th>Description of Refresh Processing</th>
</tr>
</thead>
</table>
| Yes                | a. A manager overrides the default promotion effective date.  
b. The Refresh Data process changes the worksheet column date back to the default promotion effective date set for the plan cycle.  
c. The process then uses the date to refresh the new salary metrics. |
| No                 | The Refresh Data process uses the date in the worksheet column to refresh the new salary metrics. The date in the worksheet column is either:  
  o Default promotion effective date for the plan cycle  
  o Manager's overriding date |
Related Topics

- Refresh Data Process Options
- Overview of Column Properties
16 Hierarchies

Matrix Hierarchies

You can create up to three hierarchies for a workforce compensation plan that enable multiple managers to have insight and input into a worker’s award during a workforce compensation cycle. You define hierarchies on the Configure Hierarchies page when you create a workforce compensation plan.

Hierarchies

Hierarchies determine how the application decides who are primary worksheet managers and which workers appear on their worksheets. For the primary hierarchy, it also determines how budgets roll down and approvals are routed. The primary hierarchy is the main hierarchy of worksheet managers. The secondary and the review hierarchies give other people access to the same set of workers to give feedback and propose allocations. They are optional hierarchies.

Worksheet Actions

The following table shows what actions are available to the managers on the worksheet for each hierarchy:

<table>
<thead>
<tr>
<th>Hierarchy</th>
<th>Actions Available</th>
</tr>
</thead>
</table>
| Primary   | Primary worksheet managers can:  
|           | • Accept or overwrite secondary manager or other reviewer proposals  
|           | • Allocate compensation  
|           | • Approve worksheets  
|           | • Submit worksheets  
|           | • Allocate budgets  
|           | • Model compensation  
| Secondary | Secondary managers can:  
|           | • View compensation information  
|           | • See subordinate workers down the hierarchy  
|           | • Propose allocations  
|           | • Save allocations  
| Review    | Other reviewers can:  
|           | • View compensation information  
|           | • Only see direct reports  
|           | • Propose allocations  
|           | • Save allocations  

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Hierarchies
If a manager doesn't have a secondary managed plan or other plan to review, those regions don't appear in the available plans window.

**Examples**

Some examples of matrix hierarchies are:

<table>
<thead>
<tr>
<th>Matrix Hierarchy</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country-based Primary Hierarchy and a Secondary Hierarchy</td>
<td>Enables country leaders to manage the budget and allows line managers to manage the compensation for their organization.</td>
</tr>
<tr>
<td>Secondary Hierarchy</td>
<td>Gives a dotted line manager access to a worker's compensation if the worker completed a project for the manager.</td>
</tr>
<tr>
<td>Review Hierarchy</td>
<td>Gives an India HR specialist access to all eligible India workers regardless of who is their primary worksheet manager.</td>
</tr>
</tbody>
</table>

**Related Topics**

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

**Options to Configure Matrix Hierarchies**

You can create up to three hierarchies for a single compensation plan to give multiple managers different levels of access to the same workers. For each hierarchy you specify the source of the reporting structure, error handling, and default access levels. Use the Configure Hierarchies page to configure these matrix settings:

- Source
- Missing Manager Handling
- Missing Relationship Records
- Default Access Level

**Source**

You select a reporting structure to build the worksheet for each hierarchy. You must select a source for the primary hierarchy even if you don't enable a secondary or review hierarchy. Select one of the five options shown in the following table:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Manager Hierarchy</td>
<td>The primary worksheet manager associated with the worker's assignment record determines the hierarchy.</td>
</tr>
</tbody>
</table>
### Options and Description

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Manager Hierarchy</td>
<td>Another manager type associated with the worker's assignment, such as project manager or resource manager, determines the hierarchy.</td>
</tr>
<tr>
<td>Formula</td>
<td>A user-defined hierarchy created using a fast formula determines the hierarchy</td>
</tr>
<tr>
<td>Position Tree</td>
<td>The structure of the position tree determines the hierarchy.</td>
</tr>
<tr>
<td>Department Tree</td>
<td>The manager defined for a department tree determines the hierarchy.</td>
</tr>
</tbody>
</table>

### Missing Manager Handling
You can specify how to handle a worker who does not have a manager by selecting one of these values:

- Leave blank (compensation administrator fixes manually)
- Use primary manager
- Search tree until found (available when you select position or department tree)

### Missing Relationship Records
You can record missing relationships in the Start Compensation Cycle and Refresh Compensation Data process log files. When you select this option, the processes then include hierarchy breaks in the log files.

Examples of hierarchy breaks are when a worksheet manager doesn't have a manager or a worker doesn't have a primary line manager on their assignment. You want to correct the condition so that worksheets roll up properly and include all eligible workers.

### Default Access Level
You decide the update and access levels for managers by selecting a default access level or by using a formula. You might use a formula when you want different sets of managers to have different access. For example, you use the standard manager hierarchy to build the hierarchy, but only enable Grade M4 and higher managers to have access to update. All other managers have no access.

**Note:** The hierarchy doesn't change when you change the access level.

Select one of these access levels:

- Updates allowed
- No updates allowed
- No access

### Related Topics

- Formula Type for Compensation Hierarchy Determination
- Overview of Using Formulas
- HCM Trees
Formula Type for Compensation Hierarchy Determination

The Compensation Hierarchy Determination formula determines the hierarchy for an associated workforce compensation plan. You select the formula on the Configure Hierarchies page.

Contexts
The following contexts are available to formulas of this type:

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

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.

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

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

Return Value | Data Type | Required | Description
---|---|---|---
L_PERSON_ID | Number | Y | Person ID of manager
L_ASSIGNMENT_ID | Number | Y | Assignment ID of manager

Or

Return Value | Data Type | Required | Description
---|---|---|---
L_PERSON_NUMBER | Number | Y | Person number of manager

You receive the following error if the formula returns an invalid PERSON_NUMBER and the application can't obtain the ASSIGNMENT_ID:
Formula passed in an invalid person number <15465857>. Assignment ID could not be obtained.

Sample Formula

This sample formula determines the manager of a person when the assignment_id is passed.

```sql
/****************************************************/
FORMULA NAME : Compensation Hierarchy Determination Formula
FORMULA TYPE : Compensation Hierarchy Determination
DESCRIPTION: Hierarchy determination fast formula which is based on assignment_id
**********************************************************/

/******* INPUT VALUES DEFAULTS BEGIN ***********/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number)
/******* INPUT VALUES DEFAULTS END **********/

/******* FORMULA SECTION BEGIN ***********/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
L_PERSON_ID = '0' L_ASSIGNMENT_ID = '0'
if (CMP_IV_ASSIGNMENT_ID = 100000008154060 ) THEN
  (L_PERSON_ID = to_char(-999) //-999 indicates top level
  //Manager.
  L_ASSIGNMENT_ID = to_char(-999))
ELSE
  (L_PERSON_ID = to_char(100000008153756)
  L_ASSIGNMENT_ID = to_char(100000008154060))
RETURN L_PERSON_ID , L_ASSIGNMENT_ID
/******* FORMULA SECTION END ***********/
```

Formula Type for Compensation Default and Override

The Compensation Default and Override formula determines the default values populated in a column for a workforce compensation plan. When you configure the worksheet display for a column in the Configure Column Properties page, Default Values section, you can select this formula.

The following predefined formulas are available for the eligible salary column for this formula type.

**Caution:** Use these formulas as samples for testing purposes only. Copy and create your own version of a formula for use in your own compensation plans. Modifying the sample formula might provide unexpected results upon upgrade.

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE</td>
<td>Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_MONTH_END_AVERAGE</td>
<td>Eligible salary calculated by averaging salary on the last day of each month in the workforce compensation cycle evaluation period. Uses salary on the last day of the evaluation period for midmonth evaluation end dates.</td>
</tr>
</tbody>
</table>
### Formula

<table>
<thead>
<tr>
<th>Formula</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_NINETY_DAY_MIN</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_USING_FTE</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_FOR_JOBS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period. Returns zero for workers who worked fewer than 90 days.</td>
</tr>
<tr>
<td>Eligible salary calculated by averaging daily salary adjusted for part-time workers. Accounts for number days that a salary is in effect and FTE during the workforce compensation cycle evaluation period.</td>
</tr>
<tr>
<td>Eligible salary calculated by averaging salary for the number of days a worker holds a specific job code on the assignment. Accounts for the number of days that a salary is in effect during the workforce compensation cycle evaluation period.</td>
</tr>
</tbody>
</table>

### 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 Value | Data Type | Required | Description
---|---|---|---
CMP_ IV_ PLAN_ID | Number | Y | Unique numeric identifier for the workforce compensation plan
CMP_ IV_ PERIOD_ID | Number | Y | Unique numeric identifier for the fiscal calendar period
CMP_ IV_ COMPONENT_ID | Number | Y | Unique numeric identifier for the workforce compensation plan component
CMP_ IV_ ITEM_NAME | Char | Y | Name for the workforce compensation plan item
CMP_ IV_ PERSON_ID | Number | Y | Unique numeric identifier for the worker associated with the workforce compensation plan
CMP_ IV_ PLAN_ START_DATE | Date | Y | Date on which the workforce compensation plan becomes active
CMP_ IV_ PLAN_ END_DATE | Date | Y | Date on which the workforce compensation plan becomes inactive
CMP_ IV_ PLAN_ ELIG_DATE | Date | Y | Date on which the workforce compensation plan becomes eligible
CMP_ IV_ PERFORMANCE_ EFF_DATE | Date | Y | Date to use for compensation performance ratings
CMP_ IV_ PROMOTION_ EFF_DATE | Date | Y | Date on which job, grade, and position changes take effect
CMP_ IV_ XCHG_ RATE_DATE | Date | Y | Date on which the application obtains conversion rates from the GL daily rates table
CMP_ IV_ ASSIGNMENT_ID | Number | Y | Date to use for assignments

### Return Values
The following return variables are available to formulas of this type.
Sample Formula

This sample formula determines the value of a column based on its item name.

```sql
/*------------------------------formula name : Compensation Default and Override Formula-----------------------------*/
FORMULA TYPE : Compensation Default and Override
DESCRIPTION : Defaults the value of a column based on its item_name

/*-------------- INPUT VALUES DEFAULTS BEGIN -----------------------------*/
INPUTS ARE CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number),
CMP_IV_ITEM_NAME (text)
/*-------------- INPUT VALUES DEFAULTS ENDS----------------------------*/

/*---------------- FORMULA SECTION BEGIN -----------------------------*/
DEFAULT FOR CMP_IV_ITEM_NAME IS 'YYYYYYY'
L_DEFAULT_VALUE = to_char(0)
IF (CMP_IV_ITEM_NAME = 'AmountComp1') THEN
  {L_DEFAULT_VALUE = to_char(3333)}
ELSE IF (CMP_IV_ITEM_NAME = 'AmountComp2') THEN
  {L_DEFAULT_VALUE = to_char(7777)}
ELSE
  {L_DEFAULT_VALUE = to_char(-999)}
RETURN L_DEFAULT_VALUE
/*---------------- FORMULA SECTION END -----------------------------*/
```
17 Plan Currency

Options to Determine Local Currency

If you have global plans that pay workers in different currencies, specify the method of determining each worker's local currency for each component. Use the Configure Plan Currency page to select the currency from among the following:

- Corporate currency
- Element input currency
- Legal employer currency
- Salary basis currency
- Formula

Local Currency Determination
The following table describes the currency options:

<table>
<thead>
<tr>
<th>Currency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate</td>
<td>The corporate currency defined for the plan determines the local currency.</td>
</tr>
<tr>
<td>Element Input</td>
<td>The input currency of the payroll element mapped to the component determines the local currency.</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>The currency defined by the worker's legal employer determines the local currency.</td>
</tr>
<tr>
<td>Salary Basis</td>
<td>The payroll element associated with the salary basis definition linked to the worker's employment record determines the local currency.</td>
</tr>
<tr>
<td>Formula</td>
<td>A formula you create to retrieve the currency from some other source determines the local currency.</td>
</tr>
</tbody>
</table>

Related Topics

- Overview of Using Formulas
- Formula Type for Compensation Currency Selection
Formula Type for Compensation Currency Selection

The Compensation Currency Selection formula determines the currency associated with a workforce compensation component. You select the formula on the Configure Compensation Components page.

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.

<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_ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Assignment 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_COMPONENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Component ID</td>
</tr>
</tbody>
</table>
## Plan Currency

<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_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_EXTRACTION_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Extraction 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_CURR_CODE</td>
<td>Char</td>
<td>N</td>
<td>Currency code from the formula</td>
</tr>
</tbody>
</table>

## Sample Formula

This sample formula determines the currency for a plan based on the component ID.

---

```sql
/*=============================================================================================*/
FORMULA NAME : Compensation Currency Selection Formula
FORMULA TYPE : Compensation Currency Selection
DESCRIPTION: It returns the currency code based on component_id.
=============================================================================================*/

/*--------------- INPUT VALUES DEFAULTS BEGIN -----------------------------------------------*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number)"
DEFAULT FOR CMP_IV_COMPONENT_ID IS 0
l_curr_code = 'XXX'
IF (CMP_IV_COMPONENT_ID = 489) THEN
  l_curr_code = 'USD'
ELSE IF (CMP_IV_COMPONENT_ID = 490) THEN
  l_curr_code = 'GBP'
END IF
RETURN l_curr_code
18 Compensation Budgets

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.
Examples of Budget Groups for Workforce Compensation

Use budget groups to watch worker-level budgets and control spending. These examples show the different ways you can create worker groups and enforce budget rules.

Create Single Column Worker Group and No Budget Limits

Do these steps:
1. In the Summary section, on the Group View tab of the worksheet display, enable Group view.
2. On the Create or Edit Budget Pools dialog box, enable Worker level budgeting.
3. In the Budget Groups section, select a worksheet column to group, such as Country or Location.
4. Leave Enforce budgets by grouping column deselected.

Managers can see the information in the Summary section, Group view of the worksheet. But, they aren't constrained by budget limits.

Create Multiple Column Worker Group and Warn When Crossing Budget Limit

Do these steps:
1. Create a dynamic calculation referencing both the Grade and Country columns using a user-defined text column.
2. In the Summary section, on the Analytic tab of the worksheet display, enable Group view.
3. On the Create or Edit Budget Pools dialog box, enable Worker level budgeting.
4. In the Budget Groups section, select your user-defined worksheet column to group.
5. Select Enforce budgets by grouping column.
6. Enter a maximum percentage over allocation, if appropriate.
7. In Severity When Over Budget, select Warning.

Managers can see the information in the Summary section, Analytic view of the worksheet. They see warnings when they go over budget limits, but they aren't constrained by the limits.

Create Worker Group and Prevent Crossing Budget Limit Using a Formula

Do these steps:
1. On the Configure Column Properties page, in a user-defined text column, select a formula.
2. In the Summary section, Analytic tab of the worksheet display, enable Group view.
3. On the Create or Edit Budget Pools dialog box, enable **Worker level budgeting**.
4. In the Budget Groups section, select your user-defined worksheet column to group.
5. Select **Enforce budgets by grouping column**.
6. Enter a maximum percentage over allocation, if appropriate.
7. In **Severity When Over Budget**, select **Error**.

Managers can see the information in the Summary section, Analytic view of the worksheet. They can’t go over the budget limits.

### Column Limitations

You can’t use these types of columns for grouping:

- Person Number
- Worker Number
- Email
- Worker Name
- Date columns
- Updated By columns
- Performance Management Rating columns
- Numeric columns

Columns that contain lots of text show only the first 150 characters.

### 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.
19 Compensation Components

How Actions and Reasons, Salary Components, and Plan Components Work Together

Salary components and plan components work with actions and reasons to classify compensation transactions. This figure shows how the salary components and plan components work with actions and reasons to classify compensation transactions.
Actions and Reasons in Workforce Compensation

When you set up a workforce compensation plan, you must select an action and optional action reason on the Configure Plan Details page. They’re associated with all salary and assignment records when you transfer data to HR after the cycle is complete. Other HR transactions use the same action framework.

You have one action and ten action reasons to use with workforce compensation plans. You can expand this list to add additional actions and reasons.

The action provided is Allocate Workforce Compensation. Action reasons provided are:

- Anniversary
- Career Progression
- Cost of Living Adjustment
- Market Adjustment
- Mass Adjustment
- Merit
- Outstanding Performance
- Performance
- Periodic Review
- Promotion

Example: You set up a plan where managers allocate only merit increases during the compensation cycle, as follows:

- The action is Allocate Workforce Compensation.
- The action reason is Merit.

The batch process updates salary records after the compensation cycle is over. Now, the Allocate Workforce Compensation action and Merit action reason appears in the worker’s history for that salary record.

Actions and Reasons in Individual Compensation

Individual salary transactions also have an action and optional action reason associated with them. The action and action reason identify the reason for the salary adjustment.

Examples:

- You adjust the salary while promoting a worker or if a worker relocates.
  - The action is Transfer or Relocation.
  - The action reason is the same.
- A compensation or HR specialist adjusts a worker's salary:
  - The action reason is Change Salary.
  - The reason is Adjustment.
Salary Components

You can itemize a worker’s salary record using salary components. These salary components associate an adjustment amount with a specific reason.

The following table shows how a manager might determine a worker’s salary adjustment.

<table>
<thead>
<tr>
<th>Salary Component</th>
<th>Change Percentage</th>
<th>Change Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>5</td>
<td>5,000</td>
</tr>
<tr>
<td>Cost of Living Adjustment</td>
<td>2</td>
<td>2,000</td>
</tr>
<tr>
<td>Promotion</td>
<td>1</td>
<td>1,000</td>
</tr>
<tr>
<td>Total Adjustment</td>
<td>8</td>
<td>8,000</td>
</tr>
</tbody>
</table>

The worker’s salary total salary increase is 8,000 USD and the salary record stores the itemization of that eight percent into the components shown.

The Salary Component lookup type contains some commonly used salary components. You can also add new components to the lookup at any time.

Workforce Compensation Plan Components

When you create workforce compensation plans, you define up to five components that represent compensation awarded in the plan, and indicate whether they represent salary.

Plan components can be:

- The same type of compensation, such as Merit, Cost of Living Adjustment, and Market Adjustment, all of which adjust a worker’s salary.
- Different types of compensation within the same plan, such as Salary, Bonus, and Stock.

Optional Plan Component Mapping to Salary Components

Workforce compensation plan components are informational only. To transfer plan component itemization of salary adjustments to the salary records, you must map the plan components to salary components. Map plan components to salary components using the Element Mapping section on the Configure Column Properties page.

Related Topics

- How Action Components Work Together
- Salary Component Lookups
- Options to Configure the Element Mapping Section
Options to Determine Local Currency

If you have global plans that pay workers in different currencies, specify the method of determining each worker's local currency for each component. Use the Configure Plan Currency page to select the currency from among the following:

- Corporate currency
- Element input currency
- Legal employer currency
- Salary basis currency
- Formula

Local Currency Determination

The following table describes the currency options:

<table>
<thead>
<tr>
<th>Currency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate</td>
<td>The corporate currency defined for the plan determines the local currency.</td>
</tr>
<tr>
<td>Element Input</td>
<td>The input currency of the payroll element mapped to the component determines the local currency.</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>The currency defined by the worker's legal employer determines the local currency.</td>
</tr>
<tr>
<td>Salary Basis</td>
<td>The payroll element associated with the salary basis definition linked to the worker's employment record determines the local currency.</td>
</tr>
<tr>
<td>Formula</td>
<td>A formula you create to retrieve the currency from some other source determines the local currency.</td>
</tr>
</tbody>
</table>

Related Topics

- Overview of Using Formulas
- Formula Type for Compensation Currency Selection

Formula Type for Compensation Currency Selection

The Compensation Currency Selection formula determines the currency associated with a workforce compensation component. You select the formula on the Configure Compensation Components page.
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.

<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_ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Assignment 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_COMPONENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Component 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_EXTRACTION_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Plan Extraction Date</td>
</tr>
</tbody>
</table>
### 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_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_CURR_CODE</td>
<td>Char</td>
<td>N</td>
<td>Currency code from the formula</td>
</tr>
</tbody>
</table>

### Sample Formula

This sample formula determines the currency for a plan based on the component ID.

```sql
/* **********************************************************************************
FORMULA NAME : Compensation Currency Selection Formula
FORMULA TYPE : Compensation Currency Selection
DESCRIPTION: It returns the currency code based on component_id.
**********************************************************************************/

/* ================ INPUT VALUES DEFAULTS BEGIN ========================*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number)
/* ================ INPUT VALUES DEFAULTS ENDS=======================*/

/* ================ FORMULA SECTION BEGIN ========================*/
DEFAULT FOR CMP_IV_COMPONENT_ID IS 0
l_curr_code = 'XXX'
IF (CMP_IV_COMPONENT_ID = 489) THEN
  (l_curr_code = 'USD')
ELSE IF (CMP_IV_COMPONENT_ID = 490 THEN
  (l_curr_code = 'USD')
```
l_curr_code = 'GBP'
) RETURN l_curr_code
/*================ FORMULA SECTION END =======================*/

FAQs

When must I make a component the primary component for budgeting?

When you link more than one component to a single budget pool, you must identify the primary component on the Configure Compensation Components page. When eligibility differs for components, each manager’s total eligible salaries used for budgeting is the eligible salaries of workers who are eligible for the primary component.

How can I configure a plan so that multiple components draw from the same budget pool?

On the Configure Compensation Components page, link all the components to the same budget pool and identify one of the components as the primary component. The primary component determines the population used when budgeting. For example, you have different eligible populations for each component where each component has a different total eligible salary.
Chapter 20
Performance Ratings

How You Configure Performance Ratings in Compensation

If you consider performance ratings when allocating compensation, you can display ratings from Oracle Fusion Performance Management or rate workers during a workforce compensation cycle. Use the Configure Performance Ratings page to enable and configure performance ratings.

You can use performance ratings in the worksheet in the following ways:

• Display Performance Management ratings
• Rate workers within Workforce Compensation
• Use both Performance Management ratings and compensation ratings

Display Performance Management Ratings
If you integrate with Performance Management, you can:

• Display overall and calculated performance ratings given in the Performance Management system
• Provide access to the full performance document from within the worksheet. Select:
  o The performance template (optional) or document name
  o The period to make available
  o Whether to display only completed ratings or ratings in any status
• Update the following in the compensation worksheet:
  o Overall performance rating
  o Overall goal rating
  o Overall competency rating
• Display the Performance Rating History column in the worksheet to see historical ratings given in the Performance Management system

Ratings updated in Performance Management automatically update in the worksheet and vice versa. You can give ratings for the first time in the worksheet as long as you create the performance document in Performance Management.

Rate Workers Within Workforce Compensation
Managers can rate workers as they allocate compensation. You use these ratings only within the current compensation plan and cycle. The ratings don't transfer to the Performance Management system or to HR.

When you set up a plan, you can:

• Select a rating model to use
• Use the Manage Rating Model page to edit an existing rating model or create a new model
• Decide how managers rate performance, either by:
  o Selecting the rating from a list of values
  o Designating the number of stars to represent the worker’s rating
• Display compensation ratings given in the previous plan cycle as a column in the worksheet

Use Both Performance Management Ratings and Compensation Ratings

You can display both Performance Management ratings and compensation ratings in the worksheet. For example, your organization gave Performance Management ratings several months before the compensation cycle starts. You want managers to reassess their worker’s performance to ensure that current performance is consistent with past performance.

You set up the plan to:
• Display the ratings given in the Performance Management system
• Enable managers to give compensation ratings during the compensation cycle as a point of comparison.
• View reports and analytics by both rating types
• Use both rating types as criteria for models

Related Topics
• Rating Models


### Chapter 21

**Workforce Compensation Approvals**

#### 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>
</tbody>
</table>
| Manager must first submit| Lower level managers must submit their worksheets upward for approval before a higher level manager can approve them.  
                             | Ensures that higher managers don't approve worksheets before lower managers have had time to complete them. |
| Disable approvals        | Approvals are not required. Approve and Return for Correction actions are not available. |

#### Submit Mode

Submit mode identifies when managers can submit their worksheets. The following table shows the submit mode and timing.
### Mode | Timing
--- | ---
Submit anytime | Managers can submit their worksheets at any time during the period the worksheet is available to them.
All managers must be approved | Lower level managers must have their worksheets approved before a higher level manager can submit his own worksheet for approval. Ensures that higher managers review and approve allocations of lower managers before submitting allocations for their entire organization for approval.
Disable submit | Managers can only save their worksheets. The Submit action is not available.

### 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.

### Examples of Creating Alternate Approver Hierarchies
The following scenarios illustrate how you can create different alternate approvers using the Configure Approvals page in the Manage Plans task.

The scenarios are:

- Alternate approver is the final approver
- Alternate approver precedes the final approver
- Alternate approver is in the middle of the standard hierarchy

If you change an alternate approver hierarchy, you must refresh the manager hierarchy for those changes to take effect.

### Alternate Approver is the Final Approver
Carlos, the CEO, is the top manager in the hierarchy. After he approves all worksheets below him and submits his worksheet for approval, it goes to HR for final approval. The following table shows how you build the alternate approver table:
This figure shows that Maria is the final approver of Carlos's worksheet. When Carlos submits his worksheet for approval, Maria is notified. Carlos's worksheet status is **In Approvals** until Maria approves it and it becomes fully approved.

### Alternate Approver Precedes the Final Approver

Carlos, the CEO, does not participate in the compensation approval process of his organization for managers under Sara. When Sara submits her worksheet, it goes to HR for final approval. The following table shows how you build the alternate approver table:

<table>
<thead>
<tr>
<th>Primary Worksheet Manager</th>
<th>Approval Sequence</th>
<th>Alternate Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sara</td>
<td>1</td>
<td>Maria</td>
</tr>
</tbody>
</table>

[Diagram showing the approval process]
This figure shows that Maria is an intermediate approver of Sara’s worksheet.

The approval flow is:

1. Maria is notified when Sara submits her worksheet for approval.
2. Maria approves Sara’s worksheet. Sara and all lower managers’ worksheets statuses are now In Approval.
3. Carlos sees that Maria approved Sara’s worksheet.
4. If Sara is eligible for compensation, Carlos allocates an amount to her and saves his worksheet.
5. Carlos must approve all the worksheet for Sara and her lower managers for them to be fully approved.

### Alternate Approver is in the Middle of the Standard Hierarchy

John reports to Vijay based on the plan hierarchy. However, John’s entire team did a special project for Lakshmi during most of the past year. Sara wants Lakshmi to review and approve the compensation for John’s team rather than Vijay. The following table shows how you build the alternate approver table:

<table>
<thead>
<tr>
<th>Primary Worksheet Manager</th>
<th>Approval Sequence</th>
<th>Alternate Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>1</td>
<td>Lakshmi</td>
</tr>
</tbody>
</table>
This figure shows that Lakshmi approves John's worksheet and the rest of the approvals occur within the standard hierarchy.

The approval flow is:

1. Lakshmi is notified when John submits his worksheet for approval.
2. From the notification, Lakshmi approves or rejects the worksheet. She can open the workforce compensation work area from the notification, select John from the manager list at the top of the page, and review the details of John's worksheet. However, she can't approve or reject John's worksheet from the worksheet.
3. Vijay sees that Lakshmi approved John's worksheet by looking at his own worksheet. In the detail table, John's worksheet status is **In Approvals**.
4. Vijay is now able to submit his worksheet to progress the approval process. Vijay, Sara, and Carlos are still able to update compensation for workers on John's team even after Lakshmi approves John's worksheet.

**Note:** If Lakshmi is not a line manager with security access to the workforce compensation work area, she requires the Compensation Approver job role to be able to review John's worksheet details.

**FAQs**
Can I configure workflow in workforce compensation to route my worksheet for approval?

No. Workforce compensation uses the hierarchy created to build the worksheets to route approvals to the highest level manager. You can't create user-defined approval routes for worksheets. However, you can create alternate approval hierarchies for individual managers during setup using the Configure Alternative Approvers page.

What's the difference between primary worksheet manager and alternate approver?

A primary worksheet manager is the worksheet owner responsible for allocating compensation to eligible workers, commonly the supervisor of the workers who appear on the worksheet.

An alternate approver is a person defined as an approver of a worksheet. The person may not be part of the standard hierarchy or may be in a different position than in the standard approval hierarchy. The hierarchy type defined for the plan builds the standard approval hierarchy. You configure the alternate approvers on the Configure Alternate Approvers page.

Can I change an alternate hierarchy?

Yes. You can change the hierarchy of an already defined alternate approver on the Configure Alternate Approvers page without running the refresh process. You must refresh the data after the start compensation cycle process runs when you:

- Add an additional alternate approver for a new person
- Delete an alternate approver for an existing person
22 Compensation Change Statements

Ways to Generate and Deliver Worker Statements

When you set up your workforce compensation plan, you can specify how to generate and deliver worker statements. You select the Statement Delivery option on the Configure Compensation Change Statements page. Administrators manage the statements generated by both of the methods described in these sections in the Compensation work area using the Administer Workers task.

Printed and Delivered by Managers
Managers generate the statements using the Communicate worksheet task in the Workforce Compensation work area. The statements are automatically available to managers or administrators, but not workers. You can enable managers to combine multiple statements into one file when they generate the statements.

Centrally Managed and Stored
The Process Workforce Compensation Change Statements process generates individual statements for each worker. Workers can see their statements using the Compensation task in the Personal Information work area. The administrator sets the statement visibility when submitting the process.

FAQs

What's a worker statement action?
When you configure workforce compensation statements you can opt to have workers indicate that they accept or decline their statements. Agree, acknowledge, and sign electronically are functionally the same as accept. You select the worker actions on the Configure Compensation Change Statements task, Manage Statement Groups page.

What's the difference between workforce compensation statements and total compensation statements?
Workforce compensation statements show recent changes to base and variable pay. They consist of statement groups composed of RTF statement templates. The content of the change statements is based on the associated workforce compensation plan. Create these statements using the Configure Compensation Change Statements task in the Compensation work area when you set up a workforce compensation plan.

Total compensation statements show base and variable pay, fringe benefits, and prerequisites for a specified period of time, typically a year. They consist of statement definitions composed of items and categories. The total compensation statement is available both online and in PDF format. Create these statements using the Total Compensation Statement tasks in the Compensation work area.
Overview of Worksheet Task Types

Task types control the display of information on the worksheet, which consists of one or more pages. The information on each page varies by the type of task. You can define up to 10 pages for each worksheet when you configure the worksheet display. Commonly used default columns for each task type make implementation easier.

Use the Configure Worksheet Display page to enable tasks and use the Configure Worksheet Page Layout page to configure them.

Task Types

When you set up the plan, you enable the tasks that correspond to what managers do during the compensation cycle. The following table shows the worksheet task types and how they are used:

<table>
<thead>
<tr>
<th>Task Type</th>
<th>How They Are Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation</td>
<td>Manage and allocate compensation.</td>
</tr>
<tr>
<td>Approvals</td>
<td>View the status of lower manager's worksheets, approve or reject submitted worksheets, or request additional information.</td>
</tr>
<tr>
<td>Communicate</td>
<td>Generate compensation statements for workers to notify them of their new or adjusted compensation, performance rating, or promotion.</td>
</tr>
<tr>
<td>Performance</td>
<td>Give new performance ratings, or view existing performance ratings given either during a previous workforce compensation cycle or in Oracle Fusion Performance Management.</td>
</tr>
<tr>
<td>Promotions</td>
<td>View and update the job, grade, or position.</td>
</tr>
<tr>
<td>Detail table only</td>
<td>Display only the detail table without any summary information.</td>
</tr>
</tbody>
</table>

You can combine some tasks into a single page:

- Give performance ratings and promotions on the compensation task page
- Make compensation allocations on the performance and promotion task page

You must enable and configure at least one task type if you want managers to access their worksheets. Also, if your plan requires approvals you must enable and configure an Approvals task type.
Summary Sections
The compensation, performance, and promotions task types have summary tables and graphs specific to the focus of the task. The summary sections display:

- Compensation: Up to five components displaying six analytics
- Performance: Up to six columns and an optional graphic
- Promotion: Up to ten subordinate tabs

Detail Tables
You can display the same set of columns in the details section of any task type, except for the approvals and communicate task types. The following table shows the detail table column groups and the type of information displayed.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Information Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>Worker personal information such as name, email, assignment manager and country.</td>
</tr>
<tr>
<td>Alerts</td>
<td>Alerts to notify managers of situations that need attention.</td>
</tr>
<tr>
<td>Employment</td>
<td>Assignment or employment term details, such as hire date, work location, working hours, manager name, job, grade, and person number.</td>
</tr>
<tr>
<td>Salary Information</td>
<td>Base pay information, such as the current salary, annualized full-time salary, current comparatio, current quartile.</td>
</tr>
<tr>
<td>Component 1 through 5</td>
<td>Information that's specific to a component, such as eligible salary, compensation amount, percentage of eligible salary, units, target amounts, and effective date. You can configure up to five components for a plan. The same set of columns is available for each component.</td>
</tr>
<tr>
<td>Promotion</td>
<td>Information related to job, grade, or position changes given during the compensation cycle, such as new job, new grade, new position, new salary range minimum, midpoint, and maximum, and promotion effective date.</td>
</tr>
<tr>
<td>Performance</td>
<td>Performance ratings given in Oracle Fusion Performance Management or during the current or previous compensation cycle. Information can include overall performance rating, calculated goal rating, worker potential, and risk of loss.</td>
</tr>
<tr>
<td>User-Defined Columns</td>
<td>Any type of information you can configure. Use columns 1-15 to display text. Use 16-45 to display numeric data. Use columns 46-50 to create user-defined lists from which managers can select a value.</td>
</tr>
</tbody>
</table>
How You Configure the Compensation Task Type Layout

Managers use the compensation task page on the workforce compensation worksheet to manage and allocate compensation. It contains a summary table that displays high-level information about each component in the plan and a detail table. Select up to five components that you want to appear in the summary table. You can create different compensation tasks on which managers can focus on awarding different types of compensation.

Use the Configure Worksheet Display page to enable the task and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area.

For each component in the plan, the summary section can display:

- Worker Population
- Allocation Statistics
- Salary Statistics
- Workers on Target
- Pay for Performance
- Alert Summary

You can expand the summary section for each component to view analytics that provide a snapshot of allocations in the current cycle.

Summing Component Data

You can also sum the data for components selected to appear in the summary section.

1. Select the components you want to appear in the summary table.
2. Select to sum the data for all selected components within the plan in the summary table.

If the components use different units of measure the totals are inaccurate.

How You Configure the Approvals Task Type Layout

The approvals task page on the workforce compensation worksheet is included in the worksheets only for managers with at least one lower-level manager. Higher-level managers use it to view the status of lower manager’s worksheets, approve or reject submitted worksheets, or request additional information.

Use the Configure Worksheet Display page to enable the task and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area. You can enable up to seven subtabs that display summarized information for each lower manager. When a column contains the number of workers or a percentage, you can drill down to see details about the workers.

The following table describes the subtabs and what they display.
<table>
<thead>
<tr>
<th>Subtab</th>
<th>Information Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approvals</td>
<td>All lower-level managers and the status of their worksheets. This subtab is always enabled when the approvals task is enabled.</td>
</tr>
<tr>
<td>Compensation Overview</td>
<td>Number of workers awarded compensation during the cycle, the total amount allocated, and the total available budget.</td>
</tr>
<tr>
<td>Allocation Statistics</td>
<td>Five second-level subtabs displaying average allocation, allocation spread, as well as allocations by overall performance rating, compensation performance rating, and country.</td>
</tr>
<tr>
<td>Salary Analysis</td>
<td>Six second-level subtabs displaying averages by salary, compa-ratio, salary range position, quartile, quintile, and total salary.</td>
</tr>
<tr>
<td>Target Analysis</td>
<td>Three second-level subtabs displaying allocations compared to defined targets and target ranges.</td>
</tr>
<tr>
<td>Promotions</td>
<td>Number of workers whose job, grade, or position changed during the compensation cycle.</td>
</tr>
<tr>
<td>Performance</td>
<td>Seven second-level subtabs displaying allocations by overall ratings, goal ratings, competency ratings, as well as calculated ratings.</td>
</tr>
<tr>
<td>Alerts</td>
<td>Shows all the current alerts and enables managers to view the affected workers.</td>
</tr>
</tbody>
</table>

How You Configure the Performance Task Type Layout

Managers can use the performance task page on the workforce compensation worksheet to give or view performance ratings. They give ratings either during a workforce compensation cycle or in Oracle Fusion Performance Management. Use the Configure Worksheet Display page to enable the task and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area.

The performance summary section displays the number and percentage of workers for each rating. If you define a target distribution for the rating model you use, it displays that as well. The summary columns are:

- Actual Percentage
- Performance Rating
- Target Compensation Percentage
- Target Compensation Percentage Maximum
- Target Compensation Percentage Minimum
- Workers with Compensation
How You Configure the Promotions Task Layout

Managers can use the performance task page on the workforce compensation worksheet to view and update the job, grade, or position. Use the Configure Worksheet Display page to enable the task and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area.

The promotions summary section displays information within ten subtabs:

- By Team
- By Country
- By Business Unit
- By Department
- By Proposed Job
- By Years in Job
- By Performance Management Rating
- By Compensation Performance Rating
- By User-Defined Text Column 1
- Organizational Averages

How You Configure the Detail Table Only Task Layout

The detail table task page on the workforce compensation worksheet displays only the detail table without any summary information. Use it when summarized information isn't appropriate.

Use the Configure Worksheet Display page to enable the task and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area. For example, you set up a plan to capture information from managers or distribute data to managers where you don't allocate compensation, use performance ratings, and give promotions.

Examples of Worksheet Task Type Configurations

You can use different worksheet task types to display a variety of information and for different business purposes. The following scenarios illustrate how you can use the task types to design different compensation plans.

Using Two Compensation Tasks to Allocate Merit and Stock Awards

Scenario: You want managers to allocate merit compensation and award stock in different task pages.
Follow these steps:

1. Create a plan that enables managers to award merit adjustments and stock during the same compensation cycle.
2. Enable two compensation type tasks, labeling the first Merit Adjustments and the other Stock Awards.
3. In the Merit Adjustments task, enable:
   a. Columns with information that managers require to make informed salary decisions. Examples: current base pay, eligible salary, current and new compa-ratio, quartile, salary range low, and salary range high.
   b. The merit adjustment amount column so managers can enter adjustment amounts.
4. In the Stock Awards task, enable the stock amount column.
5. In the summary table of each task, set the corresponding component to only display.

The rolled-up merit information appears in the Merit Adjustments task page and the rolled-up stock details appear in the Stock Awards task page.

### Using One Compensation Task to Allocate Merit and Bonus Awards, View Performance Ratings, and Promote

Scenario: You want managers to allocate compensation, award bonuses, view performance ratings, and promote workers in one task page.

Follow these steps:

1. Create a plan that enables managers to award merit adjustments and bonuses, as well as promote workers, during the same compensation cycle.
2. Enable one compensation task, labeling it Compensation Awards.
3. In this task, enable:
   a. Columns with information that managers require to make informed salary decisions. Examples: current base pay, eligible salary, current and new compa-ratio, quartile, salary range low, salary range high, and performance rating.
   b. The merit adjustment amount and bonus amount columns so managers can enter amounts.
   c. The job, new job, grade, and new grade columns so that managers can see their workers' current jobs and grades and promote workers to a new job or grade.

The summary table will include rolled up information about both the merit and bonus award.

### Using the Performance Task, Promotion Task, And Compensation Task to Rate Performance, Promote, and Allocate Merit

Scenario: You want managers to rate performance, promote workers, and allocate compensation on individual task pages.

Follow these steps:

1. Create a plan that enables managers to rate worker performance, promote workers, and award merit increases during the same compensation cycle.
2. Enable and label three tasks as follows:
   a. Performance task, labeling it Rate Performance.
   b. Promotions task, labeling it Promote Workers.
   c. Compensation task, labeling it Allocate Compensation.

3. In the Rate Performance task, enable:
   a. Columns related to a worker's performance. Examples: length of service, job, grade, last rating date, last rating.
   b. The performance rating column.

4. In the Promote Workers task, enable columns that help managers promote workers. Examples: time in grade, time in job, performance rating, potential, current job, current grade, current position, new job, new grade, and new position.

5. Configure summary subtabs related to team, proposed job, performance, and organizational averages.

6. In the Allocate Compensation task enable:
   a. Columns with information that managers require to make informed salary decisions. Examples: eligible salary, current base salary, new base salary, current and new compa-ratio, quartile, salary range low, and salary range high.
   b. The merit adjustment amount and merit adjustment percentage columns so that managers can enter amounts and percentages.

Performance ratings that you enter during a compensation cycle are used only within the compensation process and are not used outside the compensation tool.

### Plan Setup Dependencies

Enable features and select worksheet actions when you set up a workforce compensation plan. Some of these decisions have dependent configuration requirements. Use the Manage Plans task in the Compensation work area.

### Task Dependencies

The following table lists the workforce compensation plan task that you enable and the corresponding dependency, along with the workforce compensation pages for the selections.

<table>
<thead>
<tr>
<th>Task and Page</th>
<th>Dependent Selection and Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Oracle Performance Management (Configure Performance Ratings)</td>
<td>Enable at least one performance management rating column (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable Compensation Management Ratings (Configure Performance Ratings)</td>
<td>Enable at least one compensation performance column (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable compensation components (Configure Compensation Components)</td>
<td>Configure related components (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Task and Page</td>
<td>Dependent Selection and Page</td>
</tr>
<tr>
<td>----------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enable an alert (Configure Alerts)</td>
<td>Enable Alert column (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable compensation change statements (Configure Compensation Change Statements)</td>
<td>Enable the Communications tab type (Configure Worksheet Page Layout)</td>
</tr>
<tr>
<td>Enable compensation type tab (Configure Worksheet Display)</td>
<td>Enable Components and create at least one component (Configure Compensation Components)</td>
</tr>
<tr>
<td>Enable a column that adjusts salary (Configure Worksheet Page Layout: Detail Table tab)</td>
<td>Enable at least one component to be posted as salary (Configure Worksheet Page Layout: Detail Table tab, Configure Column Properties page, Element Mapping section)</td>
</tr>
<tr>
<td>Enable budgeting and create a budget pool (Configure Budget Pools)</td>
<td>Enable components and create a component linked to the budget pool (Configure Compensation Components)</td>
</tr>
</tbody>
</table>

**Action Menu Dependencies**

When you configure the worksheet page layout for a plan, you select the actions that managers can take on the worksheet. Some of the actions require selections on other workforce compensation pages as shown in the following table.

<table>
<thead>
<tr>
<th>Action on the Configure Worksheet Page Layout: Actions Menu Tab</th>
<th>Dependent Selection and Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable ranking actions</td>
<td>Enable rank column (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable view compensation history action</td>
<td>Enable compensation history column (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable view notes action</td>
<td>Enable notes column (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable apply targets action</td>
<td>Enable the target column for at least one component (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable targets action</td>
<td>Enable and configure the target column for at least one component (Configure Worksheet Page Layout: Detail Table tab)</td>
</tr>
<tr>
<td>Enable hide ineligible workers action</td>
<td>Configure eligibility task (Configure Plan Eligibility)</td>
</tr>
<tr>
<td></td>
<td>Add a eligibility profiles to any component (Configure Worksheet Page Layout: Detail Table tab, Configure Column Properties dialog box)</td>
</tr>
</tbody>
</table>
## Guidelines to Allocate Compensation As Percentage of Budget

You can allocate compensation as a percentage of the budget pool, rather than allocating compensation as a percentage of eligible salary or a flat amount. If you allocate compensation as a percentage of a budget pool, you must:

- Disable the eligible salary column for the component linked to the budget pool
- Disable modeling allocation methods that use eligible salary
- Understand how rounding rules can affect summary values

### Eligible Salary Columns and Allocation Method

The eligible salary columns and allocation method are enabled by default. If you enable the Percentage of Budget column for any component, you must disable the following:

- **Percentage of Eligible Salary** columns on the **Detail Table** tab for any given component
- **Total Eligible Salaries** and **Percentage of Total Eligible Salaries** columns on the **Summary** tab
- **n Percentage of Eligible Salary** allocation method, if you use modeling.

### Rounding Rules

The rounding rule set for the corresponding Component Amount column affects the amount calculated for the Percentage of Budget column.

Example: The following table shows the calculations when:

- Overall budget = 900 USD
- Rounding rule set for the Component Amount column = Round to the nearest 10
- Managers enter 4 in the Percentage of Budget column.

<table>
<thead>
<tr>
<th>Column</th>
<th>Calculated Amount</th>
<th>Amount After Rounding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Component Amount</td>
<td>$(4 / 100) * 900 = 36$</td>
<td>40</td>
</tr>
</tbody>
</table>
When the percentage of budget calculation uses the rounded amount, the result is different than without the rounding, as shown in this table.

<table>
<thead>
<tr>
<th>Column</th>
<th>With Rounding</th>
<th>Without Rounding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of Budget</td>
<td>40 / 900 = 4.44</td>
<td>36 / 900 = 4</td>
</tr>
</tbody>
</table>

Examples of Budget Groups for Workforce Compensation

Use budget groups to watch worker-level budgets and control spending. These examples show the different ways you can create worker groups and enforce budget rules.

Create Single Column Worker Group and No Budget Limits

Do these steps:

1. In the Summary section, on the Group View tab of the worksheet display, enable **Group view**.
2. On the Create or Edit Budget Pools dialog box, enable **Worker level budgeting**.
3. In the Budget Groups section, select a worksheet column to group, such as **Country** or **Location**.
4. Leave **Enforce budgets by grouping column** deselected.

Managers can see the information in the Summary section, Group view of the worksheet. But, they aren't constrained by budget limits.

Create Multiple Column Worker Group and Warn When Crossing Budget Limit

Do these steps:

1. Create a dynamic calculation referencing both the **Grade** and **Country** columns using a user-defined text column.
2. In the Summary section, on the Analytic tab of the worksheet display, enable **Group view**.
3. On the Create or Edit Budget Pools dialog box, enable **Worker level budgeting**.
4. In the Budget Groups section, select your user-defined worksheet column to group.
5. Select **Enforce budgets by grouping column**.
6. Enter a maximum percentage over allocation, if appropriate.
7. In **Severity When Over Budget**, select **Warning**.

Managers can see the information in the Summary section, Analytic view of the worksheet. They see warnings when they go over budget limits, but they aren't constrained by the limits.
Create Worker Group and Prevent Crossing Budget Limit Using a Formula

Do these steps:

1. On the Configure Column Properties page, in a user-defined text column, select a formula.
2. In the Summary section, Analytic tab of the worksheet display, enable Group view.
3. On the Create or Edit Budget Pools dialog box, enable Worker level budgeting.
4. In the Budget Groups section, select your user-defined worksheet column to group.
5. Select Enforce budgets by grouping column.
6. Enter a maximum percentage over allocation, if appropriate.
7. In Severity When Over Budget, select Error.

Managers can see the information in the Summary section, Analytic view of the worksheet. They can't go over the budget limits.

Column Limitations

You can't use these types of columns for grouping:

- Person Number
- Worker Number
- Email
- Worker Name
- Date columns
- Updated By columns
- Performance Management Rating columns
- Numeric columns

Columns that contain lots of text show only the first 150 characters.

Static Worksheet Summary Columns

When managers filter their worksheets, the data in the summary section change to reflect the filtering criteria. You can enable three summary columns to remain static when managers apply the filters. Three related columns show the filtered data. You enable the columns on the on the Configure Worksheet Page Layout page, Summary Columns tab for a compensation task type.

The following table shows the static and filtered columns.
Example: You enable the **Overall Budget** summary column when you configure a worksheet. The **Budget -Filtered by Team** column is enabled by default. A manager changes the **Team** filter on his worksheet to one lower-level manager. In the **Summary** section, the **Overall Budget** column shows the budget amount for all his reports. The **Budget -Filtered by Team** column shows the budget amount for the filtered lower-level manager.

### 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.
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>

How the Ranking Score is Calculated

The ranking score is a calculated value from 0 to 100 for each worker who has at least one ranking. It considers the rankings of all managers who ranked the worker, who is in the viewing manager's organization.
Conditions That Affect the Ranking Score

The following conditions affect the ranking score:

- The ranking given by each manager. The rankings of higher-level managers have more weight because the ranking compares the worker against a larger population of workers.
- The viewer's position in the hierarchy
- The number of other workers ranked

How the Ranking Score Is Calculated

This formula derives the ranking score:

\[
100 \times \frac{\sum (\text{Group Population} - \text{Ranking} + 1)}{\sum \text{Group Population}}
\]

The following table describes the variables in the equation:

<table>
<thead>
<tr>
<th>Equation Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Population</td>
<td>Includes all ranked workers reporting directly or indirectly to the manager viewing the score. The group population must include at least 10 workers for &lt;name of application or process&gt; to calculate a score.</td>
</tr>
<tr>
<td>Ranking</td>
<td>The position value given to a worker; it must be a positive, whole number from 1 to N.</td>
</tr>
<tr>
<td>1</td>
<td>Added to the numerator to ensure that workers ranked 1 by all managers receive a score of 100.</td>
</tr>
<tr>
<td>(Group Population - Ranking + 1)</td>
<td>Summed for the manager looking at the score and all lower managers who ranked the worker.</td>
</tr>
</tbody>
</table>

The scores are whole numbers only.

Example 1

John views the rankings for a worker who reports directly to Peter. John ranked the worker 299 out of 2200 and Peter ranked the worker 1 out of his 7 workers ranked.

<table>
<thead>
<tr>
<th>Manager</th>
<th>Worker's Ranking</th>
<th>Workers Ranked</th>
<th>Group Population - Ranking + 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>299</td>
<td>2200</td>
<td>1902</td>
</tr>
</tbody>
</table>
### Example 1

The ranking score of the worker John views is 86.
Calculation: \((100 \times 2534) / 2923\).

### Example 2

Nancy views the same worker as John, in example 1.

<table>
<thead>
<tr>
<th>Manager</th>
<th>Worker's Ranking</th>
<th>Workers Ranked</th>
<th>Group Population - Ranking + 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nancy</td>
<td>4</td>
<td>26</td>
<td>23</td>
</tr>
<tr>
<td>Peter</td>
<td>1</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Sum</td>
<td>not applicable</td>
<td>33</td>
<td>30</td>
</tr>
</tbody>
</table>

The ranking score of the worker Nancy views changes to 91.
Calculation: \((100 \times 30) / 33\).

### Example 3

Nancy views the same worker, with the same ranking as in the previous examples. However, she views a smaller number of workers ranked in her organization.

<table>
<thead>
<tr>
<th>Manager</th>
<th>Worker's Ranking</th>
<th>Workers Ranked</th>
<th>Group Population - Ranking + 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nancy</td>
<td>4</td>
<td>10</td>
<td>7</td>
</tr>
</tbody>
</table>
The ranking score of that worker Nancy views is now 82.

Calculation: \((100 \times 14) / 17\).

**Ranking Scores and Their Relation to Worker Population**

The worker's ranking score is 82 in the smaller organization (example 3) and 91 in the larger organization (example 2). These examples illustrate that the same ranking results in a higher ranking score when the higher level manager has a larger population of workers ranked.

**Dynamic Calculations in Compensation Plans**

Dynamic calculations are conditional statements or expressions. Use them to calculate and display values that vary by worker or to change the value of one column based on the value of another.

You build a condition by selecting worksheet columns, operators, and values, or by manually creating the condition using the Manage Dynamic Column page. When you use the Basic tab, the application guides you through the creation of conditions or column results. Alternatively, you can create expressions free-hand using the Advanced tab.

When a column’s information source is outside of the compensation plan, the data might be out-of-sync until you run the refresh process or update the worksheet data. For example, dynamic columns that depend on the Performance Management Overall Rating might not show the actual performance rating until after you run the refresh process.

The aspects of dynamic calculations are:

- Evaluation order
- Triggering events
- Sequence number
- Default expression

**Evaluation Order**

The evaluation order identifies the calculation order of multiple dynamic columns when the condition or results of one column uses the results of another. For example, you define a **Total Cash Compensation** column that displays the sum of an automatically calculated cost of living adjustment **COLA** and a manager-entered merit adjustment.

1. Define a dynamic column for the COLA adjustment for all workers that varies the adjustment by each worker’s location and grade.
2. Give this dynamic expression an evaluation order of 1.
3. Give the **Total Cash Compensation** column an evaluation order of 2.
The application evaluates the COLA adjustment first and then uses that amount to display the **Total Cash Compensation** for each worker.

### Triggering Events
Triggering events are actions that determine when to evaluate the dynamic calculations. The following table shows the events that trigger evaluation or recalculation of dynamic columns:

<table>
<thead>
<tr>
<th>Triggering Event</th>
<th>Description and Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start compensation cycle</td>
<td>Running the Start Compensation Cycle process evaluates the column conditions and calculates the results. Example: You might select this trigger to calculate eligible salaries used during the cycle.</td>
</tr>
<tr>
<td>Refresh data</td>
<td>Running the Refresh Data process reevaluates all dynamic calculations, fast formulas, or HR data used in dynamic calculations.</td>
</tr>
<tr>
<td>Change worksheet data</td>
<td>Entering or changing data on the worksheet and tabbing out of the cell reevaluates the condition and corresponding results. This trigger might slow the application performance. Use it only for column results that depend on data that change in the worksheet.</td>
</tr>
</tbody>
</table>

### Sequence Number
Sequence numbers identify the calculation order for conditions. Configure conditions that cover the most workers with the highest sequence numbers to reduce the impact to worksheet and batch process performance. Test a few dynamic calculations at a time to assess the impact on application performance and decide what level of performance impact you can accept.

### Default Expression
The default expression is the one to use when no other conditions are met. The application evaluates every condition in sequence order. The default expression must be the highest sequence number because it applies only after evaluation of all other conditions. If you don’t select a default expression and no conditions are met, the column displays no values.

### Examples of Dynamic Calculations
Use these scenarios to understand how to use dynamic calculations to calculate and display a value or change the value of one column based on the value of another.
Using Dynamic Calculations to Define Eligible Salary

You’re setting up the annual compensation plan. You want to base the bonus eligible salary on the current annual salary. Using dynamic calculations, you create an expression that moves the current annual salary amount into the **Bonus Eligible Salary** column when you start the compensation cycle.

Using Dynamic Calculations to Define Targets

As part of the annual bonus review you want to display bonus target amounts on the worksheet for managers to consider during allocations. Your company uses performance ratings and you want to use the ratings as the basis for the targets. Using dynamic calculations, you create expressions that vary the **Bonus Target Amount** by performance ratings. For example, if performance rating is **Outstanding**, then **Bonus Target Amount** equals 10 percent of **Bonus Eligible Salary**.

Using One Column's Results in Another Expression

At your company managers can rate workers performance as part of the annual compensation cycle. As you set up the compensation plan you want to make sure that managers use performance ratings as a basis for determining salary increase targets. For example, the target for high performers is 10 percent of eligible salary and the target for average performers is 5 percent of eligible salary.

Using dynamic calculations, you:

1. Create an expression for the **Merit Eligible Salary**.
2. Give it an **Evaluation Order** of 1.
3. Create another expression that defines the **Target Compensation Percentage** as a percentage of **Merit Eligible Salary** for each different performance rating.

The application evaluates the **Merit Eligible Salary** first, and then uses it to calculate the **Target Compensation Percentage**.

*Related Topics*

- Guidelines to Configure the Eligible Salary Column

Create a Dynamic Calculation

This example demonstrates how to create a dynamic column for an annual workforce compensation bonus plan that rewards high performing workers.

The following table summarizes key decisions for this scenario.
### Decisions to Consider

<table>
<thead>
<tr>
<th>What events do you want to trigger the calculation?</th>
<th>Start Compensation Cycle and Refresh Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>What conditions do you want evaluated?</td>
<td>Performance Rating of 5 (Outstanding) and 4 (Exceeds Expectations)</td>
</tr>
<tr>
<td>Which column on the worksheet do you want to dynamically calculate?</td>
<td>Compensation Amount column for the Bonus component</td>
</tr>
<tr>
<td>What results do you want to see for the dynamic column?</td>
<td>A bonus of ten percent of annual salary for workers with a rating of 5. A bonus of five percent of annual salary for workers with a rating of 4. All others receive 0</td>
</tr>
</tbody>
</table>

### Task Summary

To create this dynamic calculation for the Compensation Amount column for the Bonus component, complete the following tasks. Use the default values except where otherwise indicated.

1. Create the dynamic calculation.
2. Build the first expression to identify and reward the highest performers.
3. Build the second expression to identify and reward the high performers.
4. Build the third expression to identify and not reward all other performers.
5. Test the dynamic calculation.

### Prerequisites

1. Create a workforce compensation plan.
2. Enable the Compensation Amount column for the Bonus component.
3. Enable performance ratings.
4. Set up a rating scale from 1 to 5, where 5 equals Outstanding and 4 equals Exceeds Expectations.

### Creating the Dynamic Calculation

1. On the Define Workforce Compensation page, Configure Worksheet Display row, click Go to Task.
2. On the compensate type tab row, click Configure.
3. In the Detail Table tab, click the Dynamic Columns button for the Compensation Amount column.
4. Select Start compensation cycle and Refresh data triggering events.
5. Click the Add button to create the first expression.
6. Enter 1 for the Sequence.
7. Click the Create or Edit Expression button for the Condition.
Building the First Expression

This expression identifies workers with a performance rating of 5 and awards them a bonus that is 10 percent of their annual full-time salary.

1. Click **Build Condition**.
2. In the Basic tab, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Performance Rating</td>
</tr>
<tr>
<td>Operation</td>
<td>Contains</td>
</tr>
<tr>
<td>Fixed Value</td>
<td>5</td>
</tr>
</tbody>
</table>

3. Click **Done**.
4. Click **Validate**. This step is optional.
5. Click **OK** in the confirmation.
6. Click **Apply**.
7. Click the **Create or Edit Expression** button for **Column Results** for the expression you just created.
8. In the Basic tab, select **Equation**.
9. Click **Switch to Column**.
10. Complete the fields as shown in this table. Click **Next** between steps.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Annualized Full-Time Salary - Current</td>
</tr>
<tr>
<td>Operation</td>
<td>Multiplied by</td>
</tr>
<tr>
<td>Fixed Value</td>
<td>0.1</td>
</tr>
</tbody>
</table>

11. Click **Done**.
12. Click **Apply**.

Building the Second Expression

This expression identifies workers with a performance rating of 4 and awards them a bonus that is 5 percent of their annual full-time salary.

1. Click **Add** button to create the second expression.
2. Enter 2 for the **Sequence**.
3. Click the **Create or Edit Expression** button for the **Condition**.
4. Click **Build Condition**.
5. In the Basic tab, complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Performance Rating</td>
</tr>
<tr>
<td>Operation</td>
<td>Contains</td>
</tr>
<tr>
<td>Fixed Value</td>
<td>4</td>
</tr>
</tbody>
</table>

6. Click **Done**.
7. Click **Apply**.
8. Click the **Create or Edit Expression** button for **Column Results** for the expression you just created.
9. In the Basic tab, select **Equation**.
10. Click **Switch to Column**.
11. Complete the fields as shown in this table. Click **Next** between steps.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Annualized Full-Time Salary - Current</td>
</tr>
<tr>
<td>Operation</td>
<td>Multiplied by</td>
</tr>
<tr>
<td>Fixed Value</td>
<td>0.05</td>
</tr>
</tbody>
</table>

12. Click **Done**.
13. Click **Apply**.

**Building the Third Expression**

This expression identifies workers with a performance rating that is less than 4 and doesn't award them any bonus.

1. Click the **Add** button to create the third expression.
2. Enter 3 for the **Sequence**.
3. Select **Default**.
4. Click the **Create or Edit Expression** button for **Column Result** for the expression you just created.
5. In the Basic tab, enter 0 as the **Fixed Value**.
6. Click **Done**.
7. Click **Apply**.
Testing the Dynamic Calculation

1. Click the **Test Condition and Column Results** button.
2. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Rating</td>
<td>5</td>
</tr>
<tr>
<td>Annualized Full-Time Salary - Current</td>
<td>50000</td>
</tr>
</tbody>
</table>

3. Click **Test**.
4. Verify that the results are as expected and click **OK**.

FAQs

**How can I store user-defined data to use as default worksheet column values?**

Scenario: You have user-defined data such as scores, ratings, incentive plan, target percentages, and special earning calculator values stored in your HR application. You want to use this data to calculate bonuses, targets, group workers for compensation purposes, and so on.

Use tasks in the Define Elements, Balances, and Formulas task list in the Setup and Maintenance work area to:

1. Create a single payroll element with many input values and label these input values according to the data you want to load.
2. Load the worker-level data into element entries.
3. Write fast formulas to display each element input value as a default value in a worksheet column.

**What happens if I select Value Remains Unchanged when I configure a column's properties?**

The percentages stored in the following columns remain static and don't change even when the corresponding amount related to eligible salary or budget pool changes.

- Compensation Percentage of Eligible Salary
- Compensation Percentage Maximum
- Compensation Percentage Minimum
- Target Percentage
Why are some columns already enabled in my new task?

Each task type includes commonly used columns enabled by default. You can deselect the columns if you don't want them to appear on the worksheet. Deselect the columns on the Configure Worksheet Page Layout page.

What's the difference between Basic and Advanced tabs in the Edit or Create Condition Rules dialog box?

The Basic tab takes you through a sequence of steps to create a condition and places the columns and operators in the correct position of the expression.

On the Advanced tab, you can use the series of steps to create an expression. You can also:

- Manually edit a condition by placing the cursor where you want to insert a column or operator
- Create a condition by typing the names of columns and operators

Open the Edit or Create Condition Rules dialog box from the Manage Dynamic Column page.
24 Column Properties

Overview of Column Properties

Use the Configure Column Properties page to configure a column's properties. The number of sections that appear on the page and the fields that appear in the sections vary depending on the column you're configuring.

Pages

The following table shows on which page the Configure Column Properties page is available and where the columns appear:

<table>
<thead>
<tr>
<th>Page</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure Worksheet Page Layout</td>
<td>Summary table of the worksheet</td>
</tr>
<tr>
<td></td>
<td>Detail table of the worksheet</td>
</tr>
<tr>
<td>Configure Budget Page Layout</td>
<td>Summary table of the budget sheet</td>
</tr>
<tr>
<td></td>
<td>Detail table of the budget sheet</td>
</tr>
<tr>
<td></td>
<td>Worker List page</td>
</tr>
</tbody>
</table>

Sections

The following table lists the sections and what you configure on them:

<table>
<thead>
<tr>
<th>Section</th>
<th>Configures</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Display and storage of data</td>
</tr>
<tr>
<td>Visibility and Access</td>
<td>Visibility of a column and who can view or update it</td>
</tr>
<tr>
<td></td>
<td>Security of columns based on the presence or absence of a particular role or roles</td>
</tr>
<tr>
<td>Default Values</td>
<td>Settings that control default values displayed in the column</td>
</tr>
<tr>
<td>Element Mapping</td>
<td>How to transfer approved compensation awards to HR</td>
</tr>
<tr>
<td>Information</td>
<td>Additional information or details about the data displayed in any column</td>
</tr>
</tbody>
</table>
Options to Configure the General Section

The options available in the General section control the display and storage of data. They vary depending on the type of column you’re configuring and the selections you make on the page. The section appears on the Configure Column Properties page.

The following table shows the fields that might appear in the section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Type</td>
<td>Number or character.</td>
</tr>
<tr>
<td>Rounding Rule</td>
<td>How you want numbers to round.</td>
</tr>
<tr>
<td>Decimal Place to Display</td>
<td>The number of places to show to the right of the decimal.</td>
</tr>
<tr>
<td>Show Numeric Separators</td>
<td>Display numeric separators, such as commas and periods.</td>
</tr>
<tr>
<td>Default Sequence</td>
<td>Sequence that the column appears in relation to the other columns.</td>
</tr>
<tr>
<td>Wrap text</td>
<td>Adjust row height rather than column width to show all of the field data.</td>
</tr>
<tr>
<td>Column Width</td>
<td>Column width in pixels from 50 to 200.</td>
</tr>
<tr>
<td>Column Shading</td>
<td>The color to apply as background for the column.</td>
</tr>
<tr>
<td>Monetary</td>
<td>Display monetary values. The application converts the values when managers change the worksheet display currency.</td>
</tr>
<tr>
<td>Include in Audit Trail</td>
<td>Include changes made to this column in the audit trail.</td>
</tr>
<tr>
<td>Value Remains Unchanged</td>
<td>The percentages stored in certain columns are to remain static and not change even when the corresponding amount changes.</td>
</tr>
<tr>
<td>Lookup Type</td>
<td>Display the related lookup type for the list value. Available for user-defined list columns only.</td>
</tr>
<tr>
<td>Display Total for All Components</td>
<td>Display a total for all components in the summary section of the worksheet. Available for numeric columns in the summary tab only.</td>
</tr>
</tbody>
</table>
Related Topics

- What happens if I select Value Remains Unchanged when I configure a column’s properties

Options to Configure the Visibility and Access Section

You use the **Visibility and Access** section to configure if a column is visible and who can view or update it. You can also secure columns based on the presence or absence of a particular user role. For example, you want compensation managers to view and update a different set of worksheet columns than line managers. The section appears on the Configure Column Properties page.

Main Column Settings

The main column settings control column access when you don't select overrides. When you do select override roles, these settings control column access for all other roles. The following table shows the main column settings and what you configure:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Configures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Display the column on the worksheet.</td>
</tr>
<tr>
<td>Read-only</td>
<td>Make the column not editable on the worksheet.</td>
</tr>
<tr>
<td>Initially hidden</td>
<td>Hide the column in the worksheet until the manager selects to display it in the worksheet. Managers can add the hidden column to their worksheet by using the <strong>View</strong> menu.</td>
</tr>
</tbody>
</table>

Role-Based Overrides

You override main column values on the worksheet based on role by selecting an override setting and adding one or more roles. Overrides apply only to roles added. The following table shows the override values and actions:

<table>
<thead>
<tr>
<th>Value</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Enabled</td>
<td>Disable previously configured setting</td>
</tr>
<tr>
<td>Read Only</td>
<td>Role has read only access</td>
</tr>
<tr>
<td>Updatable</td>
<td>Role has update access</td>
</tr>
<tr>
<td>Blank</td>
<td>Don't override the main column values</td>
</tr>
</tbody>
</table>

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Specify how the override settings apply to the roles you added by selecting one of these values:

- User has any of these roles
- User has none of these roles

Options to Configure the Default Values Section

Use the Default Values section to specify settings that control default values displayed in the column. The values populate the column on the worksheet when you run the Start Compensation Cycle process or the Refresh Data process. To include the column when you run the Refresh Data process, ensure that the column value is subject to refresh. Configuring default values is optional. The section appears on the Configure Column Properties page.

Default Values

The following table shows the default values and what you configure:

<table>
<thead>
<tr>
<th>Value</th>
<th>Configures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Value</td>
<td>Enter an initial, specific value for a column.</td>
</tr>
<tr>
<td>Default and Override Formula</td>
<td>Override any existing values and display values using the Compensation Default and Override formula type.</td>
</tr>
<tr>
<td></td>
<td>Test the formula for a sample person record to verify that the formula returns the expected results.</td>
</tr>
<tr>
<td>Compensation Derived Factor</td>
<td>Display values using a compensation derived factor.</td>
</tr>
<tr>
<td>Cross Reference Fields</td>
<td>For certain columns you have the option to cross reference data from other columns and plans.</td>
</tr>
<tr>
<td>External Data Record Type</td>
<td>User-defined lookup that stores record type from another application or third party.</td>
</tr>
<tr>
<td>External Data Column</td>
<td>Source column for values from the external data table.</td>
</tr>
</tbody>
</table>

Related Topics

- Formula Type for Compensation Default and Override
Options to Configure the Element Mapping Section

When you configure compensation component columns you identify how to transfer approved compensation awards to HR. You use the Element Mapping section for the Compensation Amount column to identify awards as salary adjustments or as lump sum payments. The section appears on the Configure Column Properties page.

Adjustment to Base Pay

If the compensation component is an adjustment to base pay you select Yes for Post as Salary. The application updates each worker's salary record with the amount stored in the column. If you want to post the current salary adjustment as an itemized adjustment, you can optionally select a salary component, which creates a salary component record in each worker's main salary record.

- If you map to salary components, the Transfer Data to HR process posts approved salary adjustments to the individual components in the worker salary records.
- If you don't map to a salary component, the transfer process posts the sum of all components as a single salary adjustment to worker salary records.

Example

You have a plan with two salary components for a worker's allocations:

- Merit Pay = 5,000 USD
- Cost of Living Allocation (COLA) = 1,500 USD

You want both of these components to increase the worker's base pay amount and you want to retain the breakdown of the amount for each component. When you configure the Compensation Amount columns for the Merit Pay and COLA components, you map:

- Merit Pay plan component to the Merit Salary component
- COLA plan component to the COLA salary component

The following table shows what the worker's salary record displays when the application transfers data to HR:

<table>
<thead>
<tr>
<th>Adjustment</th>
<th>Amount in USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>5,000</td>
</tr>
<tr>
<td>COLA</td>
<td>1,500</td>
</tr>
<tr>
<td>Total</td>
<td>6,500</td>
</tr>
</tbody>
</table>

You can modify the list of salary components available using the CMP_SALARY_COMPONENT lookup type.
Lump Sum Payment
If the compensation component is a lump sum payment, you select No for Post as Salary. You add the payroll elements to use to pay the compensation award. You can add multiple payroll elements to accommodate payments in different currencies and for workers in different legislative data groups.

Related Topics
• How Actions and Reasons, Salary Components, and Plan Components Work Together

Examples of Role Based Column Access
You can secure worksheet columns based on a particular role or roles. You select an override setting when you configure the worksheet column properties. Best practice is to configure the main column setting that applies to the most number of roles. Then, configure the override settings for the least number of affected roles. Follow these steps:
1. Enable columns using the Configure Worksheet Page Layout page.
2. Adjust access using the Configure Column Properties page, Visibility and Access section.

The following scenarios illustrate when you might want to vary column access.

One Role Can See the Column, But the Other Role Cannot
You want compensation managers to see compa-ratio, but not line managers. Follow these steps:
1. Enable the Compa-Ratio column under the main column settings.
2. In the Visibility and Access section, select the values as shown in the table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Override Setting</td>
<td>Not Enabled</td>
</tr>
<tr>
<td>Condition</td>
<td>User has any of these roles</td>
</tr>
</tbody>
</table>
3. Add the line manager role.

Both Roles Can See the Column, But Only One Role Can Update
You want both compensation managers and line managers to see the user-defined column, Individual Performance Multiplier, but only compensation managers to update it. Follow these steps:
1. Enable a user-defined numeric column and title it Individual Performance Multiplier.
2. In the Visibility and Access section, select the values as shown in the table:
Column Properties

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Column Settings</td>
<td>Read-only</td>
</tr>
<tr>
<td>Override Setting</td>
<td>Updatable</td>
</tr>
<tr>
<td>Condition</td>
<td>User has any of these roles</td>
</tr>
</tbody>
</table>

3. Add the compensation manager role.

All Roles Can See and Update the Column, Except for Alternate Approvers

You want compensation managers and line managers to see and update the user-defined column Individual Performance Multiplier. But, you don’t want alternate approvers who aren’t line managers or compensation managers to view or update it. Follow these steps:

1. Enable a user-defined numeric column and title it Individual Performance Multiplier.
2. In the Visibility and Access section, select the values as shown in the table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Column Settings</td>
<td>Enabled</td>
</tr>
<tr>
<td>Override Setting</td>
<td>Not enabled</td>
</tr>
<tr>
<td>Condition</td>
<td>User has none of these roles</td>
</tr>
</tbody>
</table>

3. Add the line manager and compensation roles.

Guidelines to Configure the Eligible Salary Column

You must configure the Eligible Salary column for each component in the plan when you use percentage columns or when your budget pool stores budgets as percentages.

Many calculations use *eligible salary*, such as

- Allocation percentage
- Target percentage
- Worker budget percentages
You might make eligible salary equal to each worker's current base pay, or you might prorate it based on various factors.

To define eligible salary:

- Select a fast formula or derived factor while you configure the column properties on the Configure Column Properties page, Default Values section
- Use dynamic calculations to determine each worker's eligible salary using the Manage Dynamic Columns page

Delivered samples of eligible salary proration formula are available to copy and modify from the Manage Fast Formula page. Use the Compensation Default and Override formula type.

Related Topics

- Examples of Dynamic Calculations
- Formula Type for Compensation Default and Override

Guidelines to Configure the Budget Amount - Worker Column

Calculation methods affect the monetary amounts shown in the Budget Amount - Worker column. The application stores these amounts in corporate currency.

When you use a fast formula to calculate an amount for the column, the value is calculated in the worker's local currency. However, the converted worker budget amounts displayed on the worksheet and budget sheet are in corporate currency.

When you use a dynamic calculation to calculate an amount for the Budget Amount - Worker column, you want to include the exchange rate. To calculate the corporate currency, divide the local currency value by the exchange rate for the corresponding component in the dynamic calculation.

Fast Formulas or Dynamic Columns to Display Information in Worksheet Columns

You can use fast formulas and dynamic columns to vary column results on the worksheet. The best method depends on the data you use, the complexity of the calculation, and the timing of the refresh data process.

Varying Worksheet Column Results

The following table compares the two methods.

<table>
<thead>
<tr>
<th>Comparison</th>
<th>Using Fast Formulas</th>
<th>Using Dynamic Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Used</td>
<td>Any data in Oracle Fusion applications that has a database item (DBI)</td>
<td>Other worksheet columns</td>
</tr>
</tbody>
</table>
Comparison | Using Fast Formulas | Using Dynamic Columns
---|---|---
Calculation | Simple to complex formulas that require multiple compound conditions or multiple database records | Simple “if then” expressions or a few compound conditions
Refresh Timing | You run the: • Start Compensation Cycle process for the first time • Refresh Data process with the Refresh column defaults or Full refresh option selected | You run the: • Start Compensation Cycle process for the first time • Refresh Data process with one of these options selected: • Refresh column defaults • Full refresh • Refresh dynamic columns • A manager tabs out of a column, if you select the Change worksheet data option
Where Created | Manage Fast Formulas task | Manage Dynamic Columns page

Related Topics
- Dynamic Calculations in Compensation Plans
- Formula Type for Compensation Default and Override
- Overview of Using Formulas

Guidelines to Configure Numeric Properties in Models

When you configure numeric columns you determine the following numeric properties: whether to use numeric separators, how to round numbers, and how many decimal places display.

Numeric Properties

When you use the numeric columns in models, the numeric properties vary depending on from where you open the model and where you configured the column. The following table shows the source of the column configuration by where you open the model.

<table>
<thead>
<tr>
<th>Model Region</th>
<th>Where Model Opened</th>
<th>Numeric Properties Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model Summary</td>
<td>Budget Sheet</td>
<td>Configure Budget Page Layout Summary Tab, Define Column Properties page</td>
</tr>
</tbody>
</table>
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>
<tr>
<td>What do your external data user-defined columns represent?</td>
<td>Column 01 is Beginning Balance</td>
</tr>
<tr>
<td></td>
<td>Column 02 is Ending Balance</td>
</tr>
</tbody>
</table>

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.
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.

Field          | Value            |
----------------|------------------|
Record Type     | Fidelity 401K   |
Start Date      | 1/1/14           |
End Date        | 12/31/14         |
Sequence Number | 1                |
Currency        | US Dollar        |
Column 01       | 100,000          |
Column 02       | 132,000          |
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>
<tr>
<td>External Data Column</td>
<td>Column 02</td>
</tr>
</tbody>
</table>

16. Click OK to return to the Configure Worksheet Page Layout page.
17. Click Save and Close to return to the Configure Worksheet Display page.
18. Click Save and Close to return to the Define Workforce Compensation page.
19. Click Done to return to the Manage Workforce Compensation Plans page.

### 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>Item Name</td>
<td>Beginning Balance</td>
<td>Ending Balance</td>
</tr>
<tr>
<td>Source Type</td>
<td>External Data</td>
<td>External Data</td>
</tr>
<tr>
<td>Record Type</td>
<td>Fidelity 401K</td>
<td>Fidelity 401K</td>
</tr>
<tr>
<td>Column</td>
<td>Column 01</td>
<td>Column 02</td>
</tr>
<tr>
<td>Type of Compensation</td>
<td>Monetary</td>
<td>Monetary</td>
</tr>
<tr>
<td>Currency</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
- How can I add external compensation data to use in workforce compensation and total compensation statements
Considerations for Cross Referencing Data Between Plans

To see data combined from multiple plans in one plan, create a single reporting plan and cross reference data for certain columns from other compensation plans. The referenced data is available in the new plan immediately after you save the worksheet in the originating plan. When you set up a new plan, you configure the column properties for the worksheet columns. If the type of column is available to cross reference, then you can specify the following default values:

- Cross-reference plan
- Cycle matching
- Column to cross reference

Cross-Reference Plan

You can cross reference all active plans, even plans with no started cycles. You can also reference a plan within itself to display values from a previous plan cycle in a subsequent cycle. For example, you can display a target amount from a previous plan cycle in the current plan cycle. Managers are aware of that data when making a current compensation decision.

Cross-referencing a column from another plan is not available if you have selected values for these fields on the Configure Column Properties page:

- Default Value
- Default and Override Formula
- Compensation Derived Factor

Cycle Matching

You select which cycle to use to obtain the reference data by specifying the cycle to match. You must start the cycle first. The following table describes the cycle matching values:

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same Cycle Extract Date</td>
<td>Match the HR Data Extraction Date of the current plan’s cycle to find the cross-reference plan’s cycle.</td>
</tr>
<tr>
<td>Same Cycle Display Name</td>
<td>Match exactly the same display name of the current plan’s cycle to find the cross-reference plan’s cycle.</td>
</tr>
<tr>
<td>Previous Cycle Extract Date</td>
<td>Compare the current plan’s HR Data Extraction Date to the most recent extract date from the cross reference plan. The extract date from the cross reference plan must be earlier than the current plan’s date. You can use this value to reference data from cycle to cycle within the same plan, such as to bring in values from last year’s bonus cycle.</td>
</tr>
<tr>
<td>Value</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Latest Cycle Extract Date</td>
<td>Obtain the latest extract date from the cross reference plan without regard to the current plan's extract date. You can use this value in a total compensation plan that is always available and automatically clears after the new cycles run.</td>
</tr>
</tbody>
</table>

### Columns to Cross Reference

You can cross reference most columns in the cross reference plan. You can't cross reference the following types of columns:

- Promotion columns
- Performance Management columns
- Iconic columns
- HR data columns
- Percentage columns
- Columns that are cross referenced from another plan

### Examples of Cross Referencing Data Between Plans

The following examples illustrate when to cross reference data between compensation plans.

#### Example 1

You create a salary plan and a bonus plan. You want managers to have a total compensation view when awarding from either plan, even if they are not open concurrently. Follow these steps:

1. In the bonus plan, reference the **New Salary** or **Salary Change Amount** column.
2. In the salary plan, reference the **Bonus Amount** column.

#### Example 2

Your company wants to create a single compensation change statement that includes compensation awarded from multiple plans. Follow these steps:

1. Create a compensation statement plan.
2. Reference all the compensation awarded from each of the different plans into the compensation statement plan.
3. Generate worker statements from the single plan.

Each worker receives only one compensation statement.
Formula Type for Compensation Default and Override

The Compensation Default and Override formula determines the default values populated in a column for a workforce compensation plan. When you configure the worksheet display for a column in the Configure Column Properties page, Default Values section, you can select this formula.

The following predefined formulas are available for the eligible salary column for this formula type.

Caution: Use these formulas as samples for testing purposes only. Copy and create your own version of a formula for use in your own compensation plans. Modifying the sample formula might provide unexpected results upon upgrade.

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE</td>
<td>Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_MONTH_END_AVERAGE</td>
<td>Eligible salary calculated by averaging salary on the last day of each month in the workforce compensation cycle evaluation period. Uses salary on the last day of the evaluation period for midmonth evaluation end dates.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_NINETY_DAY_MIN</td>
<td>Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period. Returns zero for workers who worked fewer than 90 days.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_USING_FTE</td>
<td>Eligible salary calculated by averaging daily salary adjusted for part-time workers. Accounts for number days that a salary is in effect and FTE during the workforce compensation cycle evaluation period.</td>
</tr>
<tr>
<td>CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_FOR_JOBS</td>
<td>Eligible salary calculated by averaging salary for the number of days a worker holds a specific job code on the assignment. Accounts for the number of days that a salary is in effect during the workforce compensation cycle evaluation period.</td>
</tr>
</tbody>
</table>

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.

<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>Unique numeric identifier for the workforce compensation plan</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_ID</td>
<td>Number</td>
<td>Y</td>
<td>Unique numeric identifier for the fiscal calendar period</td>
</tr>
<tr>
<td>CMP_IV_COMPONENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Unique numeric identifier for the workforce compensation plan component</td>
</tr>
<tr>
<td>CMP_IV_ITEM_NAME</td>
<td>Char</td>
<td>Y</td>
<td>Name for the workforce compensation plan item</td>
</tr>
<tr>
<td>CMP_IV_PERSON_ID</td>
<td>Number</td>
<td>Y</td>
<td>Unique numeric identifier for the worker associated with the workforce compensation plan</td>
</tr>
<tr>
<td>CMP_IV_PLAN_START_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the workforce compensation plan becomes active</td>
</tr>
<tr>
<td>CMP_IV_PLAN_END_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the workforce compensation plan becomes inactive</td>
</tr>
<tr>
<td>CMP_IV_PLAN_ELIG_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the workforce compensation plan becomes eligible</td>
</tr>
</tbody>
</table>
# Column Properties

<table>
<thead>
<tr>
<th>Input Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_IV.PERFORMANCE_EFF_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date to use for compensation performance ratings</td>
</tr>
<tr>
<td>CMP_IV.PROMOTION_EFF_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which job, grade, and position changes take effect</td>
</tr>
<tr>
<td>CMP_IV.XCHG_RATE_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Date on which the application obtains conversion rates from the GL daily rates table</td>
</tr>
<tr>
<td>CMP_IV.ASSIGNMENT_ID</td>
<td>Number</td>
<td>Y</td>
<td>Date to use for assignments</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_DEFAULT_VALUE</td>
<td>Number/ Char/Date</td>
<td>Y</td>
<td>Default value from the formula. The date should be in yyyy/mm/dd format</td>
</tr>
<tr>
<td>L_DATA_TYPE</td>
<td>Char</td>
<td>Y</td>
<td>Data type of the column</td>
</tr>
</tbody>
</table>

## Sample Formula

This sample formula determines the value of a column based on its item name.

```plaintext
/*************************************************************************** FORMULA NAME : Compensation Default and Override Formula FORMULA TYPE : Compensation Default and Override DESCRIPTION : Defaults the value of a column based on its item_name ****************************************************************************/

/*----------------* INPUT VALUES DEFAULTS BEGIN *******************/
INPUTS ARE CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number), CMP_IV_ITEM_NAME (text)
/*----------------* INPUT VALUES DEFAULTS ENDS*********************************/

/*----------------* FORMULA SECTION BEGIN ***********************************/
DEFAULT FOR CMP_IV_ITEM_NAME IS 'YYYYYYY'
L_DEFAULT_VALUE = to_char(0)
IF (CMP_IV_ITEM_NAME = 'AmountComp1') THEN
  (L_DEFAULT_VALUE = to_char(3333))
ELSE IF (CMP_IV_ITEM_NAME = 'AmountComp2') THEN
  (L_DEFAULT_VALUE = to_char(7777))
/*----------------* FORMULA SECTION ENDS***********************************/
```
How You Test and Troubleshoot the Default and Override Formula

You can test the Default and Override formula that you use to determine a column's default value when you configure the column properties. For example, when you configure the Eligible Salary column, you select an eligible salary proration formula to calculate the eligible salary for your workers. To test the results, you select a sample worker and assignment. The Test Results dialog box returns a value of 40,000, which is the expected eligible salary for the worker that you tested.

The following table describes some of the results you might receive and the corrective actions:

<table>
<thead>
<tr>
<th>Results</th>
<th>Corrective Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value you expect</td>
<td>None</td>
</tr>
<tr>
<td>Incorrect formula</td>
<td>Go to the Manage Fast Formula page to correct your formula.</td>
</tr>
<tr>
<td>No salary</td>
<td>Check the person's salary record and ensure that the record exists as of the HR Data Extract Date</td>
</tr>
<tr>
<td>Person is ineligible</td>
<td>Check the eligibility profile associated with the assignment.</td>
</tr>
</tbody>
</table>

Related Topics

- Formula Type for Compensation Default and Override
FAqs

What happens to the plan level default worksheet display configurations if managers set their own default display?

The default display settings that managers set on the worksheet take precedence over the plan-level settings on the Configure Default Worksheet Display page.
Predefined Alerts

You can use predefined alerts to notify managers about issues on the worksheet that need their attention. Use the Configure Alerts page to enable predefined alerts.

Predefined Alerts

Here are the conditions on the worksheet or changes in HR that trigger predefined alerts.

<table>
<thead>
<tr>
<th>Predefined Alert</th>
<th>Trigger</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary changed in HR</td>
<td>Salary amount changed in HR</td>
</tr>
<tr>
<td>Allocation outside target range</td>
<td>Compensation amount is less than the target minimum or greater than the target maximum configured on the Configure Worksheet Page Layout page</td>
</tr>
<tr>
<td>Grade changed in HR</td>
<td>Grade changed in HR</td>
</tr>
<tr>
<td>Primary worksheet manager does not match line manager</td>
<td>Primary worksheet manager doesn't match line manager on the worker’s employment record</td>
</tr>
<tr>
<td>New salary outside salary range</td>
<td>New salary amount is less than the salary range minimum or greater than the salary range maximum for their current grade</td>
</tr>
<tr>
<td>Worker was terminated</td>
<td>Worker was terminated in HR</td>
</tr>
</tbody>
</table>

The HCM Events framework triggers the HR related alerts. When you run the refresh process, the alerts clear, as the data are now in sync with HR.

Create a User-Defined Alert

This example demonstrates how to create an alert that displays a warning on the worksheet when a manager allocates a bonus amount that is more than the recommended bonus amount. The following table summarizes key decisions for this scenario.
### Decisions to Consider

<table>
<thead>
<tr>
<th>What worksheet actions do you want to trigger the alert?</th>
<th>Manager allocates a bonus amount that is more than the recommended bonus amount.</th>
</tr>
</thead>
<tbody>
<tr>
<td>What type of alert do you want to display?</td>
<td>Warning</td>
</tr>
</tbody>
</table>

### Task Summary

To create the alert, complete the following tasks. Use the default values except where otherwise indicated.

1. Create an alert.
2. Test the alert.

### Prerequisite

1. Create a workforce compensation plan.

### Creating the Alert

1. On the Define Workforce Compensation page, Configure Alerts row, click **Go to Task**.
2. In the Alerts section, click the **Add** button.
3. In the new row complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Bonus exceeds maximum recommended amount</td>
</tr>
<tr>
<td>Type</td>
<td>Warning</td>
</tr>
<tr>
<td>Description</td>
<td>You allocated more than the recommended bonus amount</td>
</tr>
</tbody>
</table>

4. Click the **Define Condition that Displays Alert on Worksheet** button.
5. On the Edit Condition dialog box, Basic tab, click **Build Condition**.
6. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Bonus Amount</td>
</tr>
</tbody>
</table>
### Oracle Human Capital Management Cloud

#### Implementing Workforce Compensation

## Chapter 26

### Alerts

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operation</td>
<td>Is greater than</td>
</tr>
</tbody>
</table>

7. Click **Switch to Column**.
8. Select **Bonus Target Amount**.
9. Click **Done**.
10. Click **Validate**. This step is optional.
11. Click **OK**.
12. Click **Apply**.

### Testing the Alert

1. Click the **Test Alert Condition** button.
2. On the Test Condition dialog box complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bonus Amount</td>
<td>5000</td>
</tr>
<tr>
<td>Bonus Target Amount</td>
<td>2000</td>
</tr>
</tbody>
</table>

3. Click **Test**.
4. Verify that the results are as expected in the Review Results dialog box and click **Done**.

### Examples of User-Defined Alerts

You can create alerts that appear in the worksheet that notify managers to conditions that exist. Use the Configure Alerts page to define:

- The type of alert
- The criteria that triggers the alert
- A description that appears with the alert

The following scenarios illustrate when you might want to create alerts.
Warning Managers That Their Compensation Amounts Changed After They Allocated Compensation

You want to warn managers when someone changes a compensation amount that they entered for a worker. You create a condition that triggers an alert anytime someone overrides an amount entered by the person who supplied the original amount. The following table shows how you create the alert.

<table>
<thead>
<tr>
<th>Field</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Warning</td>
</tr>
<tr>
<td>Criteria</td>
<td>Original Amount Updated By - Component 1 column is not equal to Compensation Amount Last Updated By - Component 1 column</td>
</tr>
<tr>
<td>Description</td>
<td>The amount you entered was overridden.</td>
</tr>
</tbody>
</table>

Preventing Managers From Allocating More Than Targeted

Your company policy prohibits managers from allocating more compensation than is targeted for a worker. You create a condition that triggers an alert when a manager allocates more than the worker's targeted amount and tells the manager how to resolve the problem. Error preventing submit alerts prevent managers from saving or submitting their worksheets until they resolve the issue. The following table shows how you create the alert.

<table>
<thead>
<tr>
<th>Field</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Error preventing submit</td>
</tr>
<tr>
<td>Criteria</td>
<td>Compensation Amount column is greater than Compensation Target column</td>
</tr>
<tr>
<td>Description</td>
<td>Compensation amounts can't exceed defined targets. Adjust the amount you allocated to the worker.</td>
</tr>
</tbody>
</table>
Notifying Managers When New Base Salary Is Greater Than Salary Range Maximum

You want to notify managers when a worker’s new base salary exceeds the worker's salary range maximum. The following table shows how you create the alert.

<table>
<thead>
<tr>
<th>Field</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Information</td>
</tr>
<tr>
<td>Criteria</td>
<td><strong>New Base Salary</strong> column is greater than:</td>
</tr>
<tr>
<td></td>
<td><strong>Salary Range Maximum - Current</strong> column</td>
</tr>
<tr>
<td></td>
<td>Or</td>
</tr>
<tr>
<td></td>
<td><strong>Salary Range Maximum - New</strong> column</td>
</tr>
<tr>
<td>Description</td>
<td>Worker's new salary exceeds the worker's salary range maximum.</td>
</tr>
</tbody>
</table>
27 Individual Worker Display

How You Configure Individual Worker Display

You can configure a worksheet page to show information about an individual worker. In the worksheet, managers click the worker's name to open the page. Depending on how you configure the page, managers can allocate compensation, promote workers, add notes and attachments, and view alerts. You configure the display on the Configure Individual Worker Display page.

The aspects of individual worker display page configuration are:

- Page properties
- Page content
- Preview individual worker display

Page Properties

You can configure pages to display information in either of these ways:

- As a single vertical page with information in sections
- Using up to 10 infotiles on the left side of the worksheet page. Managers click infotiles to display detailed information.

Page Content

You add content to either type of page by adding sections and specifying their display sequence. The single page and an infotile can have up to 15 sections. You can add a mix of information about the page using different content types and components.

The following table shows the content types and their data sources.

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Content Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predefined Content</td>
<td>Selected worksheet columns from the Configure Worksheet Page Layout page</td>
</tr>
<tr>
<td></td>
<td>• Alerts</td>
</tr>
<tr>
<td></td>
<td>• Attachments</td>
</tr>
<tr>
<td></td>
<td>• Job history</td>
</tr>
<tr>
<td></td>
<td>• Notes</td>
</tr>
<tr>
<td></td>
<td>• Performance history</td>
</tr>
<tr>
<td>Summary</td>
<td>Summary columns from the Configure Worksheet Page Layout page.</td>
</tr>
<tr>
<td>Worksheet Columns</td>
<td>All worksheet columns from the Configure Worksheet Page Layout page.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Content Source</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Salary Rates</td>
<td>Rate data from the salary tables as of the HR data extraction date.</td>
</tr>
</tbody>
</table>

⚠️ **Caution:** Any changes you make here to a worksheet column's properties or dynamic calculations changes the data in the Configure Worksheet Page Layout page as well. This is not the case for the salary rates data.

The following figure shows the data source is the same for worksheet columns data displayed on both pages.

You can mix the content types within the page. For example, you have one infotile for all employment information using the Worksheet Column type. Then, you have another infotile for the salary rates information. Finally, you use the
Predefined Content type to add Alerts, Notes, and Attachments. You can create something similar for the single page setup.

Tip: The predefined content renders best when you add one per section.

Preview Individual Worker Display
You can see what the page looks like on the worksheet. All data fields are blank. Configuring the individual worker display is an iterative process. You return to the previous pages, make edits, and preview again.

Related Topics
- Overview of Column Properties
- Dynamic Calculations in Compensation Plans
28 Reports and Dimensions

OTBI Reports in Compensation

You can use Oracle Transactional Business Intelligence (OTBI) to create real-time reports using Workforce Compensation, salary and stock data. In the Workforce Compensation work area, you can make these reports available to line managers to reference during a compensation cycle.

For more information on creating OTBI reports, see the Oracle Business Intelligence Enterprise Edition User's Guide.

Adding the Reports to a Compensation Plan

All OTBI and Oracle Business Intelligence Enterprise Edition (OBIEE) reports that you save in the shared/custom/HCM/Compensation folder are available to add to a Workforce Compensation plan. As you configure the reports for the plan, you can add reports from this folder and provide a new display name, if you want. You can add up to 25 reports for each plan. Removing a report from a plan doesn't delete the source report from its original location.

Implementor Access

The Compensation Manager and Compensation Analyst roles contain the privileges to view and create OTBI reports. Implementors must have the Compensation Manager role to view the available reports, in addition to the Compensation Administrator role required to set up a compensation plan.

Line Manager Access

Line managers must have the Compensation Transaction Analysis Duty role to view OTBI reports. The delivered line manager role doesn't inherit this duty role. You must create a line manager role that includes the Compensation Transaction Analysis Duty. Then, line managers can access an OTBI report from the Reports task pane in the workforce compensation work area. All managers at all levels of the hierarchy can view the reports.

Dimensions in Compensation

Dimensions are attributes that you use to group data in reports or as criteria when building models. You can enable the dimensions that have meaning to your organization within the context of the plan. Some examples of delivered dimensions are:

- Country
- Department
- Years of service
- Performance management rating
- Location
- Job
- Position
Aspects of dimensions include:

- Reporting usage
- Modeling usage
- Range increments

### Reporting Usage

Reports use dimensions to group data. For example, you can analyze:

- Compensation allocations by country and job to see how average allocations vary
- Salaries by performance rating and *compa-ratio* to verify data or correct pay discrepancies, for a given manager’s team

### Modeling Usage

Models use dimensions as criteria to build models. For example, when you create a model to automatically allocate salary adjustment amounts, you know that a worker’s country and location affect the allocation. You can select **Country** and **Location** as modeling criteria to model values for workers who meet each combination of criteria.

### Range Increments

When aggregating data across people, you can define increments to display for the following ranges:

- Compa-Ratio
- Salary Range Position
- Years Employed
- Performance Management Calculated Overall Rating
- Performance Management Calculated Goal Rating
- Performance Management Calculated Competency Rating

Graphs and tables don’t show a separate data point for each person. Instead, they show people grouped within the increments defined. For example, when using compa-ratio to group data in reports, you want to see workers grouped in increments of 10 percentage points. The model groups together all workers whose compa-ratio falls between 80 and 90.
29 Validation and Processing

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.
## Global Settings

### Notifications in Workforce Compensation

You can enable workflow notifications to be sent when managers perform certain actions using the Configure Global Settings task. The Request Information notification is always enabled. The field doesn't appear on the Configure Global Settings page.

#### Notification Text

The notification name identifies the manager action that sends the notification. Each notification consists of header and message text, which is not configurable.

<table>
<thead>
<tr>
<th>Notification</th>
<th>Header Text</th>
<th>Message Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Published</td>
<td>Compensation Budget Published for {manager who received the budget} {budget amount} {currency code}</td>
<td>{manager who published the budget} published a budget to you for the plan {plan name}. You can publish budgets to lower managers or begin allocating compensation.</td>
</tr>
<tr>
<td>Worksheet Submitted</td>
<td>Approval of {plan name} for {submitting manager}</td>
<td>{submitting manager} submitted {plan name} worksheet for approval. Review it and take the appropriate approval action.</td>
</tr>
<tr>
<td>Worksheet Returned for Correction</td>
<td>Your {plan name} Worksheet is Returned for Correction</td>
<td>{submitting manager} returned your worksheet for correction. Review it, make the necessary changes, and resubmit for approval</td>
</tr>
<tr>
<td>Worksheet Approved by Higher Manager</td>
<td>Your {plan name} Worksheet is Approved</td>
<td>Your worksheet was approved by {approving manager}. It is still in the approval process until final approval is obtained.</td>
</tr>
<tr>
<td>Final Approval Obtained</td>
<td>{plan name} Worksheet is Fully Approved</td>
<td>Your worksheet has obtained final approval.</td>
</tr>
<tr>
<td>Plan Access Changed</td>
<td>{plan name} Worksheet Access Was Changed</td>
<td>Your access to the plan and cycle was changed.</td>
</tr>
<tr>
<td>Worksheet Withdrawn</td>
<td>{plan name} Worksheet was Withdrawn by {manager name}</td>
<td>{withdrawing manager} withdrew the {plan name} worksheet. {withdrawing manager} will resubmit the worksheet when it is ready for your approval.</td>
</tr>
<tr>
<td>Notification</td>
<td>Header Text</td>
<td>Message Text</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Budget Withdraw</td>
<td>Compensation Budget Withdrawn by {manager name}</td>
<td>{manager name} withdrew your budget for {plan name}. Your worksheet will display a zero available budget.</td>
</tr>
<tr>
<td>Due Date Changed</td>
<td>{plan name} Worksheet Due Date Changed</td>
<td>Your due date changed. Submit your worksheet on or before the new due date shown.</td>
</tr>
<tr>
<td>Worksheet Overridden by Higher Manager</td>
<td>Your {plan name} Worksheet was Modified by {manager name}</td>
<td>Compensation allocations for one or more of your workers was overridden by {manager name}. View details of the override from the plan worksheet.</td>
</tr>
<tr>
<td>Request for Information</td>
<td>Information Request from {manager name} Regarding {plan name}</td>
<td>{manager name} requested additional information about your worksheet. Review the comments and provide a response.</td>
</tr>
<tr>
<td>Eligibility Change</td>
<td>Eligibility Change Requested by {manager name} {{worker name}}</td>
<td>{manager name} requested to change worker eligibility for the plan or component. Review the request and take the appropriate action</td>
</tr>
<tr>
<td>Worker Reassignments</td>
<td>Worker Reassignment Requested by {manager name} {{plan name}}</td>
<td>{manager name} requested to reassign the following workers to your worksheet. The reassignment is only effective for the plan and cycle shown and does not affect the manager relationship in worker employment records. Review the request and take the appropriate action</td>
</tr>
<tr>
<td>Delegate Worker</td>
<td>Workers Added to Your Compensation Worksheet</td>
<td>No predefined text.</td>
</tr>
<tr>
<td>Remove Worker Delegation</td>
<td>Workers Removed from Your Compensation Worksheet</td>
<td>No predefined text.</td>
</tr>
<tr>
<td>Delegate Worker</td>
<td>Worker Delegation Requested by {0} {{1}}</td>
<td>The following workers will be added to your compensation worksheet.</td>
</tr>
<tr>
<td>Remove Worker Delegation</td>
<td>Worker Delegation Removal Requested by {0} {{1}}</td>
<td>The following workers will be removed from your compensation worksheet.</td>
</tr>
</tbody>
</table>
How Notifications Work in Workforce Compensation

You can send notifications when managers perform certain actions on the worksheet or budget sheet. The type of notification sent depends on the selections made on the Configure Global Settings page.

Settings That Affect the Workforce Compensation Notifications

The following table shows the individual action that you can set the notification to and examples of each action.

<table>
<thead>
<tr>
<th>Notification Setting</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify</td>
<td>Always send notifications for all worksheet actions</td>
</tr>
<tr>
<td>Prompt manager</td>
<td>Send notifications for actions only if the initiating manager selects</td>
</tr>
<tr>
<td>Approval required</td>
<td>Require approval for eligibility changes</td>
</tr>
<tr>
<td>Disable</td>
<td>Disable notifications so that none are sent when the plan access changes</td>
</tr>
</tbody>
</table>

Disable is the only action available for all settings. The Request Information notification is always enabled. The field doesn't appear on the Configure Global Settings page.

How the Workforce Compensation Notifications Work

The following table describes:

- What action initiates the notification
- Who initiates and receives the notification
- Actions, if any, that are available to the notification receiver within the notification
- Conditions that cause the bypass of the notification

<table>
<thead>
<tr>
<th>Notification</th>
<th>Initiating Action</th>
<th>Initiator</th>
<th>Receiver</th>
<th>Actions Available to the Receiver</th>
<th>Condition Causing Bypass of Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Published</td>
<td>Manager's worksheet status changes from Not Started to Budget Available</td>
<td>Manager who published a budget to lower managers</td>
<td>Lower-level manager for whom a budget amount was published</td>
<td>Close</td>
<td>None</td>
</tr>
</tbody>
</table>
### Table: Notification and Initiating Action Details

<table>
<thead>
<tr>
<th>Notification</th>
<th>Initiating Action</th>
<th>Initiator</th>
<th>Receiver</th>
<th>Actions Available to the Receiver</th>
<th>Condition Causing Bypass of Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worksheet Submitted</td>
<td>Manager’s worksheet status changes to <strong>Submitted</strong></td>
<td>Primary worksheet manager or switched manager who initiated the action</td>
<td>Manager one level up from sender in the plan hierarchy. If alternate approver exists, receiver is the alternate approver</td>
<td>Approve</td>
<td>Submitting manager is the highest level approver in the hierarchy</td>
</tr>
<tr>
<td>Worksheet Returned for Correction</td>
<td>Manager’s worksheet approval status changes to <strong>Return for Correction</strong></td>
<td>Higher-level manager or user who switched to manager and returned lower manager’s worksheet. This could be an alternate approver</td>
<td>Manager whose worksheet was returned for correction</td>
<td>Close</td>
<td>None</td>
</tr>
<tr>
<td>Worksheet Approved by Higher-Level Manager</td>
<td>Manager’s worksheet status changes to <strong>In Approvals</strong></td>
<td>Higher-level manager who approved using the submit notification or switched manager who initiated the action. The manager is not the final approver. This could be an alternate approver</td>
<td>Manager whose worksheet status changed to <strong>In Approvals</strong></td>
<td>Close</td>
<td>Manager’s worksheet access is <strong>No Access</strong></td>
</tr>
<tr>
<td>Final Approval Obtained</td>
<td>Manager’s worksheet status changes to <strong>Fully Approved</strong></td>
<td>Top-level approver who approved a lower managers worksheet using the submit for approval notification or the approval action from the worksheet. This could be the top alternate approver</td>
<td>Manager whose worksheet is approved and all subordinate managers</td>
<td>Close</td>
<td>Manager’s worksheet access is <strong>No Access</strong></td>
</tr>
<tr>
<td>Plan Access Changed</td>
<td>Higher level manager selects <strong>Change Access for All Managers</strong> or <strong>Change Access for Selected</strong></td>
<td>Manager who changed another manager’s plan access</td>
<td>Manager whose plan access was changed</td>
<td>Close</td>
<td>None</td>
</tr>
<tr>
<td>Notification</td>
<td>Initiating Action</td>
<td>Initiator</td>
<td>Receiver</td>
<td>Actions Available to the Receiver</td>
<td>Condition Causing Bypass of Notification</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>-----------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Worksheet Withdrawn</td>
<td>Manager clicks Withdraw Submission</td>
<td>Primary worksheet manager who previously submitted the worksheet</td>
<td>Approver who received the original worksheet submitted notification from a lower manager</td>
<td>Close</td>
<td>None</td>
</tr>
<tr>
<td>Budget Withdrawn</td>
<td>Manager clicks Withdraw All Budgets or Withdraw Selected Budgets</td>
<td>Manager who previously published a budget to a lower manager</td>
<td>Lower-level manager for whom a budget amount was previously published</td>
<td>Close</td>
<td>None</td>
</tr>
<tr>
<td>Due Date Changed</td>
<td>Manager changes a due date for an individual manager or selects Change Due Date for All Managers from the Action menu.</td>
<td>Higher-level manager or administrator</td>
<td>Lower-level manager whose worksheet due date changed</td>
<td>Close</td>
<td>None</td>
</tr>
<tr>
<td>Worksheet Overridden by Higher Manager</td>
<td>Manager or administrator changes a compensation amount column that was supplied by another manager, and clicks Save</td>
<td>Manager who modified an amount or administrator</td>
<td>Manager or administrator who originally supplied the amount.</td>
<td>Close</td>
<td>None</td>
</tr>
<tr>
<td>Request for Information</td>
<td>Manager selects one or more managers on the approval task page, and clicks Request Information</td>
<td>Manager who requested information</td>
<td>Selected managers</td>
<td>Reply. This opens a dialog box to reply to the sender</td>
<td>None</td>
</tr>
<tr>
<td>Delegate Worker</td>
<td>Manager selects one or more workers on the worksheet and selects Delegate Workers from the Action menu</td>
<td>Primary worksheet manager</td>
<td>Manager selected to review the workers.</td>
<td>Dismiss</td>
<td>None</td>
</tr>
<tr>
<td>Notification</td>
<td>Initiating Action</td>
<td>Initiator</td>
<td>Receiver</td>
<td>Actions Available to the Receiver</td>
<td>Condition Causing Bypass of Notification</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>------------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Remove Worker Delegation</td>
<td>Manager selects one or more workers on the worksheet and selects <strong>Remove Delegations</strong> from the Action menu</td>
<td>Primary worksheet manager who previously delegated the workers.</td>
<td>Manager who was previously delegated the workers.</td>
<td>Dismiss, Approve, Reject</td>
<td>None</td>
</tr>
</tbody>
</table>

## FAQs

### Why did the default stock details change?

More than one administrator might have access to these settings. The following tasks use the stock price and currency information:

- View compensation history
- Manage workforce compensation
- Generate total compensation statements

### How can I configure the content that appears in the workforce compensation submit for approval notification?

You can use the Configure Worksheet Display task to configure the worksheet summary tables. The setup determines the content in the Compensation Summary, Performance Summary, and Promotions Summary sections of the notification.

You can use the BPM worklist composer to configure the Related Links and Comments sections content. You can't configure the Details and Summary sections content.

**Related Topics**

- How You Define Approvals for Human Capital Management
31 Workforce Compensation Administration

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. 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. 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 administer 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.
32 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:
<table>
<thead>
<tr>
<th>Refresh Option</th>
<th>Processing Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Refresh</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>Refresh HR Data</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>Refresh Base and Eligible Salary</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>Refresh Primary Manager Hierarchy</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>Refresh Secondary Manager Hierarchy</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>Refresh Other Reviewer Hierarchy</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>Reevaluate Eligibility</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>
</tbody>
</table>
### Refresh Option | Processing Description
--- | ---
Reevaluate Limited Eligibility | Refreshes the managers that have a status of **Limited**.
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
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>
<tbody>
<tr>
<td>1</td>
<td>Plan Details</td>
<td>Select the plan fundamentals:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cycle</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Action Reason</td>
</tr>
</tbody>
</table>
| 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.
<p>|        |                     | 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. |</p>
<table>
<thead>
<tr>
<th>Number</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Other Details</td>
<td>Define other details, as required. Select a specific manager hierarchy to process workers in that hierarchy. Build criteria, or use a formula, to include specific workers in the plan. You can even select workers that were approved to a certain level. Mark assignments as processed. If you select Yes, workers in that batch won't be processed again.</td>
</tr>
<tr>
<td>7</td>
<td>Submit Process</td>
<td>Submit your process.</td>
</tr>
</tbody>
</table>

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.

<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.

```sql
/* *******************************************/
```
FORMULA NAME : Compensation Selection Formula
FORMULA TYPE : Compensation Person Selection
DESCRIPTION: Assignment_id based selection fast formula
******************************************************************************
/%%%%%%%%%%%%%%%% INPUT VALUES DEFAULTS BEGIN =%%%%%%%%%%%%%%%%%%%%%%%%%%%*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)
/%%%%%%%%%%%%%%%% INPUT VALUES DEFAULTS ENDS%%%%%%%%%%%%%%%%%%%%%%%%%%%*/
/%%%%%%%%%%%%%%%% FORMULA SECTION BEGIN ===============================*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
l_selected = 'Y'
/* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/
if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
  (l_selected = 'N')
else
  (l_selected = 'Y')
RETURN l_selected
/%%%%%%%%%%%%%%%% FORMULA SECTION END ===============================*/

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
33 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>
<tr>
<td>Start Date</td>
<td>1/1/14</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/14</td>
</tr>
<tr>
<td>Sequence Number</td>
<td>1</td>
</tr>
<tr>
<td>Currency</td>
<td>US Dollar</td>
</tr>
<tr>
<td>Column 01</td>
<td>100,000</td>
</tr>
<tr>
<td>Column 02</td>
<td>132,000</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.
6. Expand **User-Defined Columns**.
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.
Field | Value
--- | ---
External Data Record Type | Fidelity 401K
External Data Column | Column 01

11. Click **OK** to return to the Configure Worksheet Page Layout page.
12. Enable **User-Defined Numeric Column 17**.
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.

| Field               | Value |
--- | --- |
External Data Record Type | Fidelity 401K |
External Data Column | Column 02 |

16. Click **OK** to return to the Configure Worksheet Page Layout page.
17. Click **Save and Close** to return to the Configure Worksheet Display page.
18. Click **Save and Close** to return to the Define Workforce Compensation page.
19. Click **Done** to return to the Manage Workforce Compensation Plans page.

### 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.

| Field      | Item One Value    | Item Two Value   |
--- | --- | --- |
Item Name | Beginning Balance | Ending Balance |
Source Type | External Data | External Data |
Record Type | Fidelity 401K | Fidelity 401K |
Column | Column 01 | Column 02 |
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
- External Data Lookups

## Import External Compensation Data in the Integrated Workbook

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

### Before You Start

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

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

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

### Generate the Workbook

Create the external data workbook in the Compensation work area.

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

### Enter External Data

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Item One Value</th>
<th>Item Two Value</th>
</tr>
</thead>
<tbody>
<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>

---
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
- 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.
34 Total Compensation Statement Overview

Guidelines to Create Total Compensation Statement Definitions

The statement definition acts as a template and determines the layout and content of the generated statement. The statement definition configures the display of compensation items added to compensation categories.

This topic explains:
- Statement definition approaches
- Reuse of statements and components
- Editing categories
- Statement display flexibility
- Iterative design process

Statement Definition Approaches
You can create statement definitions using either of the following approaches:
- Create the item and category components as you build the statement hierarchy.
- Define the item and category building block components first, and then associate them hierarchically.

The second approach promotes reuse of items and categories across multiple statements.

Reuse of Statements and Components
You can:
- Include multiple legal employers, multiple countries, and multiple currencies in one statement.
- Add compensation items with sources that belong to different legal employers.
- Use the same categories in multiple statements.
- Reuse statement definitions by adding new statement periods and then modify the definition for subsequent periods.
- Duplicate a definition as the starting point for other definitions.

Editing Categories
Edits to categories affect all statement definitions that use that category (as a category or subcategory). This applies whether you make the edits from the Manage Compensation Categories page or the Manage Statement Definitions page. Exception: Compensation category display names are local to the statement definition where you create or edit the name and don’t impact the compensation category.
Statement Display Flexibility

Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.

The optional summary page:

- Provides workers with high-level view of their total compensation in graphs and tables
- Displays summed totals of top-level categories included in monetary and nonmonetary sections

Viewers can drill down to detailed category pages from the summary page or use regional area navigation links, depending on how you configure the category.

Iterative Design Process

Configuring top-level compensation categories and statement definitions is an iterative process. You generate, view, purge, and regenerate your statements multiple times while editing category and statement definition and display options.
Create a Total Compensation Statement

Configure the design, content, and delivery of a total compensation statement that includes pay such as base pay, variable compensation, fringe benefits, cost of benefits, and paid time off. The following figure shows the construction of a total compensation statement and how it displays items and categories.

To construct a total compensation statement, application implementors and compensation administrators:

1. Define compensation items that map to sources of estimated or actual amounts paid to workers or costs incurred by the company.
2. Arrange compensation items into categories such as cash compensation, base pay, benefits, or company stock.
3. Assemble categories into statement definitions.
   - Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.
   - Display category details on a single page or enable recipients to drill to details in the statement.
   - Configure optional graphical displays of data, worker instructions, and supplemental information such as compensation policies or benefit plan details.
   - Define periods for which statement data is valid and add an optional welcome message for each period.

4. Configure settings that control statement availability and the default stock price and currency used for estimated values.

5. Generate statements for review by compensation manager.

6. Make statements available for workers to view.

7. Purge unneeded statements and monitor processes with summary and detailed online reports.

To define total compensation statements, use the Total Compensation Statements task list in the Compensation work area.

Related Topics
- Compensation Items and Sources
- Compensation Category Types
- Compensation Categories and Subcategories
- Best Practices for Planning Statement Definitions

Display Options in Statements

Options for Display and Layout of Total Compensation Statements

You have many options to control the layout and display of tables and categories in total compensation statements. Additional options control graphic displays, descriptive text, and supplemental information. In general, you configure display options for:

- Category detail pages during category setup
- Top-level categories and the summary page during statement definition setup

The following table describes and compares the display options available when creating or editing compensation categories and compensation statement definitions.

<table>
<thead>
<tr>
<th>Display Option</th>
<th>Category Setup</th>
<th>Statement Definition Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide table columns</td>
<td>Yes</td>
<td>Yes: summary page columns</td>
</tr>
<tr>
<td>Rename table columns</td>
<td>Yes</td>
<td>Yes: top-level categories only</td>
</tr>
<tr>
<td>Configure display of zero or no values</td>
<td>Yes</td>
<td>Yes: top-level categories only</td>
</tr>
<tr>
<td>Configure graph display</td>
<td>Yes</td>
<td>Yes: in summary page</td>
</tr>
<tr>
<td>Display Option</td>
<td>Category Setup</td>
<td>Statement Definition Setup</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>----------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Add descriptive text</td>
<td>Yes</td>
<td>Yes: in summary page</td>
</tr>
<tr>
<td>Add supplemental text</td>
<td>Yes</td>
<td>Yes: in summary page</td>
</tr>
<tr>
<td>Change vertical display order</td>
<td>Yes</td>
<td>Yes: in summary page</td>
</tr>
<tr>
<td>Hide regions for graphs or descriptions</td>
<td>Yes</td>
<td>Yes: in summary page</td>
</tr>
<tr>
<td>Exclude category from statement summary</td>
<td>No</td>
<td>Yes: top-level categories only</td>
</tr>
<tr>
<td>Hide or show estimated amount indicator</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Include and hide statement summary page</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Include and hide welcome message</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Select printable statement options</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Best Practices for Hiding Columns in a Statement

You can edit the column properties to hide a column in the category or statement summary page. When you hide a column, the data that the column would display isn't included in summary or detail tables or graphs.

Hiding Columns

You can hide:

- Unused or not applicable columns, such as the worker contribution column in a cash compensation category
- Description columns

You can show a category's row in the statement even when it contains only zero values. However, you should show at least the Description column and enter an explanation, otherwise viewers see only a row of zeros. You can't hide all columns in a category if you configure the category level of details to show all details on a single category overview page.
Options to Handle Display of Statement Categories When Zero or No Values Exist

When you design categories for a statement, you can decide how to handle display when a worker has zero or no values to display during the statement period. You design categories using the Manage Compensation Categories task.

**Contribution Values**
Zero or no values might occur when a worker:
- Didn't receive any stock options during the period
- Isn't participating in a compensation or benefit plan

The following table describes the zero or no value display options.

<table>
<thead>
<tr>
<th>Statement Element</th>
<th>Display Options When All Contribution Values are Zero or No Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top-level categories page</td>
<td>Do not display category if zero values or no values exist&lt;br&gt;Display category if values are zero; hide if no value exists&lt;br&gt;Always display the category page</td>
</tr>
<tr>
<td>Stock subcategory rows</td>
<td>Do not display row when no values exist or values are zeroes&lt;br&gt;Display row if values are zeroes and allow subcategory drill&lt;br&gt;Display and allow drill if historical values are over zero&lt;br&gt;Always display the row and prevent drilling to subcategory&lt;br&gt;Always display the row and allow drilling to subcategory</td>
</tr>
<tr>
<td>Items in categories</td>
<td>Do not display row when no values exist or values are zeroes&lt;br&gt;Display row if values are zeroes; hide if no values exist&lt;br&gt;Always display the row</td>
</tr>
</tbody>
</table>

If you decide to display the row or category page with zero or no values, you can optionally compose a statement message to:
- Explain the lack of values
- Call attention to missed opportunities, such as participation in a stock purchase plan
Options for Displaying Graphs in Total Compensation Statement

You can display up to two graphs for each category. If you include a summary page in the statement, you can also include up to two graphs each in the Monetary and Nonmonetary sections of the summary.

For each graph that you decide to display, you must specify:

- Graph type: Pie chart or various types of bar chart
- Columns included in the graph: Worker contributions, company contributions, or both.

Graphs: Restrictions

A graph must not include columns containing:

- Text or dates
- More than one nonmonetary unit of measure
- A combination of monetary and nonmonetary values

For example, a graph that mixes shares of stock, a company car, and fitness membership would not provide clear information.
### Total Compensation Statement Components

#### Compensation Items and Sources

Compensation items are the lowest level of compensation detail in the total compensation statement. Map each item to the specific source from which the statement retrieves compensation information. Items can hold monetary, nonmonetary, date, or text values. You can use them across statement definitions.

This topic explains the following significant aspects of compensation items:

- Source type
- Type of compensation and unit of measure
- Estimated values
- Rounding
- Relationship in the statement

#### Source Type

Using the Manage Compensation Items task, you map compensation items to the source of the compensation to retrieve the compensation information. This table describes the source types and special data entry requirements for each.

<table>
<thead>
<tr>
<th>Source Type</th>
<th>Description</th>
<th>Additional Data Entry Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Balance</td>
<td>Compensation such as data obtained from a legacy compensation application entered as a one-time benefit balance.</td>
<td>Type of Compensation</td>
</tr>
<tr>
<td>Element Entry</td>
<td>Compensation such as salary and bonus earnings retrieved from element entry whose pay period end dates fall within the statement period.</td>
<td>Legislative Data Group, Payroll Element, and Input Value</td>
</tr>
<tr>
<td>External Data</td>
<td>Compensation such as data internal to the organization from another system, or data from a third party supplier.</td>
<td>Record Type, Column, and Type of Compensation.</td>
</tr>
<tr>
<td>Formula</td>
<td>Create a formula to retrieve compensation information that isn't stored in the other predefined source types.</td>
<td>Type of Compensation, nonmonetary Unit of Measure, Rounding Rule, and Currency. (Formula unit or currency overrides item definition)</td>
</tr>
</tbody>
</table>
### Compensation Type and Unit of Measure

The compensation item inherits from the source:

- Default type of compensation, such as monetary or nonmonetary
- Monetary currency
- Nonmonetary unit of measure (UOM)

In some cases you can override the default compensation type and nonmonetary UOM when defining the item.

- If a formula that retrieves compensation also specifies currency or nonmonetary unit of measure, the formula configuration overrides the currency or unit selections in the item definition.
- The currency defined in the benefit balance overrides the currency on the item definition.

### Estimated Values

For each item, you can select the Estimated amount option to indicate that this compensation isn’t the actual amount paid. In the statement definition, you can specify whether to display the estimated amount indicator for amounts designated as estimated.

### Rounding

You can specify how to round nonmonetary amounts.

### Items in the Statement Hierarchy

You can’t add items to statement definitions directly. To include them on statements, you must add items to a compensation category.

### Related Topics

- Overview of Using Formulas
Formula Type for Total Compensation Item

The Total Compensation Item formula determines compensation information that isn't stored in the other predefined item source types. You select the formula when you manage compensation items on the Create or Edit Compensation Items page.

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 formula of this type.

<table>
<thead>
<tr>
<th>Input Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMP_IV_PERIOD_ID</td>
<td>Char</td>
<td>Y</td>
<td>Period ID</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_START_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Statement Period Start Date</td>
</tr>
<tr>
<td>CMP_IV_PERIOD_END_DATE</td>
<td>Date</td>
<td>Y</td>
<td>Statement Period End Date</td>
</tr>
</tbody>
</table>
Return Values

The following return variables are available to formula 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>COMPENSATION_ DATES</td>
<td>Date</td>
<td>Y</td>
<td>One to 15 transaction dates delimited by semicolon, maximum 250 characters.</td>
</tr>
<tr>
<td>VALUES</td>
<td>Char</td>
<td>Y</td>
<td>One to 15 transaction values delimited by semicolon, maximum 250 characters. Must be the same number of values as dates.</td>
</tr>
<tr>
<td>ASSIGNMENTS</td>
<td>Char</td>
<td>N</td>
<td>One to 15 transaction assignments delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).</td>
</tr>
<tr>
<td>LEGALEMPLOYERS</td>
<td>Char</td>
<td>N</td>
<td>One to 15 legal employer IDs delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).</td>
</tr>
<tr>
<td>COMPENSATION_ DATES1</td>
<td>Date</td>
<td>Y</td>
<td>Second variable for transaction dates from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>VALUES1</td>
<td>Char</td>
<td>Y</td>
<td>Second variable for transaction values from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>ASSIGNMENTS1</td>
<td>Char</td>
<td>N</td>
<td>Second variable for transaction assignments from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
<tr>
<td>LEGALEMPLOYERS1</td>
<td>Char</td>
<td>N</td>
<td>Second variable for legal employer IDs from 16 to 30 if limit of 250 characters is exceeded.</td>
</tr>
</tbody>
</table>
### Total Compensation Statement Components

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Data Type</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPENSATION_DATES2</td>
<td>Date</td>
<td>Y</td>
<td>Transaction dates from 31 to 45.</td>
</tr>
<tr>
<td>VALUES2</td>
<td>Char</td>
<td>Y</td>
<td>Transaction values from 31 to 45.</td>
</tr>
<tr>
<td>ASSIGNMENTS2</td>
<td>Char</td>
<td>N</td>
<td>Transaction assignments from 31 to 45.</td>
</tr>
<tr>
<td>LEGALEMPLOYERS2</td>
<td>Char</td>
<td>N</td>
<td>Legal employers from 31 to 45.</td>
</tr>
<tr>
<td>COMPENSATION_DATES3</td>
<td>Dates</td>
<td>Y</td>
<td>Transaction dates from 46 to 60.</td>
</tr>
<tr>
<td>VALUES3</td>
<td>Char</td>
<td>Y</td>
<td>Transaction values from 46 to 60.</td>
</tr>
<tr>
<td>ASSIGNMENTS3</td>
<td>Char</td>
<td>N</td>
<td>Transaction assignments from 46 to 60.</td>
</tr>
<tr>
<td>LEGALEMPLOYERS3</td>
<td>Char</td>
<td>N</td>
<td>Legal employers from 46 to 60.</td>
</tr>
</tbody>
</table>

#### Sample Formula

This sample formula returns one date and one value based on the worker ID.

```sql
/*================================*****/
FORMULA NAME : Total Compensation Simple Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns one date and one value.
*/

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date), CMP_IV_PERIOD_END_DATE (date)
DEFAULT FOR CMP_IV_PERSON_ID IS '-1'
DEFAULT FOR CMP_IV_PERIOD_START_DATE IS '4712/12/31' (date)
DEFAULT FOR CMP_IV_PERIOD_END_DATE IS '4712/12/31' (date)
/*============ INPUT VALUES DEFAULTS ENDS =====================*/

/*=================== FORMULA SECTION BEGIN =================*/

COMPENSATION_DATES = '2005/01/01'
VALUES = '500.00'
ASSIGNMENTS = to_char(get_context(HR_ASSIGNMENT_ID,-1))

RETURN COMPENSATION_DATES, VALUES, ASSIGNMENTS

/*================ FORMULA SECTION END =======================*/
```
This sample formula returns multiple variables.

```c
FORMULA NAME : Total Compensation Multi Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns multiple variables.

**************************************************************************

/*=========== INPUT VALUES DEFAULTS BEGIN =====================*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date) , CMP_IV_PERIOD_END_DATE (date)
/*=========== INPUT VALUES DEFAULTS ENDS =====================*/

/*================= FORMULA SECTION BEGIN =================*/

COMPENSATION_DATES = '2009/01/01;2009/02/01;2009/03/01'
COMPENSATION_DATES1 = '2009/07/01;2009/08/01;2009/09/01'
COMPENSATION_DATES2 = '2009/10/01;2009/11/01;2009/12/01'
COMPENSATION_DATES3 = '2009/10/01;2009/11/01;2009/12/01'
VALUES = '200.00;200.00;300.00'
VALUES1 = '300.00;500.00;500.00'
VALUES2 = '500.00;500.00;600.00'
VALUES3 = '600.00;600.00;700.00'

/* Returns only first two assignment */
ASSIGNMENTS = ';1234567890;1234567890'
ASSIGNMENTS1 = '1234567890;1234567890;1234567890'

/* Returns last two assignments */
ASSIGNMENTS2 = ';1234567890;1234567890'

/* Returns first and last assignments */
ASSIGNMENTS3 = '1234567890;;1234567890'

LEGALEMPLOYERS = '0123456789;;0123456789'
LEGALEMPLOYERS1 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS2 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS3 = '0123456789;0123456789'

RETURN

COMPENSATION_DATES,VALUES,COMPENSATION_DATES1,VALUES1,COMPENSATION_DATES2,VALUES2,COMPENSATION_DATES3,VALUES3,ASSIGNMENTS,ASSIGNMENTS1,ASSIGNMENTS2,ASSIGNMENTS3,LEGALEMPLOYERS,LEGALEMPLOYERS1,LEGALEMPLOYERS2,LEGALEMPLOYERS3

/*================ FORMULA SECTION END =======================*/
```

Compensation Category Types

The compensation category type determines the table columns and general layout of the category page in the total compensation statement, as well as whether the category can include subcategories. This topic explains the category types and provides an example of a user-defined category.
Types
The following table shows the category types with default column and configuration details.

<table>
<thead>
<tr>
<th>Category Type</th>
<th>Default Columns</th>
<th>Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Benefits</td>
<td>• Worker contributions</td>
<td>• Add compensation items</td>
</tr>
<tr>
<td>• Cash Compensation</td>
<td>• Employer contributions</td>
<td>• Nest categories within the category as subcategories</td>
</tr>
<tr>
<td>• Savings</td>
<td>• Description</td>
<td>• Hide columns that don’t apply</td>
</tr>
<tr>
<td>• Retirement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Off</td>
<td>• Type of time off</td>
<td>• Edit column labels</td>
</tr>
<tr>
<td></td>
<td>• Monetary value of the time off</td>
<td>• Configure category table row names as links to more information</td>
</tr>
<tr>
<td></td>
<td>• Accrued balance</td>
<td>• Can’t nest categories as subcategories</td>
</tr>
<tr>
<td>Stock History</td>
<td>Up to 27 columns of data from the database table that stores workers’ stock</td>
<td>• Select which types of stock to include in the category</td>
</tr>
<tr>
<td></td>
<td>details</td>
<td>• Alter which columns are hidden or only available optionally in statement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>view menu</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Edit column labels</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can’t nest categories as subcategories</td>
</tr>
<tr>
<td>Other</td>
<td>Same basic structure as the Cash Compensation or Benefits category type</td>
<td>You can use it for any type of compensation</td>
</tr>
<tr>
<td>User-Defined</td>
<td>Specify the number of columns, up to five, that you want to include in the</td>
<td>• Configure column labels</td>
</tr>
<tr>
<td></td>
<td>category</td>
<td>• Select compensation items for the table rows</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can’t nest categories as subcategories</td>
</tr>
</tbody>
</table>

User-Defined Category Example
You might use the user-defined category type to display information about commissions by including columns, such as:

• Sales target
• Units sold
• Percentage over target
• Percentage under target
• Commission amount
Compensation Categories and Subcategories

Compensation categories display information in tables. Use categories to group similar or related compensation items, such as Cash Compensation, Benefits, Time Off, or Stock History. You can use the same categories in multiple statements. You can also display categories directly on the summary page, or nest them to make subcategories.

Consider the following factors when planning how to group compensation items and categories for display:

- Category type
- Contribution type and unit of measure
- Level of detail

Category Type

Consider these points:

- Category type determines the table columns and general layout of the page in the statement.
- You can't add categories as subcategories to the Stock History, User-Defined, or Time Off category types.
- After you use a category in any statement, you can't change the category type.

Contribution Type and Unit of Measure

The contribution type and unit of measure of the associated items or subcategories determines:

- Category's contribution type (monetary or nonmonetary)
- Category's nonmonetary unit of measure

All items and subcategories within a nonmonetary category must share the same unit of measure.

Level of Detail

When you create a category, you specify how you want to display the category details in the statement.

Select one of these level of detail values:

- Viewers drill into line items to see details
- Viewers see all details on one page

Related Topics

- Best Practices for Hiding Columns in a Statement
- Options to Handle Display of Statement Categories When Zero or No Values Exist
- Options for Displaying Graphs in Total Compensation Statement
Options to Display Category Details in a Compensation Statement

Use the Manage Compensation Categories task in the Compensation work area to specify how to display the category details in the statement. Select from two level of display options, depending on category type and design preference.

Viewers Drill Into Line Items to See Details
Provide links from a high-level category page that drill down to specific details for each item or subcategory row in the category.

Example: You can create a Benefits category that displays high-level information for different health benefits, such as:
- Medical
- Dental
- Life Insurance

To see the details of each row in the category, such as medical, viewers can drill into the row to a separate details page.

Viewers See All Details on One Page
Display the full detail of the category's content on a single page in the statement. For example, you can create a Bonus category that displays the amount of different bonuses (such as new hire and quarterly) as rows on the category page.

If you select to show all details on a single page:
- The name column doesn't show in the statement for rows in the category.
- You can't hide all columns in the category.
- You can't add subcategories to these category types: Benefits, Cash Compensation, Savings and Retirement, or Other. However, you can add subcategories to these category types if the level of detail enables drilling to see details.

It's best not to show all details on a single page for recurring information.

Best Practices for Planning Statement Definitions

Consider these statement elements and options when you plan how many different total compensation statement definitions to create and the presentation of content in each:
- Statement audience
- Statement definition details
- Statement periods
Statement Audience
You can create different statement definitions for different statement audiences. Use the following two methods, individually or in combination, to limit the statement audience:

- Attach an eligibility profile to the statement on the Statement Options tab.
  
  Example: Within a business unit, you create separate statement definitions for individual contributors and executive level workers by:
  
  a. Creating eligibility profiles that differentiate between individual contributors and executive workers.
  b. Attaching each eligibility profile to the corresponding statement definition.

- Use the following population filter parameters to specify your audience when you generate statements:
  
  o Business unit
  o Benefits group
  o Legislative data group
  o Country
  o A person selection formula that you define
  o A single person that you select

Statement Definition Details
Build the statement hierarchy of categories and items appropriate for the audience. Configure table and graphical displays, descriptive text, and supplemental information.

Statement Periods
Configure statements to cover any period of time by specifying start and end dates on the statement definition Periods tab. You can create multiple periods at one time. For each statement period, further specify:

- An optional statement period display name
  
  Example: Name the period 2011 Annual Statement rather than the default display of start and end date.

- The date that statements become available to workers

- The conversion rate date for currency conversions

- An optional welcome message.

Total Compensation Statement Options
You can configure an optional summary page, estimated amount indicator, and welcome message for each statement.
Summary Page
On the statement definition Options tab, you can configure the summary page. The optional summary page consists of the following optional features:

- Monetary and Nonmonetary sections, each containing section-level descriptive text, graphs, and tables
- Summary page descriptive text that can include rich text formatting and hyperlinks
  
  Include placeholder fields for values that vary among workers, such as the first name, a compensation item amount, or work location. These placeholder fields enable you to use the same text for different workers.
- Summary page supplemental information, such as hyperlinks to company policies and resources, which are displayed in a separate window

If you include a graph in the Nonmonetary section, all top-level categories in the nonmonetary summary should share the same unit of measure. You can exclude individual top-level categories from the summary.

Estimated Amount Indicator
Displaying an estimated amount indicator in the statement requires two configuration steps:

- Item definition: When creating compensation items, identify whether the item amounts are estimates.
- Statement definition: On the statement definition Options tab, specify whether to display or hide the indicator that visually denotes amounts as estimated.

Welcome Message
For each statement period, you can compose an optional welcome message on the statement definition Periods tab. In the welcome message you can:

- Personalize the greeting with each worker’s name
- Use rich text and include hyperlinks
- Include placeholder fields for values that vary among workers, such as the first name, a compensation item amount, or work location. These placeholder fields enable you to use the same text for different workers.

If included, the welcome message is the first page the worker sees in the statement.

Options to Include Descriptive Text in Compensation Statements
You can include descriptive text in the Welcome, Summary, and Descriptive Text sections of total compensation statements. You can also insert fields into your descriptive text that act as placeholders. When you generate statements for your workers, these fields are replaced with the actual values for each worker.

For example, you can insert the <FIRST_NAME> field, which the generate process then replaces with the worker's first name, such as Marie. Or, you use descriptive text to inform the employee of company-specific information, such as company policies.
Here’s a list of fields you can insert as part of the descriptive text. You can access these fields from the Insert Field menu on the Descriptive Text tab.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Name</td>
<td>Name information, such as &lt;FIRST NAME&gt;, &lt;MIDDLE NAME&gt;, and &lt;LAST NAME&gt;.</td>
</tr>
<tr>
<td>Employment</td>
<td>Location information, such as &lt;DEPARTMENT&gt;, &lt;BUSINESS UNIT&gt;, and &lt;EMPLOYER&gt;.</td>
</tr>
<tr>
<td></td>
<td>Job information such, as &lt;JOB&gt;, &lt;GRADE&gt;, and &lt;POSITION&gt;.</td>
</tr>
<tr>
<td>Compensation Item</td>
<td>Compensation item information, such as bonus or car allowance.</td>
</tr>
<tr>
<td></td>
<td>For example, you can select the &lt;BONUS&gt; compensation item.</td>
</tr>
<tr>
<td>Conditional Text</td>
<td>Compensation item information that appears when it meets the conditions that you create.</td>
</tr>
<tr>
<td></td>
<td>For example, you can build the following condition to show the annual salary derived from the monthly salary: &lt;Most recent [Pay Monthly] * 12 Is not blank) Or (Sum[Pay Monthly] Is not blank)&gt;.</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>Date information, such as &lt;STATEMENT START DATE&gt; and &lt;STATEMENT END DATE&gt;</td>
</tr>
</tbody>
</table>

You can reuse the rich text fields that you define, such as items and conditional text, across your statement definitions.

Options to Configure Statement Periods and Welcome Message

Using the Statement Definitions Periods tab, you configure statement periods and an optional welcome message for each statement.

Statement Periods
Configure statements to cover any period of time by specifying start and end dates on the Periods tab. You can create multiple periods at one time.

For each statement period, further specify:

- An optional statement period display name
  Example: Name the period 2016 Annual Statement rather than the default display of start and end date.
- The date that statements become available to workers
- The conversion rate date for currency conversions
- An optional welcome message
Welcome Message
For each statement period, you can compose an optional welcome message by clicking the Welcome Message button on the Periods tab. If included, the welcome message is the first page the worker sees in the statement.
In the welcome message you can:
  • Personalize the greeting with each worker's name
  • Use rich text and include hyperlinks

Options to Configure Statement Eligibility and Summary Page
On the Statement Definition Statement Options tab, configure an optional summary page, eligibility profile, and visibility of the estimated amount indicators.

Summary Page
Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.
The optional summary page provides workers with a high-level view of their total compensation in monetary and nonmonetary sections. Viewers can drill down to detailed category pages from the summary page or use regional area navigation links, depending on how you configure the category.
On the Statement Options tab, configure the following optional features of the summary page:
  • Monetary and Nonmonetary sections, each containing section-level descriptive text, graphs, and tables
  • Summary page descriptive text that can include rich text formatting and hyperlinks
  • Summary page supplemental information, such as hyperlinks to company policies and resources, which are displayed in a separate window

Tip: If you include a graph in the Nonmonetary section, all top-level categories in the nonmonetary summary should share the same unit of measure. You can exclude individual top-level categories from the summary.

Eligibility Profile
Attach an eligibility profile to limit the audience of the statement. The eligibility profile works as a further refinement to statement generation process parameters, such as business unit or legislative data group.
Example: Within a business unit, you create separate statement definitions for individual contributors and executive-level workers by:
1. Creating eligibility profiles that differentiate between individual contributors and executive workers.
2. Attaching each eligibility profile to the corresponding statement definition.
3. Selecting the Business Unit parameter when generating either statement.
Estimated Amount Indicator
Displaying an estimated amount indicator in the statement requires two configuration steps:
- Item definition: When creating compensation items, identify whether the item amounts are estimates.
- Statement definition: On the Statement Options tab, specify whether to display or hide the indicator that visually denotes amounts as estimated.

FAQs

How can I change whether the category displays zero or no values in the statement?
Edit the top-level category only on the Edit Statement Definition page. Or, edit the subcategory and item rows on the Edit Compensation Categories page. Follow these steps:
1. Select the category or item row.
2. Select the zero value display option in the Actions menu.
The Display Zero Rows column shows the current setting for each category.

How can I display a hidden column?
Edit the summary table column properties only on the summary page. Or, edit each individual category’s column properties on the Edit Compensation Category page. Follow these steps:
1. Click the Column Properties button.
2. Select the column from the menu.
3. Update the option to display the column in the statement.

How can I hide or show the welcome message in total compensation statements?
Follow these steps using the Manage Statement Definitions task in the Compensation work area:
1. Select the statement definition and click Edit.
2. On the Periods tab, select the button in the Welcome Message column.
3. Edit the Do not display welcome message option.
How can I change welcome message text in total compensation statements?

Follow these steps using the Manage Statement Definitions task in the Compensation work area:

1. Select the statement definition and click Edit.
2. On the Periods tab, select the Edit button in the Welcome Message column.

Why can't I delete or edit some items?

If the item is in use in a compensation category, you can't delete it. Also, you can't edit some attributes, such as the type of compensation and nonmonetary unit of measure.

Why did the default stock details change?

More than one administrator might have access to these settings. The following tasks use the stock price and currency information:

- View compensation history
- Manage workforce compensation
- Generate total compensation statements

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

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

Can I reuse a previous year's statement?

Yes. You can reuse an existing statement definition by adding new periods. You might also want to:

- Update the welcome message
- Add or edit the items and categories included
- Hide or update the display of graphs, descriptive text, and supplementary information

Can I correct the definition after workers received statements?

Yes. You can correct the statement definition and regenerate the statements, which makes the newer version available to workers.
What's the difference between workforce compensation statements and total compensation statements?

Workforce compensation statements show recent changes to base and variable pay. They consist of statement groups composed of RTF statement templates. The content of the change statements is based on the associated workforce compensation plan. Create these statements using the Configure Compensation Change Statements task in the Compensation work area when you set up a workforce compensation plan.

Total compensation statements show base and variable pay, fringe benefits, and prerequisites for a specified period of time, typically a year. They consist of statement definitions composed of items and categories. The total compensation statement is available both online and in PDF format. Create these statements using the Total Compensation Statement tasks in the Compensation work area.
36  Total Compensation Examples

Create a Bonus Category

This example demonstrates how to create a bonus category that includes a profit sharing bonus, a new hire bonus, and a quarterly bonus. The new hire and quarterly bonus items already exist and are reused in this category.

The following table summarizes key decisions for the Profit Sharing compensation item in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Item in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What compensation does the item represent?</td>
<td>Profit sharing bonus</td>
</tr>
<tr>
<td>What's the source type?</td>
<td>Payroll element</td>
</tr>
<tr>
<td>What's the legislative data group?</td>
<td>USA</td>
</tr>
</tbody>
</table>

The following table summarizes key decisions for the category in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Category in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What's the category type?</td>
<td>Cash Compensation</td>
</tr>
<tr>
<td>Display category details in the statement at what level?</td>
<td>Viewers see all details on one page.</td>
</tr>
<tr>
<td>Add items?</td>
<td>Yes: Profit sharing bonus, new hire bonus, and quarterly bonus.</td>
</tr>
<tr>
<td>Hide or edit any columns in the category?</td>
<td>Hide worker contributions because this is a cash compensation category. Edit company contribution column name to make it familiar to workers.</td>
</tr>
</tbody>
</table>
Task Summary

To create the bonus category, complete the following tasks. Use the default values except where otherwise indicated.

1. Create a profit sharing bonus item.
2. Create a bonus category.
3. Attach the item you created along with other existing bonus items.
4. Configure display options.

Prerequisites

1. Create a payroll element named Profit Sharing Bonus using the USA legislative data group.
2. Create the following compensation items using payroll elements in the USA legislative data group:
   - New Hire Bonus
   - Quarterly Bonus

Creating a Compensation Item

Create the compensation item.

1. Click the Manage Compensation Items task.
2. Click Create.
3. Complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Name</td>
<td>Profit Sharing Bonus</td>
</tr>
<tr>
<td>Source Type</td>
<td>Element entry</td>
</tr>
<tr>
<td>Legislative Data Group</td>
<td>USA</td>
</tr>
<tr>
<td>Payroll Element</td>
<td>Profit Sharing Bonus</td>
</tr>
<tr>
<td>Input Value</td>
<td>Pay Value</td>
</tr>
</tbody>
</table>

4. Click Save and Close.
Entering Category Details and Adding Items

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Bonus</td>
</tr>
<tr>
<td>Category Type</td>
<td>Cash Compensation</td>
</tr>
</tbody>
</table>

4. Click **Continue**.
5. Select **Viewers see all details on one page** in the **Level of Detail** field.
6. Click **Add Items** three times to add three new rows.
7. Complete the fields for each new row as shown in this table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Company Contribution (Items)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profit Sharing</td>
<td>Profit Sharing Bonus</td>
<td>Profit Sharing Bonus</td>
</tr>
<tr>
<td>New Hire</td>
<td>New Hire Bonus</td>
<td>New Hire Bonus</td>
</tr>
<tr>
<td>Quarterly</td>
<td>Quarterly Bonus</td>
<td>Quarterly Bonus</td>
</tr>
</tbody>
</table>

8. Click **Edit Column Properties** and select the **Your Contribution** column.
9. Select **Do not display in the statement**.
10. Click **OK**.
11. Click **Edit Column Properties** and select the **Company Contribution (Items)** column.
12. Enter **Amount** in the **Column Label** field.
13. Click **OK**.

Configuring Display Options.

1. Select the **Graphs** tab.
2. Complete the fields for two graphs, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value for the First Graph</th>
<th>Value for the Second Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graph Title</td>
<td>Your Bonuses</td>
<td>How Your Bonuses Add Up</td>
</tr>
</tbody>
</table>
Create a Benefits Category

This example demonstrates how to create a benefits category that includes medical, dental, vision, disability insurance, and life insurance. The following table summarizes key decisions for the compensation items in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>First Item</th>
<th>Second Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>What compensation does the item represent?</td>
<td>Worker contribution for medical benefit</td>
<td>Company contribution for medical benefit</td>
</tr>
<tr>
<td>What is the source type?</td>
<td>Payroll element</td>
<td>Payroll element</td>
</tr>
<tr>
<td>What is the legislative data group?</td>
<td>USA</td>
<td>USA</td>
</tr>
</tbody>
</table>

The following table summarizes key decisions for the category in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Category in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the category type?</td>
<td>Benefits</td>
</tr>
<tr>
<td>Display category details in the statement at what level?</td>
<td>Display details of item rows on separate pages that viewers drill to for details.</td>
</tr>
<tr>
<td>Add items? (Describe)</td>
<td>Yes: Both worker and company contributions for medical, dental, vision, disability insurance, and life insurance benefits.</td>
</tr>
<tr>
<td>Decision to Consider</td>
<td>Category in This Example</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>Add other categories as subcategories? Describe</td>
<td>No</td>
</tr>
<tr>
<td>Display graphs? (No or Yes?) One or two? What type?</td>
<td>Yes. Two: Stacked bar and pie chart.</td>
</tr>
<tr>
<td>Hide or edit any columns in the category?</td>
<td>No</td>
</tr>
<tr>
<td>Display the row if values are zero in the period?</td>
<td>No</td>
</tr>
</tbody>
</table>

Create items for medical insurance, then create a benefits category and attach the items you created along with eight existing benefits items and configure display options. Use the default values except where otherwise indicated.

**Prerequisites**

1. Create the following payroll elements using the USA legislative data group.
   - Medical Worker Contribution
   - Medical Company Contribution
2. Create the following compensation items using payroll elements in the USA legislative data group:
   - Dental Worker Contribution
   - Dental Company Contribution
   - Vision Worker Contribution
   - Vision Company Contribution
   - Disability Worker Contribution
   - Disability Company Contribution
   - Life Insurance Worker Contribution
   - Life Insurance Company Contribution

**Creating a Compensation Item**

Use the default values except where indicated.

1. In the Compensation work area, click **Manage Compensation Items** to open the Manage Compensation Items page.
2. Click **Create**.
3. On the Create Compensation Item page, complete the fields as shown in this table:
### Total Compensation Examples

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Name</td>
<td>Medical Worker Contribution</td>
</tr>
<tr>
<td>Source Type</td>
<td>Element entry</td>
</tr>
<tr>
<td>Legislative Data Group</td>
<td>USA</td>
</tr>
<tr>
<td>Payroll Element</td>
<td>Medical Worker Contribution</td>
</tr>
<tr>
<td>Input Value</td>
<td>Pay Value</td>
</tr>
</tbody>
</table>

4. Click **Save and Create Another**.

5. On the Create Compensation Item page, complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Name</td>
<td>Medical Company Contribution</td>
</tr>
<tr>
<td>Source Type</td>
<td>Element entry</td>
</tr>
<tr>
<td>Legislative Data Group</td>
<td>USA</td>
</tr>
<tr>
<td>Payroll Element</td>
<td>Medical Company Contribution</td>
</tr>
<tr>
<td>Input Value</td>
<td>Pay Value</td>
</tr>
</tbody>
</table>

6. Click **Save and Close**.

### Entering Category Details and Adding Items

1. In the Compensation work area, click **Manage Compensation Categories** to open the Manage Compensation Categories page.
2. Click **Create**.
3. On the Create Compensation Categories page, complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Benefits</td>
</tr>
</tbody>
</table>
4. Click Continue.
5. On the Create Category page, Table tab, select Viewers drill into line items to see details in the Level of Detail field.
6. Click Add Items five times to add five new rows.
7. Complete the fields for each new row, entering a name and description of the category row and selecting compensation items for each contribution column in the category, as shown in this table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Your Contribution (Items)</th>
<th>Company Contribution (Items)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Amounts reflect your coverage.</td>
<td>Medical Worker Contribution</td>
<td>Medical Company Contribution</td>
</tr>
<tr>
<td>Dental</td>
<td>Amounts reflect your coverage.</td>
<td>Dental Worker Contribution</td>
<td>Dental Company Contribution</td>
</tr>
<tr>
<td>Vision</td>
<td>Amounts reflect your coverage.</td>
<td>Vision Worker Contribution</td>
<td>Vision Company Contribution</td>
</tr>
<tr>
<td>Disability Insurance</td>
<td>LTD provides income protection.</td>
<td>Disability Worker Contribution</td>
<td>Disability Company Contribution</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>Life insurance is a core benefit.</td>
<td>Life Insurance Worker Contribution</td>
<td>Life Insurance Company Contribution</td>
</tr>
</tbody>
</table>

Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value for the First Graph</th>
<th>Value for the Second Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graph Title</td>
<td>Employee Versus Company Contributions</td>
<td>Total Contribution Comparison</td>
</tr>
<tr>
<td>Graph Type</td>
<td>Bar</td>
<td>Pie</td>
</tr>
<tr>
<td>Graph Items</td>
<td>Your Contribution, Company Contribution</td>
<td>Your Contribution, Company Contribution</td>
</tr>
</tbody>
</table>
Create a User-Defined Category for Commissions

This example demonstrates how to create a Commissions category using the User-Defined category type. The following table summarizes key decisions for the category in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Category in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the category type?</td>
<td>User-Defined</td>
</tr>
<tr>
<td>Display category details in the</td>
<td>Viewers see all details on one page.</td>
</tr>
<tr>
<td>statement at what level?</td>
<td></td>
</tr>
<tr>
<td>Add items?</td>
<td>Yes: Sales target, sales revenue, and commissions items for</td>
</tr>
<tr>
<td>year end.</td>
<td>years end.</td>
</tr>
<tr>
<td>Display graphs? How many? What type?</td>
<td>Yes. Two bar charts, one for revenue generated and one for</td>
</tr>
<tr>
<td></td>
<td>commissions earned.</td>
</tr>
<tr>
<td>Hide or edit any columns in the</td>
<td>Edit column labels.</td>
</tr>
<tr>
<td>category?</td>
<td></td>
</tr>
</tbody>
</table>

Task Summary

To create the user-defined category for commissions complete the following tasks. Use the default values except where otherwise indicated.

1. Create a User-Defined category.
2. Attach existing compensation items.
3. Configure display options.
Prerequisites

1. Create the following compensation items:
   - Sales Target Year End
   - Sales Revenue Year End
   - Commission Year End

Entering Category Details and Adding Items

1. Click the Manage Compensation Categories task.
2. Click Create.
3. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Commissions</td>
</tr>
<tr>
<td>Category Type</td>
<td>User-Defined</td>
</tr>
<tr>
<td>Number of Item Columns</td>
<td>3</td>
</tr>
</tbody>
</table>

4. Click Continue.
5. Select Viewers see all details on one page in the Level of Detail field.
6. Click Edit Column Properties and select the Your Contribution column.
7. Enter Sales Target in the Column Label field.
8. Click OK.
9. Click Edit Column Properties and select the Company Contribution column.
10. Enter Sales Revenue in the Column Label field.
11. Click OK.
12. Click Edit Column Properties and select the User-Defined Column 3 column.
13. Enter Commission in the Column Label field.
14. Click OK.
15. Click Add Items.
16. Complete the fields for the new row, as shown in this table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Sales Target (Item)</th>
<th>Sales Revenue (Item)</th>
<th>Commission (Item)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Row 1</td>
<td>Year End Activity</td>
<td>Sales Target Year End</td>
<td>Sales Revenue Year End</td>
<td>Commission Year End</td>
</tr>
</tbody>
</table>
The Name column doesn’t show in the statement when the level of detail is configured to display all details on a single page.

Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value for the First Graph</th>
<th>Value for the Second Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graph Title</td>
<td>Revenue Generated</td>
<td>Commissions Earned</td>
</tr>
<tr>
<td>Graph Type</td>
<td>Bar</td>
<td>Bar</td>
</tr>
<tr>
<td>Graph Items</td>
<td>Sales Revenue</td>
<td>Commissions</td>
</tr>
</tbody>
</table>

3. Click Save.
4. Click OK in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what’s included in this category or details about policies, and format it appropriately.
7. Click Reorder Components at the top of the page.
8. Select Descriptive Text and click the downward arrow until Descriptive Text appears below Graphs.
9. Click OK.
10. Click Save and Close.

Create a Stock History Category

This example demonstrates how to create a stock history category for nonqualified stock options with vesting information. You create a stock history category and configure column visibility and graphs.

The following table summarizes key decisions for the category in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Category in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What’s the category type?</td>
<td>Stock History</td>
</tr>
<tr>
<td>Display category details in the</td>
<td></td>
</tr>
<tr>
<td>statement at what level?</td>
<td>Viewers see all details on one page.</td>
</tr>
</tbody>
</table>
Decision to Consider | Category in This Example
--- | ---
Hide or edit any columns in the category? | Accept most default column visibility settings. Make some adjustments to visibility of vested share columns and grant number. Edit some column labels for display on the statement.

**Task Summary**

To create the stock history category, complete the following tasks:

1. Create a stock history category and configure the columns.
2. Configure the display options.

The Stock Details table must contain stock data. Use the default values except where otherwise indicated.

**Entering Category Details and Configuring Columns**

1. Click the Manage Compensation Categories task.
2. Click Create.
3. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Stock History</td>
</tr>
<tr>
<td>Category Type</td>
<td>Stock History</td>
</tr>
</tbody>
</table>

4. Click Continue.
5. Select Non-Qualified Stock Option in the Grant Type field.
6. Edit the column labels and availability of column types, as shown in this table, using the default values of columns not listed.

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Column Type</th>
<th>Column Label</th>
<th>Available for Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Original Grant Date</td>
<td>Grant Date</td>
<td>(Use default)</td>
</tr>
<tr>
<td>3</td>
<td>Grant Number</td>
<td>(Use default)</td>
<td>Select</td>
</tr>
<tr>
<td>10</td>
<td>Original Value at Grant</td>
<td>Grant Value</td>
<td>(Use default)</td>
</tr>
<tr>
<td>16</td>
<td>Estimated Market Value of Total Shares</td>
<td>Estimated Market Value</td>
<td>(Use default)</td>
</tr>
</tbody>
</table>
### Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value for the First Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graph Title</td>
<td>Vested Versus Unvested Shares</td>
</tr>
<tr>
<td>Graph Type</td>
<td>Bar</td>
</tr>
<tr>
<td>Nonmonetary Graph Items</td>
<td>Vested Shares, Unvested Shares</td>
</tr>
</tbody>
</table>

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

### Create a Total Compensation Statement

This example demonstrates how to create, generate, and view a total compensation statement that contains two top-level categories, one for cash compensation and one for stock. The statement definition is for individual contributors whose salaries are quoted on an annual basis. The categories added as subcategories were created for other statement definitions and are reused in this definition. The following table summarizes key decisions for the compensation item in this scenario.
Decision to Consider | Item in This Example
--- | ---
What compensation does the item represent? | Base pay for exempt workers with annual salary
What's the source type? | Payroll element
What's the legislative data group? | USA

The following table summarizes key decisions for the categories in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Cash Compensation Category</th>
<th>Stock Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the category type?</td>
<td>Cash Compensation</td>
<td>Other</td>
</tr>
<tr>
<td>Display category details in the statement at what level?</td>
<td>Display details of item and subcategory rows on separate pages that viewers drill to for details.</td>
<td>Display details of item and subcategory rows on separate pages that viewers drill to for details.</td>
</tr>
<tr>
<td>Add items?</td>
<td>Yes: Base pay for exempt workers</td>
<td>Not directly, only through subcategories.</td>
</tr>
<tr>
<td>Add other categories as subcategories?</td>
<td>Yes. One: Bonuses Exempts</td>
<td>Yes. Two: ESPP Exempts and Stock History Exempts</td>
</tr>
<tr>
<td>Display graphs? How many? What type?</td>
<td>Yes. Two: Bar and stacked bar.</td>
<td>No</td>
</tr>
<tr>
<td>Hide or edit any columns in the category?</td>
<td>Hide worker contributions because this is a cash compensation category. Edit subcategory names to make them familiar to workers.</td>
<td>Edit subcategory names to make them familiar to workers.</td>
</tr>
<tr>
<td>Display the row if values are zero or no in the period?</td>
<td>No</td>
<td>Display the Employee Stock Purchase Plan row but prevent drilling to details.</td>
</tr>
</tbody>
</table>

The following table summarizes key decisions for the statement definition in this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Statement Definition in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include which top-level categories?</td>
<td>Cash Compensation and Stock</td>
</tr>
<tr>
<td>What is the statement period?</td>
<td>Calendar year 2015</td>
</tr>
<tr>
<td></td>
<td>Also create a second annual period to be ready for the next year.</td>
</tr>
</tbody>
</table>
### Table: Decision to Consider vs. Statement Definition in This Example

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>Statement Definition in This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include welcome message?</td>
<td>Yes. Address recipients by first name.</td>
</tr>
<tr>
<td>Include summary page?</td>
<td>Yes</td>
</tr>
<tr>
<td>What is the statement audience for eligibility?</td>
<td>Individual contributors whose salaries are quoted on an annual basis</td>
</tr>
<tr>
<td>What is the population for statement generation?</td>
<td>Legal employer: Infusion USA</td>
</tr>
</tbody>
</table>

### Task Summary

To create, generate, and view a total compensation statement complete the following tasks. Use the default values except where otherwise indicated.

1. Create a compensation item.
2. Create a cash compensation category and add the item and a subcategory.
3. Create a stock category and add subcategories.
4. Create a statement definition.
5. Configure optional eligibility and statement summary page.
6. Generate and view statements.

### Prerequisites

1. Create a payroll element named **Base Pay Exempts** that represents base pay earnings for salaried exempt workers in the USA legislative data group.
2. Create the following compensation categories with items:
   - Bonuses Exempts
   - ESPP Exempts
   - Stock History
3. Create an eligibility profile named **IC Annual Salary** that identifies individual contributors who are salaried with annual salary basis.

### Creating a Compensation Item

Create the compensation item.

1. Click the **Manage Compensation Items** task.
2. Click **Create**.
3. Complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Name</td>
<td>Base Pay Exempts</td>
</tr>
<tr>
<td>Source Type</td>
<td>Element entry</td>
</tr>
<tr>
<td>Legislative Data Group</td>
<td>USA</td>
</tr>
<tr>
<td>Payroll Element</td>
<td>Base Pay Exempts</td>
</tr>
<tr>
<td>Input Value</td>
<td>Pay Value</td>
</tr>
</tbody>
</table>

4. Click **Save and Close**.

Creating a Cash Compensation Category

Create a cash compensation category and attach the base pay item you created along with two existing cash categories with items.

1. Enter category details and add an item.
2. Add and configure subcategories.
3. Configure display options.

1. Enter category details and add an item.

   1. Click the **Manage Compensation Categories** task.
   2. Click **Create**.
   3. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Cash Compensation</td>
</tr>
<tr>
<td>Category Type</td>
<td>Cash Compensation</td>
</tr>
</tbody>
</table>

4. Click **Continue**.
5. Select **Viewers drill into line items to see details** in the **Level of Detail** field.
6. Click **Add Items**.
7. Complete the column fields in the new row, as shown in this table.
### Total Compensation Examples

<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Salary</td>
</tr>
<tr>
<td>Description</td>
<td>Base pay amounts</td>
</tr>
<tr>
<td>Company Contribution</td>
<td>Base Pay Exempts</td>
</tr>
</tbody>
</table>

8. Click **Edit Column Properties** and select the **Your Contribution** column.
9. Select **Do not display in the statement**.
10. Click **OK**.
11. Click **Edit Column Properties** and select the **Company Contribution** column.
12. Enter **Amount** in the **Column Label** field.
13. Click **OK**.

2. **Add and configure a subcategory.**

1. Click **Add Subcategory**.
2. Select **Bonuses Exempts**.
3. Click **Apply**.
4. Click **Done**.
5. Complete the fields, as shown in this table, for the new category row.

<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Bonuses</td>
</tr>
<tr>
<td>Description</td>
<td>Lump sum compensation amounts</td>
</tr>
</tbody>
</table>

6. Click **Save**.
7. Click **OK**.

3. **Configure display options.**

1. Select the **Graphs** tab.
2. Complete the fields for two graphs, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value for Graph 1</th>
<th>Value for Graph 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graph Title</td>
<td>Your Cash Awards</td>
<td>Total Cash Compensation</td>
</tr>
</tbody>
</table>
Creating a Stock Category

Create a stock category and attach two existing stock categories with items.

1. Enter category details.
2. Add and configure subcategories.
3. Configure display options.

1. Enter category details.

1. Click Create.
2. Complete the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Name</td>
<td>Stock Awards</td>
</tr>
<tr>
<td>Category Type</td>
<td>Other</td>
</tr>
</tbody>
</table>

3. Click Continue.
4. Select Viewers drill into line items to see details in the Level of Detail field.

2. Add and configure subcategories.

1. Click Add Subcategory.
2. Select the row for ESPP Exempts.
3. Hold down the Control key and select the Stock History Exempts row.
4. Click Done.

3. Configure display options.
   1. Edit the subcategory names as shown in this table:

<table>
<thead>
<tr>
<th>Column</th>
<th>Stock History Category</th>
<th>ESPP Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Stock Options</td>
<td>Employee Stock Purchase Plan</td>
</tr>
</tbody>
</table>

2. Click Edit Column Properties and select the Company Contributions column.
3. Change the column label to Stock Award.
4. Click OK.
5. Select the Employee Stock Purchase Plan row.
6. On the Action menu, select Configure Zero or No Value Behavior of Row.
7. Complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero Contributions Display</td>
<td>Always display the row</td>
</tr>
<tr>
<td>Alert Message</td>
<td>Enter any text to display when workers have no stock to display.</td>
</tr>
</tbody>
</table>

8. Click OK.
9. Click Save and Close.

Creating a Statement Definition

Create a statement definition and configure the statement table display, periods, and welcome message.

1. Enter statement details and add top-level categories.
2. Configure table display options.
3. Define statement periods and welcome message.

1. Enter statement details and add top-level categories.
   1. Click the Manage Statement Definitions task.
   2. Click Create.
   3. Enter any name for the statement, such as 2015 Annual Statement.
   4. Click Continue.
   5. Enter any description of the statement.
6. Click Add Category.
7. Select the two categories that you created: Cash Compensation and Stock.
8. Click Apply.
9. Click Done.

2. Configure table display options.
   1. In the Details tab, edit the top-level category names in the Display Name column to make the names more familiar to workers.
   2. In the Description column, add descriptions that display in the statement, as needed.
   3. Select Reorder Top-Level Categories in Statement from the Actions menu.
   4. Select the first category and use the downward arrow to place it after the other category.
   5. Click OK.
   6. Click Save.
   7. Click OK.

3. Define statement periods and welcome message.
   1. Select the Statement Periods tab.
   2. Click Add.
   3. Complete the fields to create two annual periods, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>01-Jan-2015</td>
</tr>
<tr>
<td>End Date</td>
<td>31-Dec-2015</td>
</tr>
<tr>
<td>Date Available to Workers</td>
<td>01-Mar-2015</td>
</tr>
<tr>
<td>Currency Conversion Date</td>
<td>31-Dec-2015</td>
</tr>
<tr>
<td>Number of Periods</td>
<td>2</td>
</tr>
</tbody>
</table>

   4. Click OK.
   5. In the Display Name column, add a display name for each period, such as 2015 Annual Statement and 2016 Annual Statement.
   6. Click the button in the Welcome Message column to compose a welcome message that workers see as the first page in the statement.
   7. Type Dear followed by a space.
   8. Click Insert Name.
   9. In the First Name row, click the Insert Segment button.
   10. Click Done.
   11. Enter a comma after the first name placeholder in the welcome message.
12. Use the rich text editor to complete the welcome message.
13. Click Save and Close.

Configuring Optional Eligibility and Statement Summary Page

1. Select the Statement Options tab.
2. In the Eligibility Profile field, select IC Annual Salary.
3. Click Configure Summary Page.
4. In the Monetary Compensation section, select the Table tab and verify the table contents.
5. Select the Graphs tab.
6. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value for the First Graph</th>
<th>Value for the Second Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graph Title</td>
<td>Your Total Compensation</td>
<td>How Your Compensation Adds Up</td>
</tr>
<tr>
<td>Graph Type</td>
<td>Bar</td>
<td>Bar - stacked</td>
</tr>
<tr>
<td>Graph Items</td>
<td>Company Contributions</td>
<td>Company Contributions</td>
</tr>
</tbody>
</table>

7. Click Save.
8. Click OK.
9. Select the Descriptive Text tab.
10. Enter any text that you want to appear in the summary page specifically related to monetary compensation.
11. Scroll down to the Summary Page Descriptive Text section and expand it.
12. Enter some text, such as: The summary provides you an overview of your compensation package. Click each category name to view additional details.
13. Click Save and Close.
14. Click OK.
15. Click Finish to validate the statement.

Generating and Viewing Statements

Update global settings, run the process to generate the statements, check the process reports, and view workers' generated statements.

1. Generate statements.
2. Monitor the process.
3. View the statements.

1. Generate statements.
   1. Click the Configure Global Settings task.
2. Complete the fields used for default stock estimates in the statement, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Stock Price</td>
<td>35</td>
</tr>
<tr>
<td>Currency</td>
<td>US Dollar</td>
</tr>
</tbody>
</table>

3. Click the **Generate Statements** task to access the Process Details page.
4. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement Definition Name</td>
<td>2015 Annual Statement</td>
</tr>
<tr>
<td>Statement Period</td>
<td>2015 Annual Statement</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>Infusion USA</td>
</tr>
</tbody>
</table>

5. Click **Submit**.
6. Click **OK**.

---

2. **Monitor the process.**

1. Click the **Monitor Processes** task.
2. Find your process in the table.
3. If the status is **Processing**, click **Refresh**.
4. When the status is **Completed**, click the button in the **Reports** column for your process ID.
5. Analyze the summary details.

---

3. **View the statements.**

You must have the Compensation Manager role to view statements.

1. Click the Details tab to see the workers for whom statements were generated.
2. Click the button in the **View Statement** column for a worker.
3. Verify the statement content and formatting.
4. Click **Processing Reports** in the task panel tab to return to the report Details tab.
5. View and verify additional statements as needed.
6. Click **Sign Out**.
7. Close the Browser.
Related Topics

- Eligibility Profiles
Glossary

**action**
Tracks changes to certain Human Capital Management (HCM) records, for example, changes to employment and assignment records. You can create your own actions and associate them with the predefined action types. You can optionally associate action reasons with actions.

**alternate approver**
Approver of a workforce compensation worksheet who is outside of the standard approval hierarchy.

**annualization factor**
Multiplication factor used to convert base salary to an annualized amount.

**assignment**
A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

**assignment statement**
A statement that formulas use to set a value for a local variable.

**band**
A specified range of values. Example: An age band defines a range of ages, such as 25 to 30, used to determine a person's eligibility.

**benefits object hierarchy**
A structure that enables efficient management of benefits that share similar attributes. The four object types used to structure benefits offerings are programs, plan types, plans, and options.

**benefits offering**
Any of an organization's nonsalary components of employee benefits packages, such as health, savings, life insurance, recreation, goods, or services.
COLA
Abbreviation for cost of living adjustment

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

consolidation group
A grouping of payroll runs within the same period for the same payroll, for which you can run reporting, costing, and post-run processing. You can specify a default consolidation group for each payroll definition.

collection column
Table columns that display compensation items representing the worker's or company's contribution amounts in a total compensation statement or compensation category.

database item
An item of information with special programming attached, which formulas and HCM extracts use to locate and retrieve the data.

derived factor
Calculated eligibility criterion that changes over time, such as age or length of service.

determinant
A value that specifies the use of a reference data set in a particular business context.

element
Component in the calculation of a person's pay. An element may represent a compensation or benefit type, such as salary, wages, stock purchase plans, pension contributions, and medical insurance.

element classification
Provides various element controls, such as the processing order, balances feeds, costing, and taxation. Primary element classifications and some secondary classifications are already defined. You can create other secondary classifications.

element eligibility
The association of an element to one or more components of a person's employment record. It establishes a person's eligibility for that element. Persons are eligible for the element if their assignment components match the components of the element eligibility.

element entry
The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.
**eligibility profile**
A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

**eligible salary**
Pay used to calculate the percentage adjustment of a workforce compensation allocation. It might not equal base pay due to proration or adjustment.

**enterprise**
An organization having common control over one or more legal entities.

**fast formula**
A simple way to write formulas using English words and basic mathematical functions. Formulas are generic expressions of calculations or comparisons that repeat with different input values.

**flexfield segment**
An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

**grade**
A component of the employment model that defines the level of compensation for a worker.

**grade rate**
Used to define pay values for grades in a legislative data group.

**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.

**individual compensation**
Compensation awarded to individual workers outside of the regular compensation cycle, such as a spot bonus or education reimbursement. Some compensation is worker allocated, such as a savings contribution percentage.

**input value**
Field defined for an element that holds information about an element entry that's needed for calculation. For example, hours worked, an alternate payment rate, or the amount of a bonus or deduction.
job
A generic role that's independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

LDG
Abbreviation for legislative data group.

legislative data group
A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

lookup code
An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

lookup type
The label for a static list that has lookup codes as its values.

offering
A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

payroll relationship
Defines an association between a person and a payroll statutory unit based on payroll calculation and reporting requirements.

personal payment method
Method of payment to a person for a particular payroll. When an administrator assigns a person to a new payroll, payments are made using the default organization payment method for the new payroll until a personal payment method exists.

position
A specific occurrence of one job that's fixed within a department. It's also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

profile option
User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

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.

**Query By Example**
The icon for filtering data in a table.

**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.

**rating model**
A scale used to measure the performance and proficiency of workers.

**reference data set**
Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

**retroactive process**
A process that recalculates the amount to pay a person in the current period to account for retrospective changes that occurred in previous payroll periods.

**salary basis**
Defines validation and payroll details for worker base pay. It identifies the currency and period of the quoted base pay and the factor used to annualize base pay. It optionally identifies components or rates used to itemize salary adjustments and the grade rate used to validate salary.

**salary component**
Change reasons that enable itemization of salary adjustments by entering amounts or percentages for one or more components, such as merit or cost of living adjustment.

**set enabled**
A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.
total compensation statement
A statement that communicates compensation, rewards, and benefits to workers. The statement can include traditional compensation and compensation often overlooked by workers.

user-defined criteria
Factors used to determine eligibility for objects such as benefits offerings and rates.